

Village of Pinehurst
2015 DirectionFinder®
Resident Survey Findings

Presented by

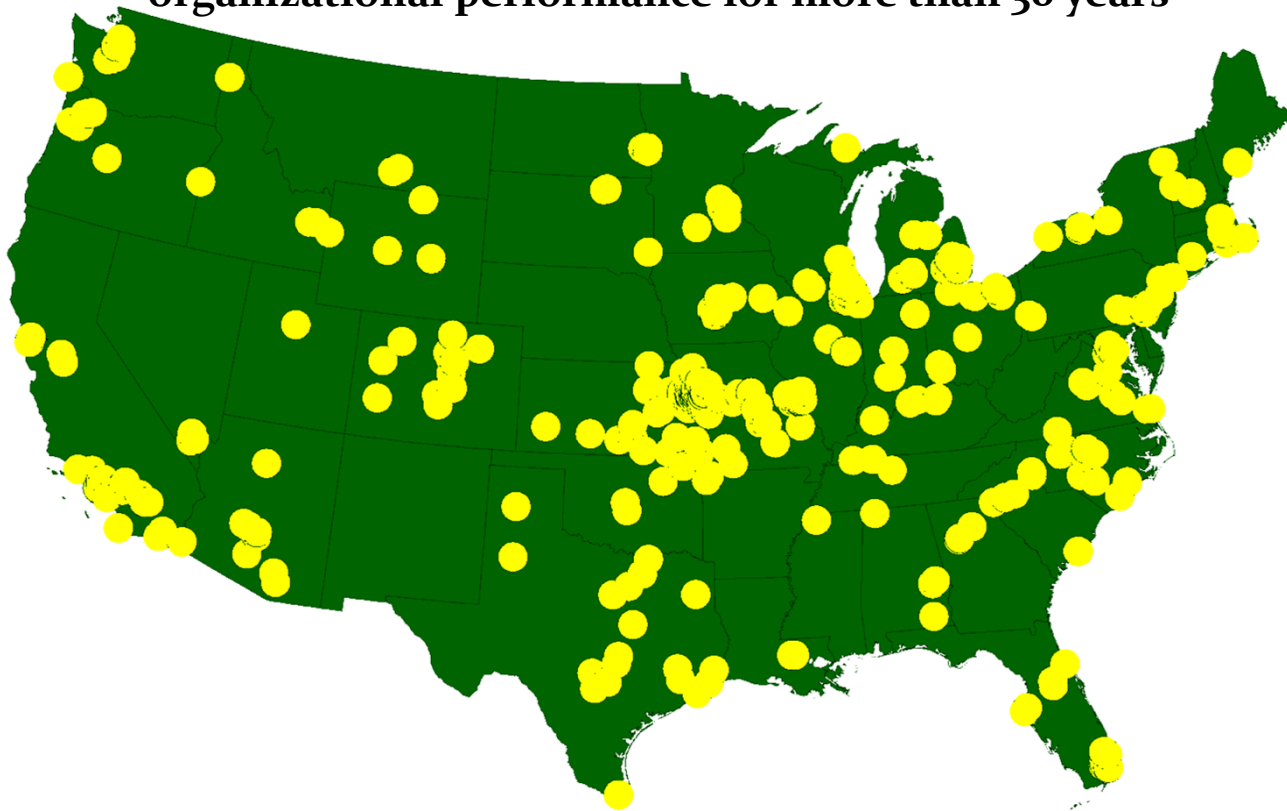


October 2015

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

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



More than 2,050,000 Persons Surveyed Since 2006
for more than 800 cities in 49 States

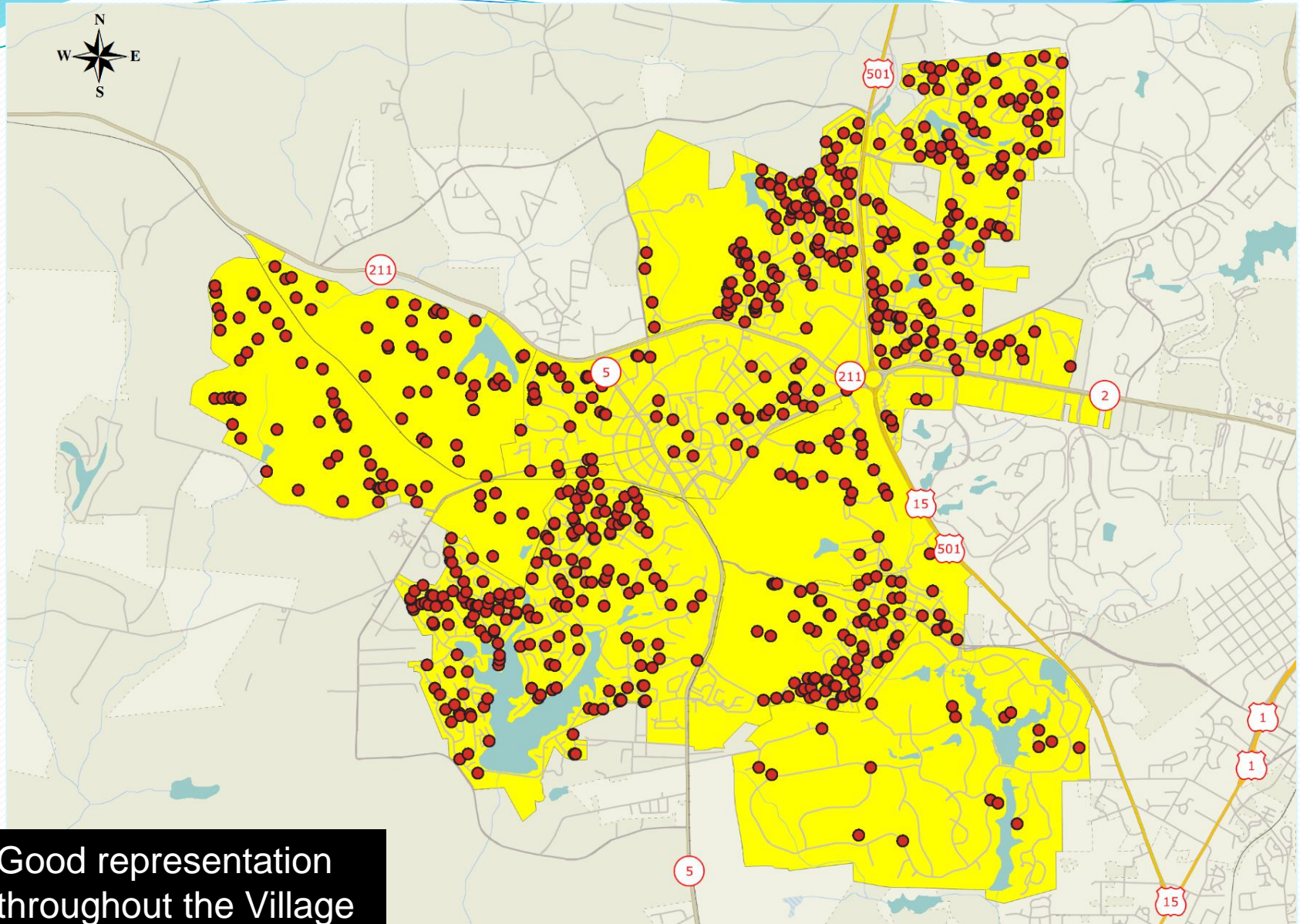
Purpose

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

Methodology

- **Survey Description**
 - ❑ seven-page survey
 - ❑ fourth *DirectionFinder*® Survey conducted for the Village
 - ❑ included many of the same questions that were asked in previous years
- **Method of Administration**
 - ❑ by mail, phone, and online
 - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:** 753 completed surveys
- **Confidence level:** 95⁰%
- **Margin of error:** +/- 3.6⁰% overall

Location of Survey Respondents



Good representation
throughout the Village

2015 Village of Pinehurst Resident Survey

Bottom Line Up Front

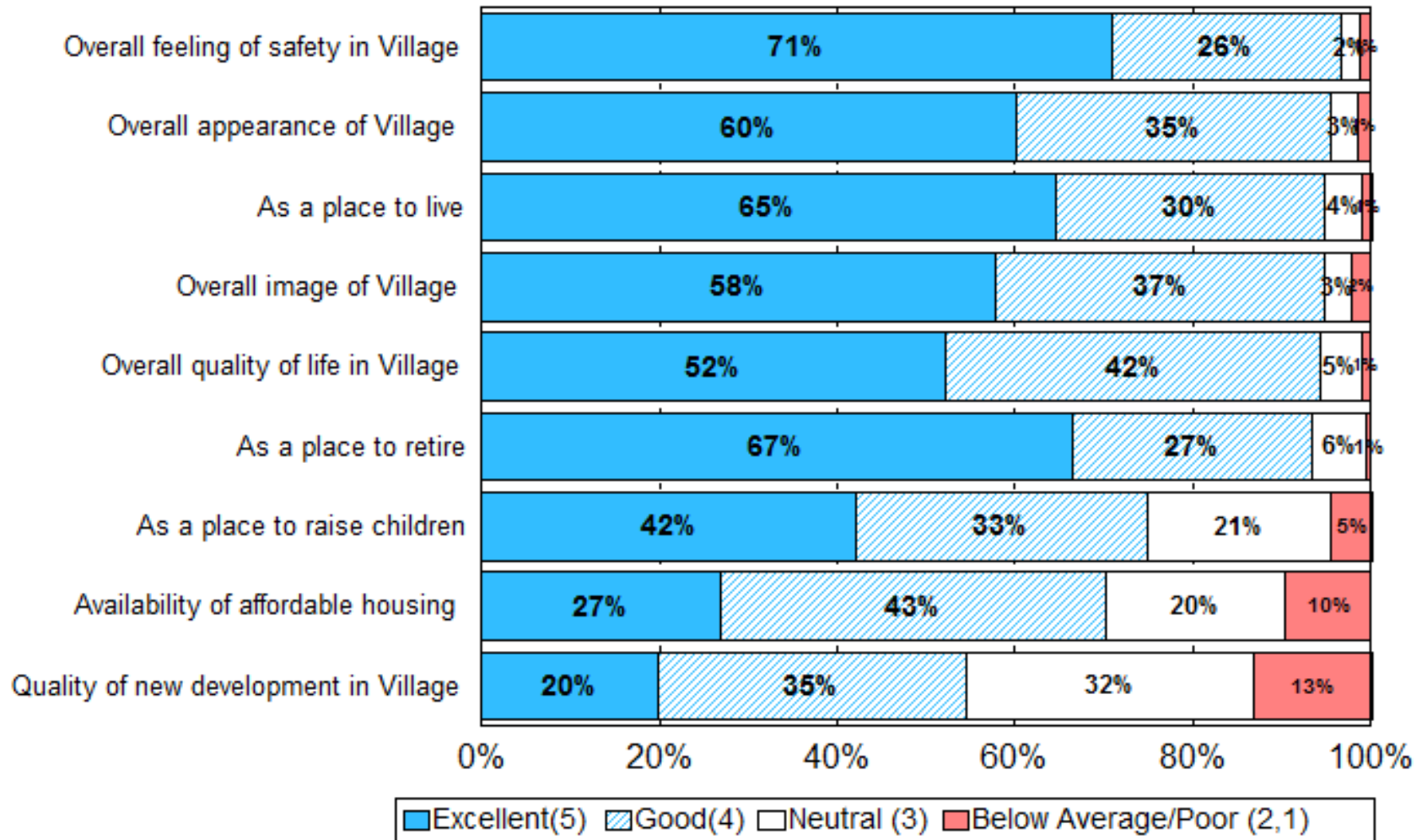
- **Residents Have a Very Positive Perception of the Village**
 - ❑ 97% would recommend Pinehurst to others as a place to live
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 55 of 87 areas that were rated since 2014
- **Pinehurst is Setting the Standard for Service Delivery Compared to Other Communities**
 - ❑ The Village rated above the National Average in 39 of the 44 areas that were compared
 - ❑ The Village rated significantly above the National Average in 37 of the 44 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Enforcement of Village codes and ordinances
 - ❑ Efforts at maintaining the quality of neighborhoods

Major Finding #1

Residents Have a Very Positive
Perception of the Village

Q4. Perception Residents Have of Pinehurst as a Community

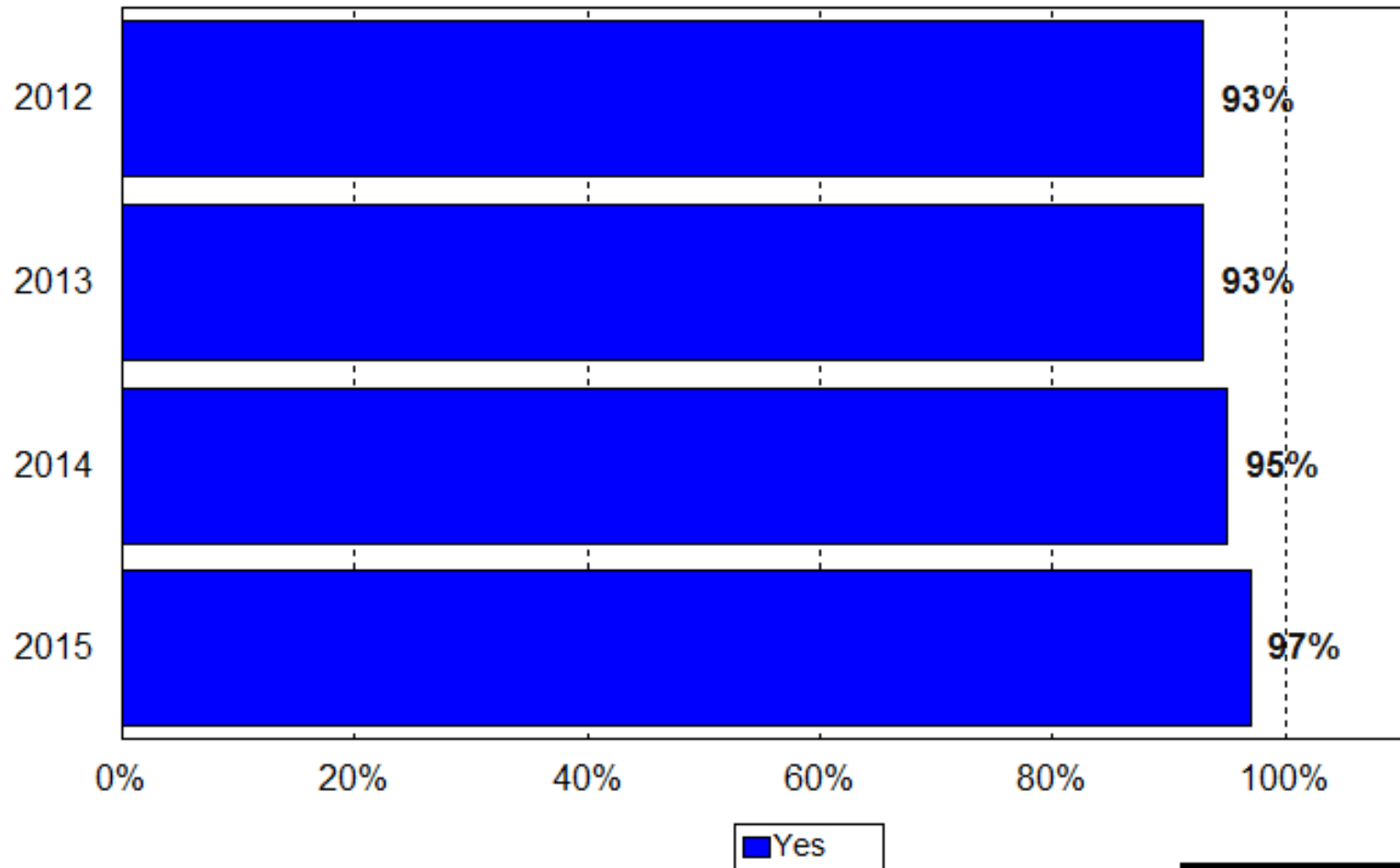
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")



95% rated the Village as an "excellent" or "good" place to live, and 94% of residents rated the overall quality of life in the Village as "excellent" or "good"

Q25. Would you recommend Pinehurst to others as a place to live?

by percentage of respondents

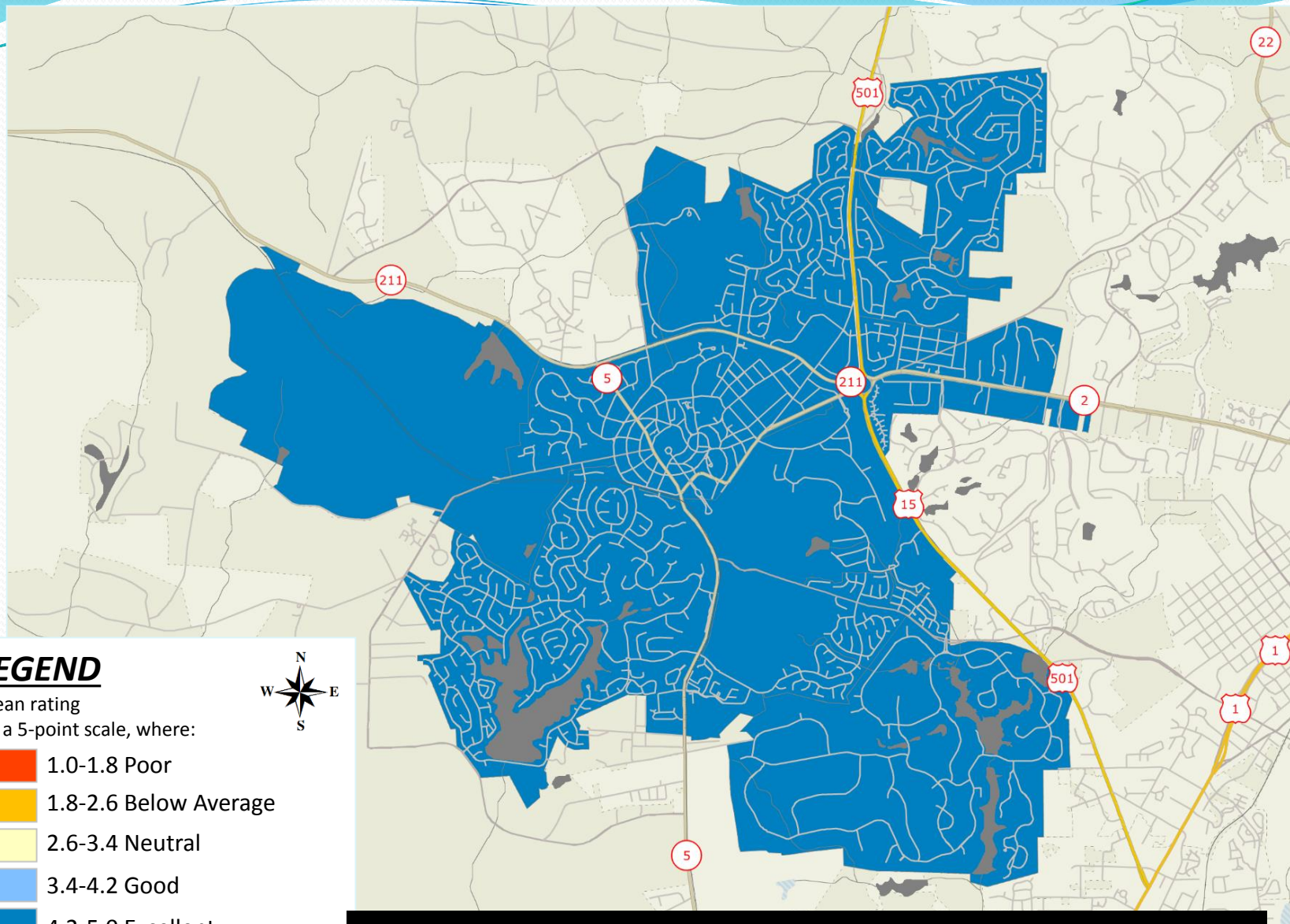


Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

97% of residents would recommend Pinehurst to other as a place to live

Q4b. Overall Quality of Life in the Village



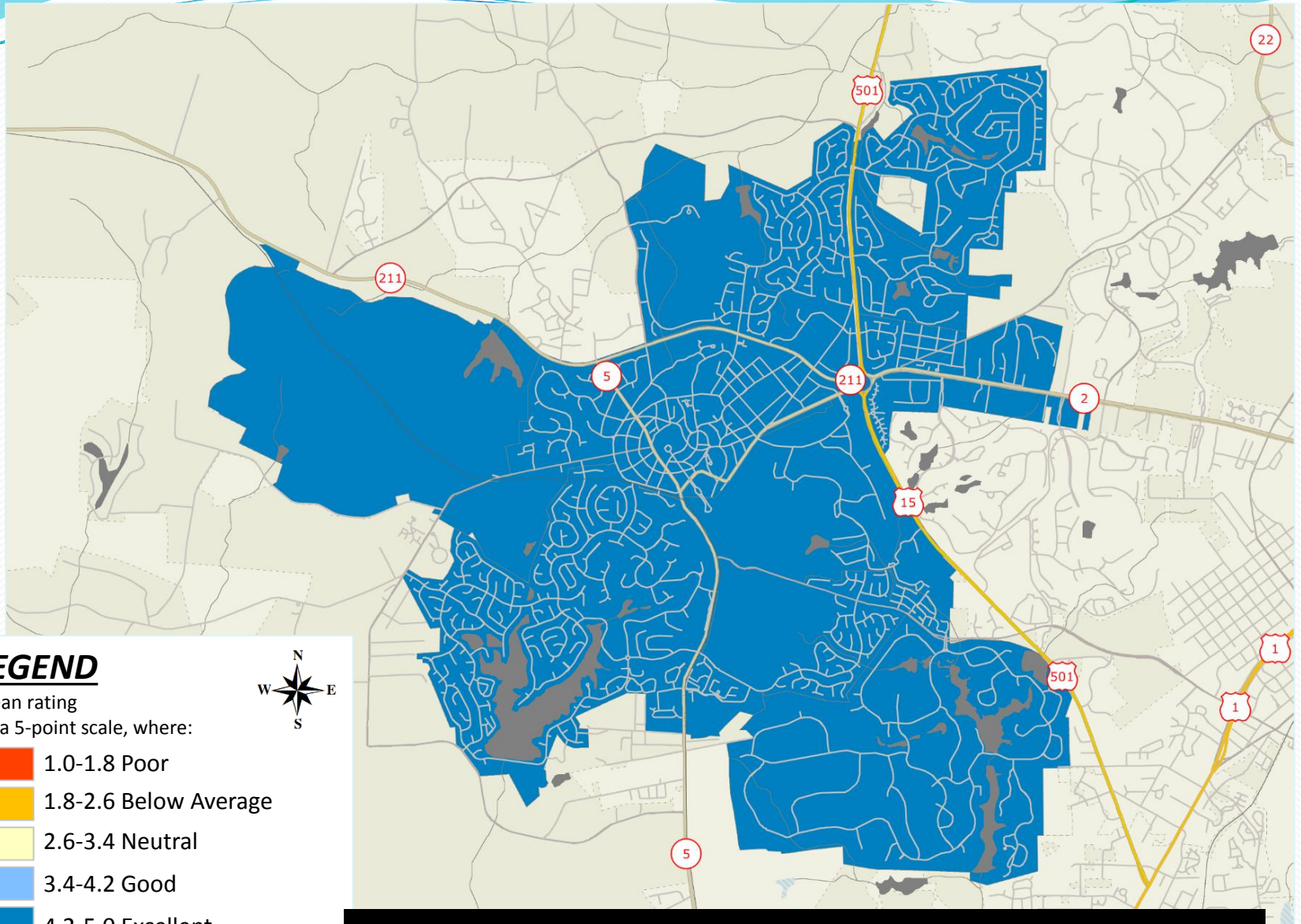
LEGEND

Mean rating
on a 5-point scale, where:

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

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

Q4e. Pinehurst as a Place to Live



LEGEND

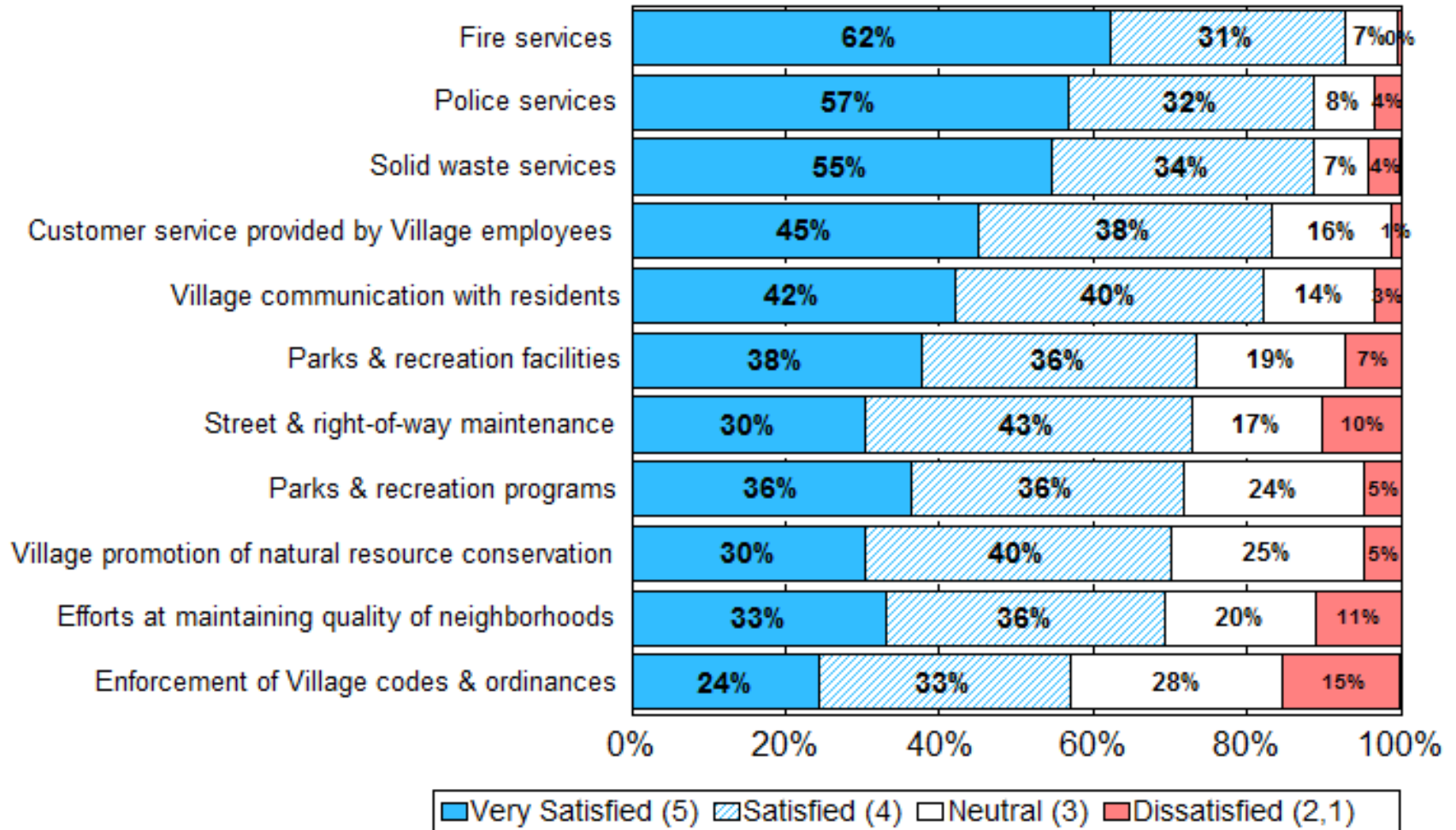
Mean rating
on a 5-point scale, where:

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

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

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

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



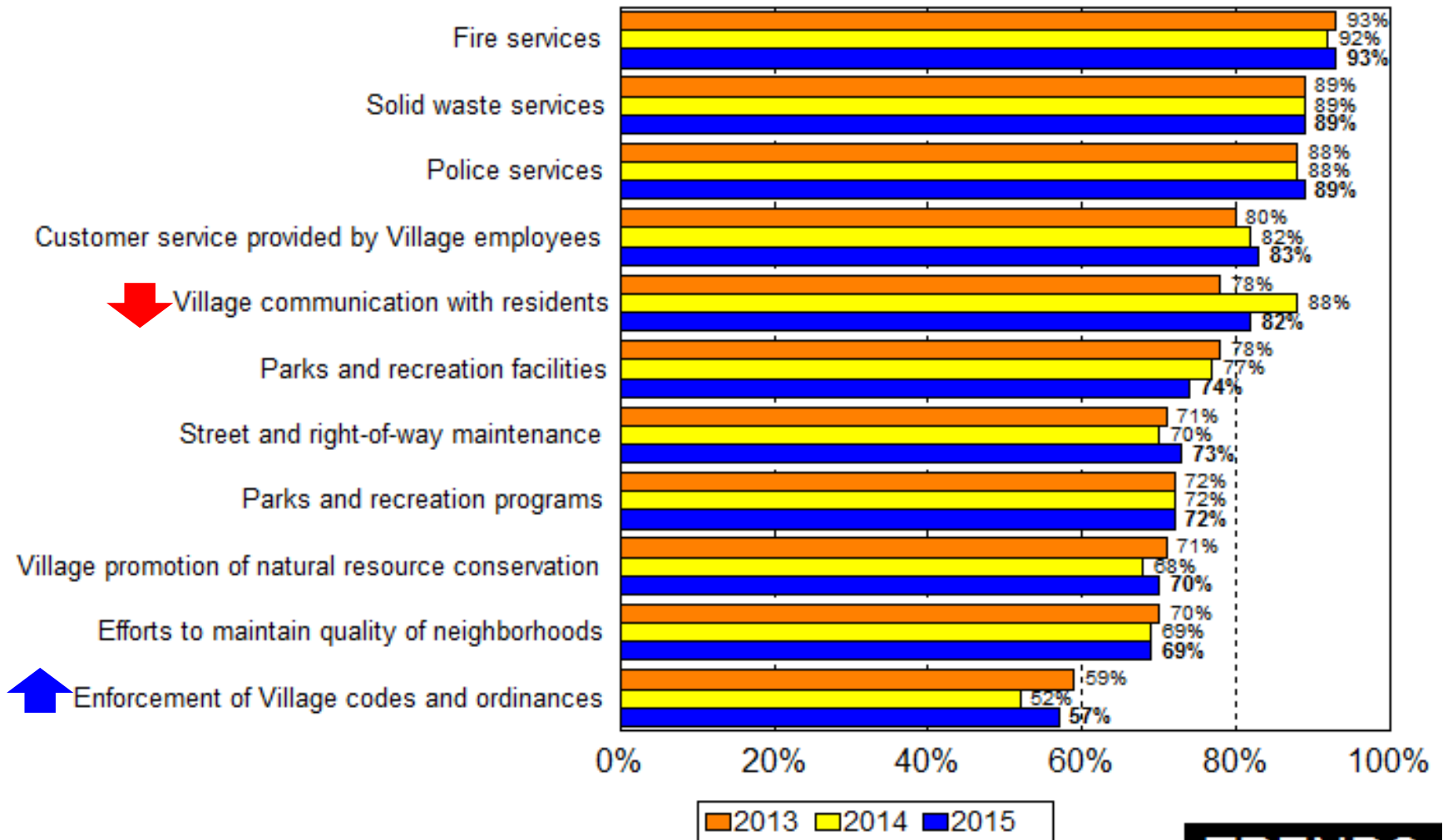
15% or Less of Residents Surveyed Were Dissatisfied with Any of the Major Categories of Village Services Rated

Major Finding #2

Satisfaction Ratings Have
Increased in Many Areas Since
Previous Surveys

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2013, 2014 & 2015

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



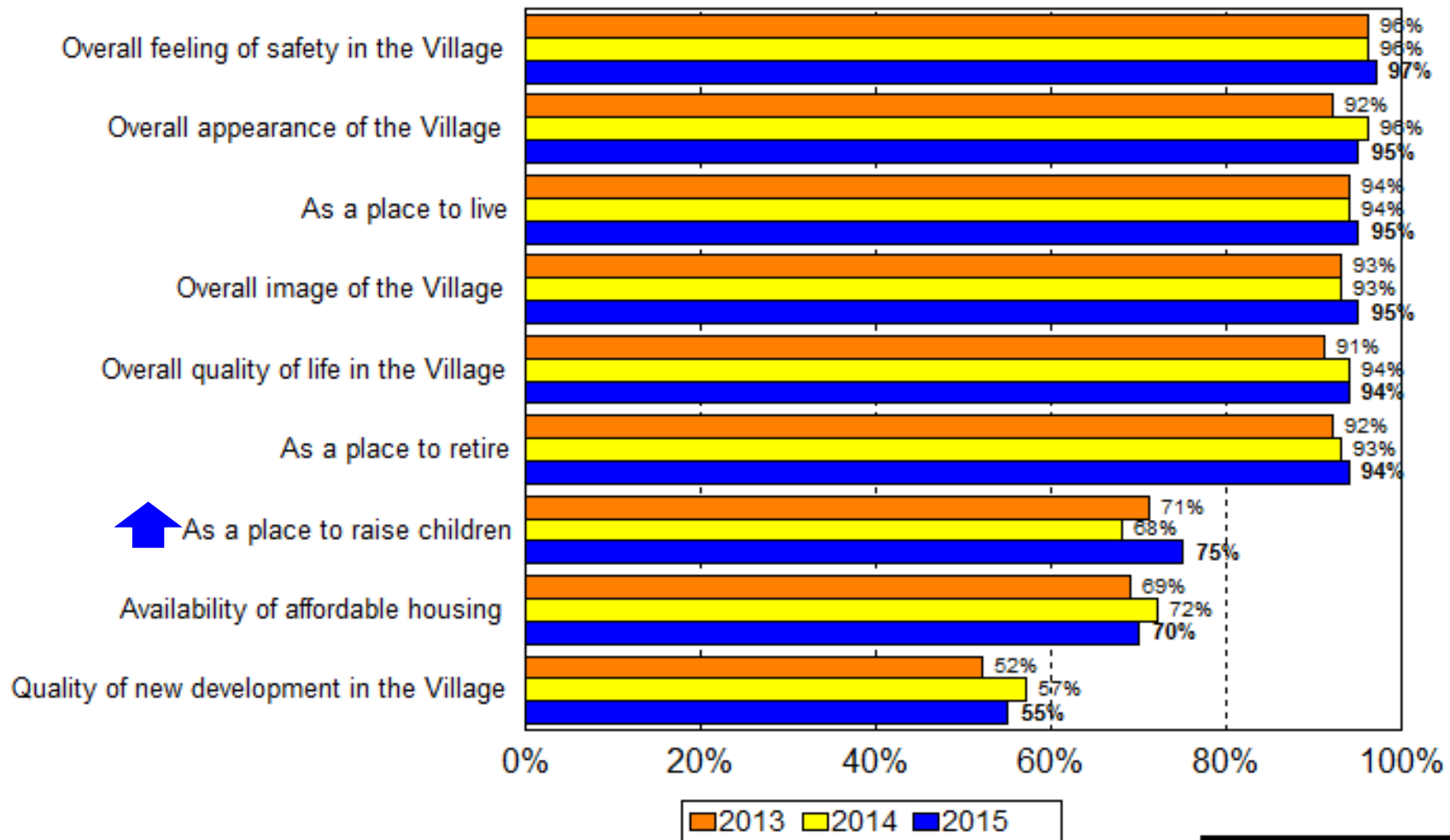
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: ↑ **Significant Decreases From 2014:** ↓

Q4. Perception Residents Have of Pinehurst as a Community - 2013, 2014 & 2015

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



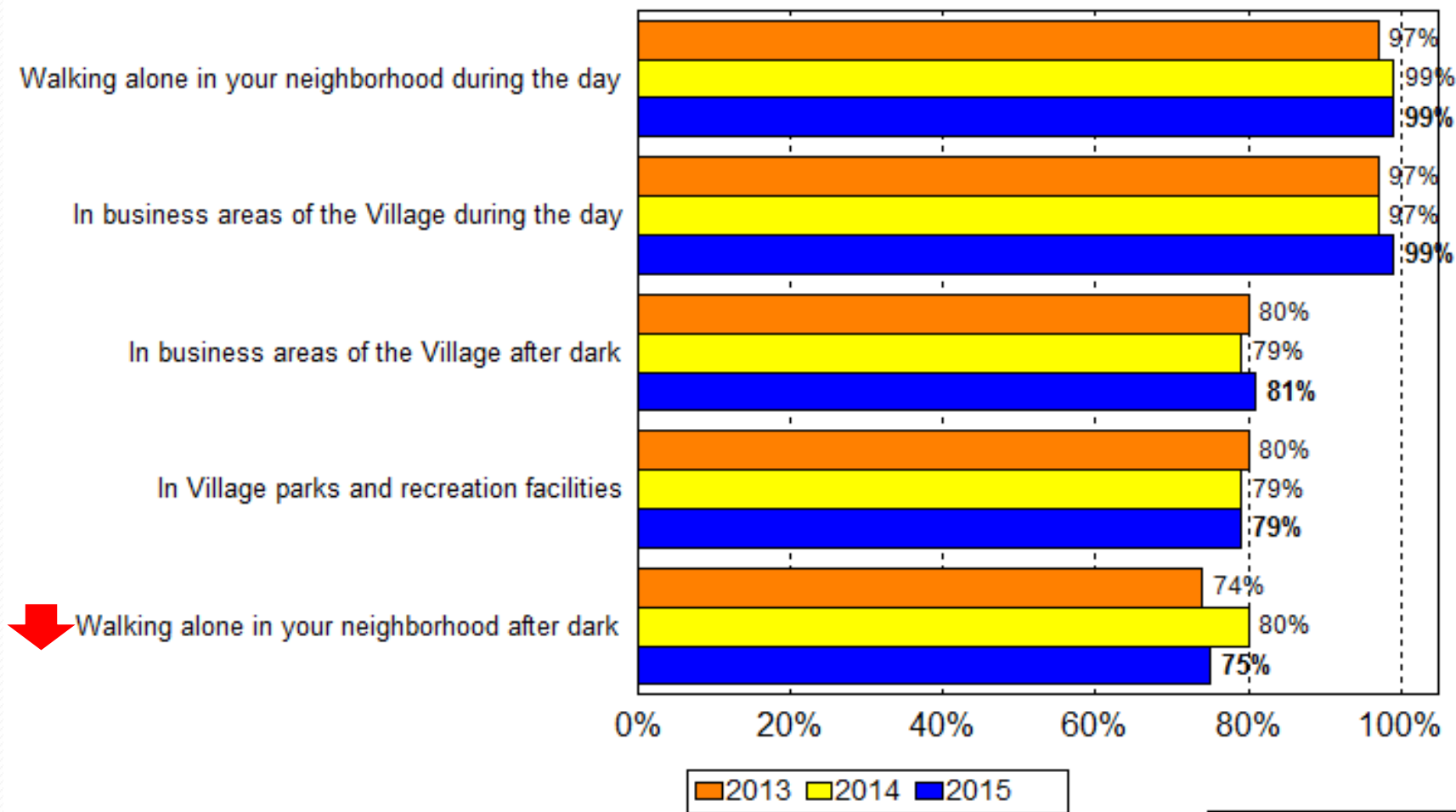
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: ↑ **Significant Decreases From 2014:** ↓

Q5. Perceptions of Safety and Security in Pinehurst - 2013, 2014 & 2015

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



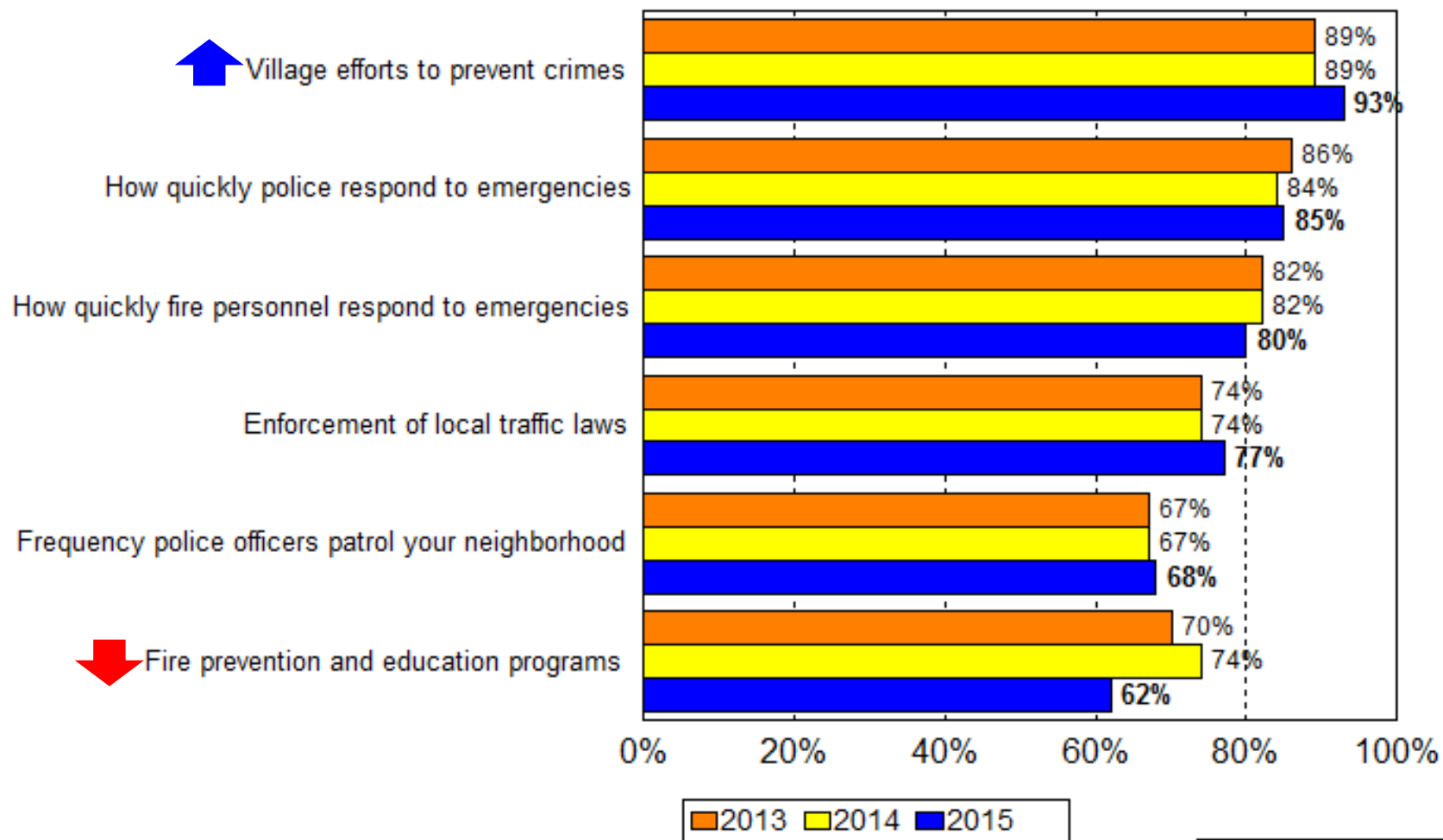
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: Significant Decreases From 2014:

Q6. Satisfaction with Various Aspects of Public Safety 2013, 2014 & 2015

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



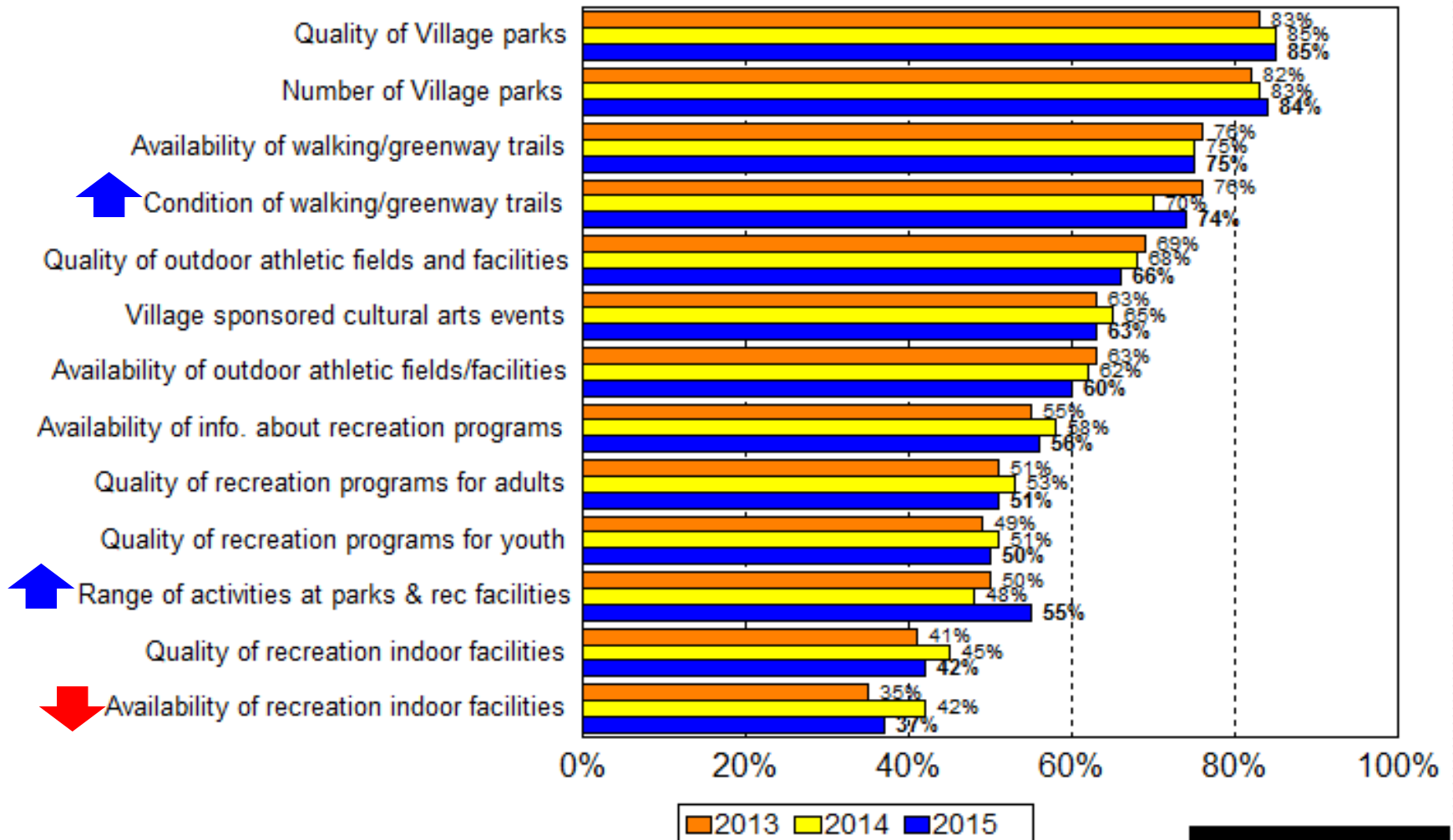
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: Significant Decreases From 2014:

Q8. Satisfaction with Various Aspects of Cultural and Recreation Services - 2013, 2014 & 2015

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



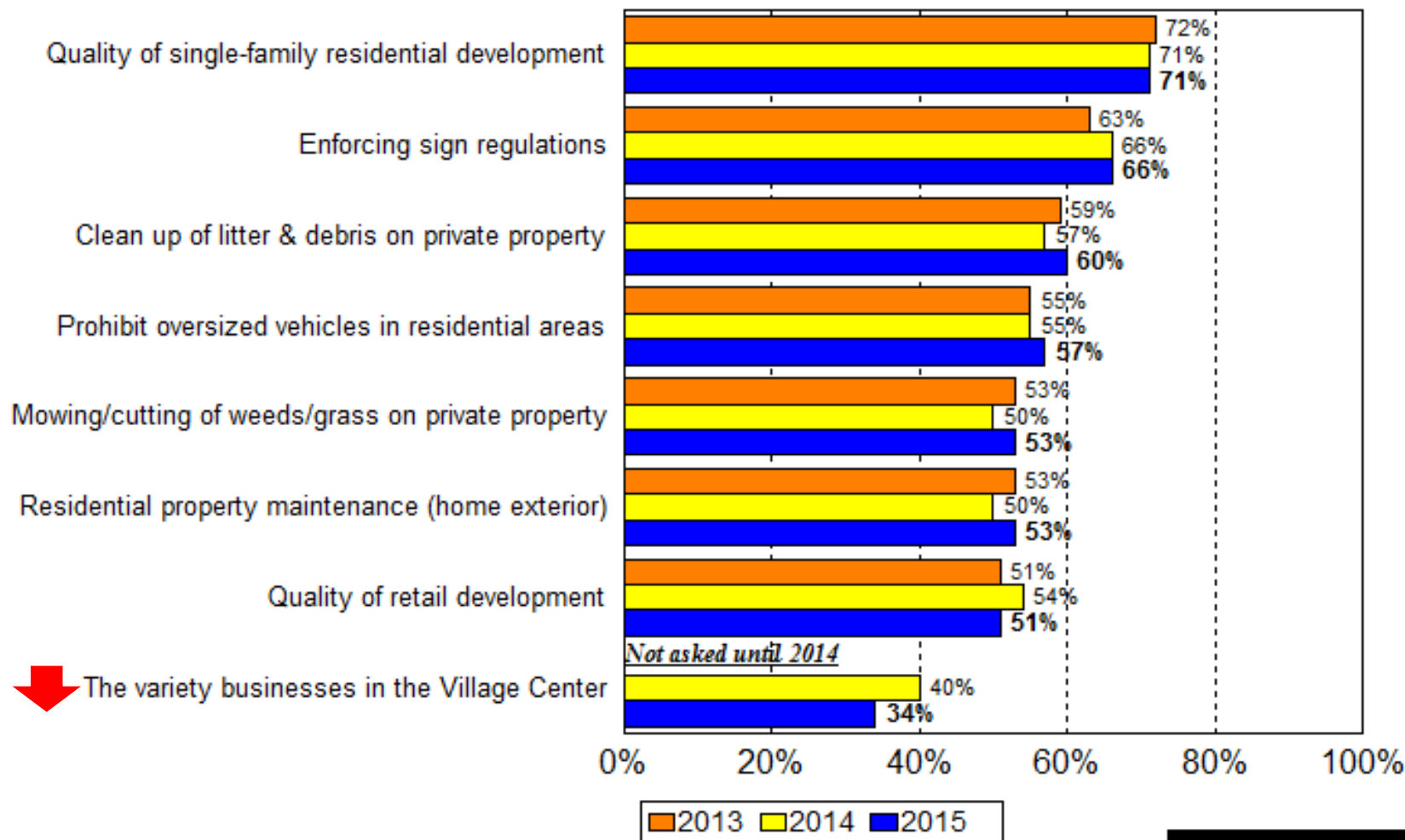
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: **Significant Decreases From 2014:**

Q12. Satisfaction with Various Aspects of Community Development - 2013, 2014 & 2015

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



TRENDS

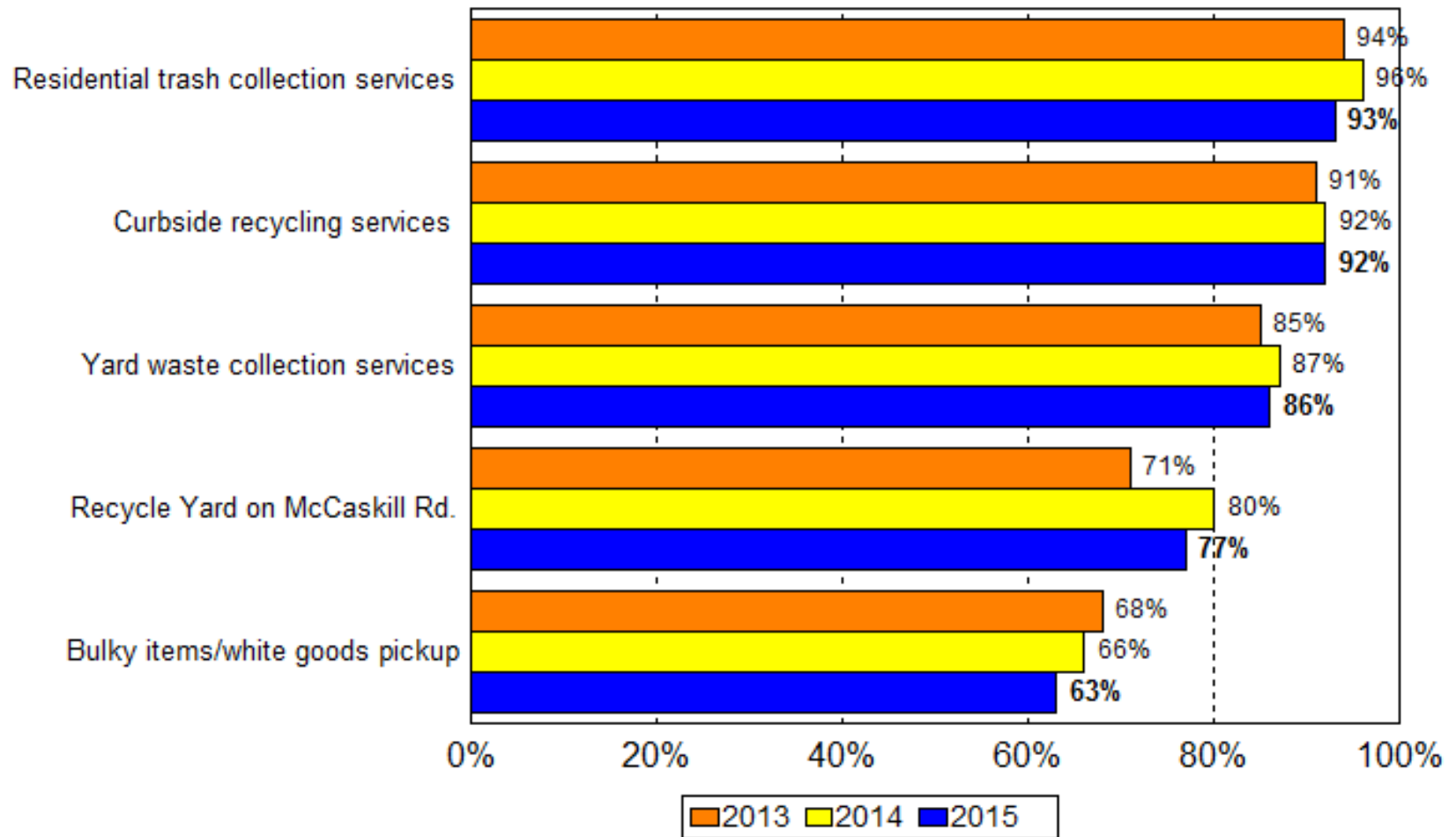
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Significant Increases From 2014:

Significant Decreases From 2014:


Q13. Satisfaction with Solid Waste Services - 2013, 2014 & 2015

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



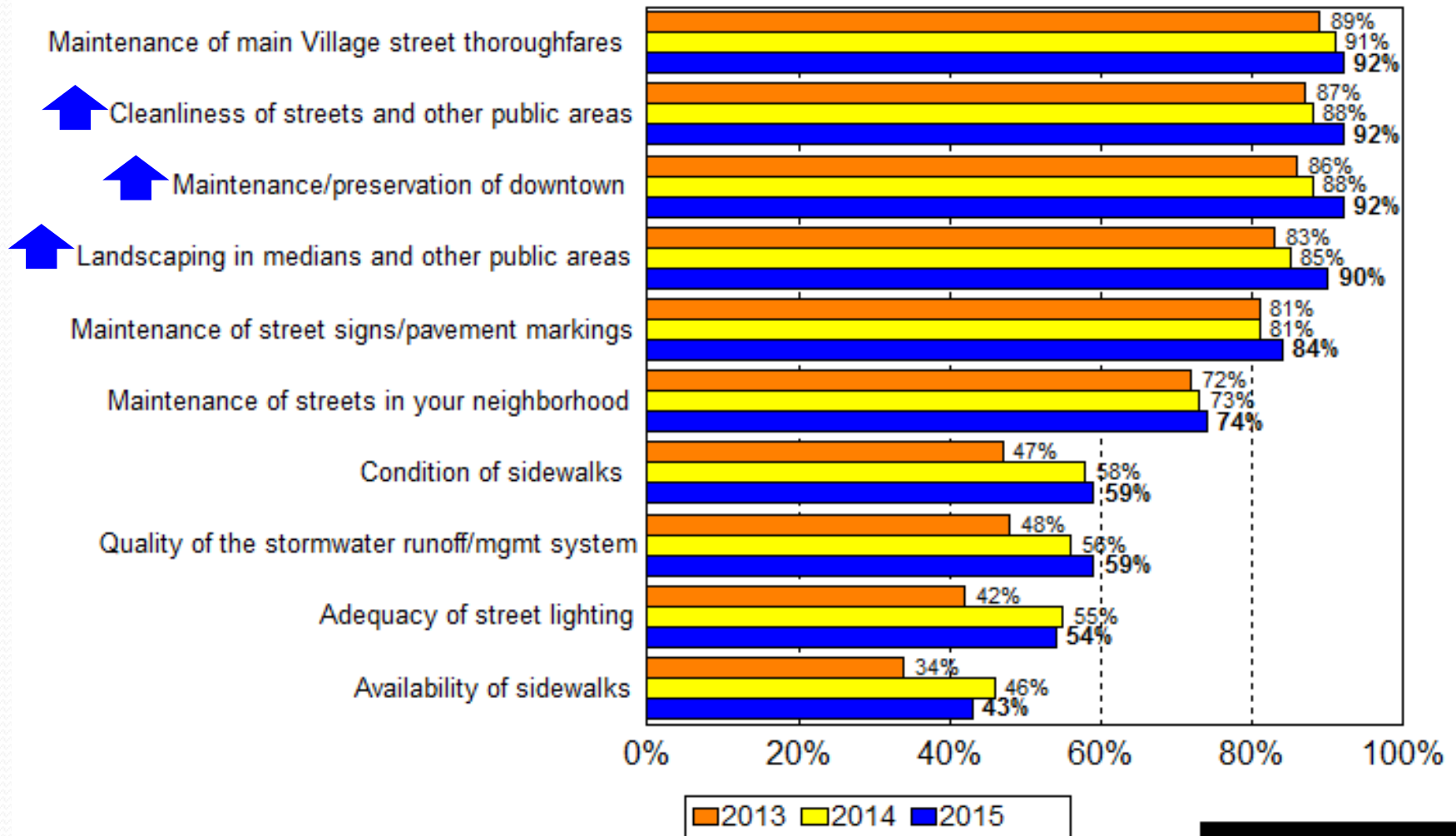
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014:  Significant Decreases From 2014: 

Q14. Satisfaction with Various Aspect of Public Services - 2013, 2014 & 2015

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



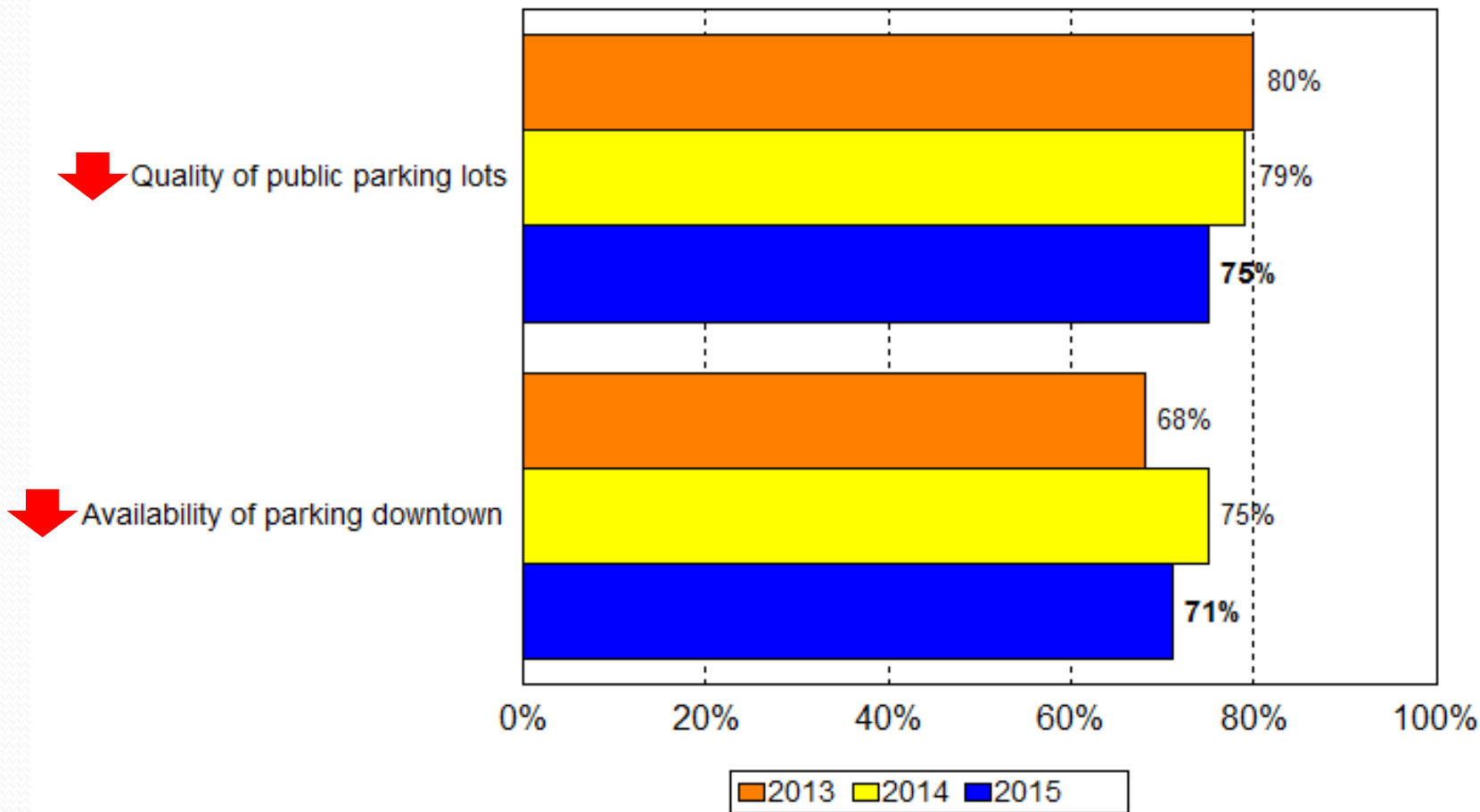
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: ↑ **Significant Decreases From 2014:** ↓

Q17. Satisfaction with Various Aspects of Downtown Parking - 2013, 2014 & 2015

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



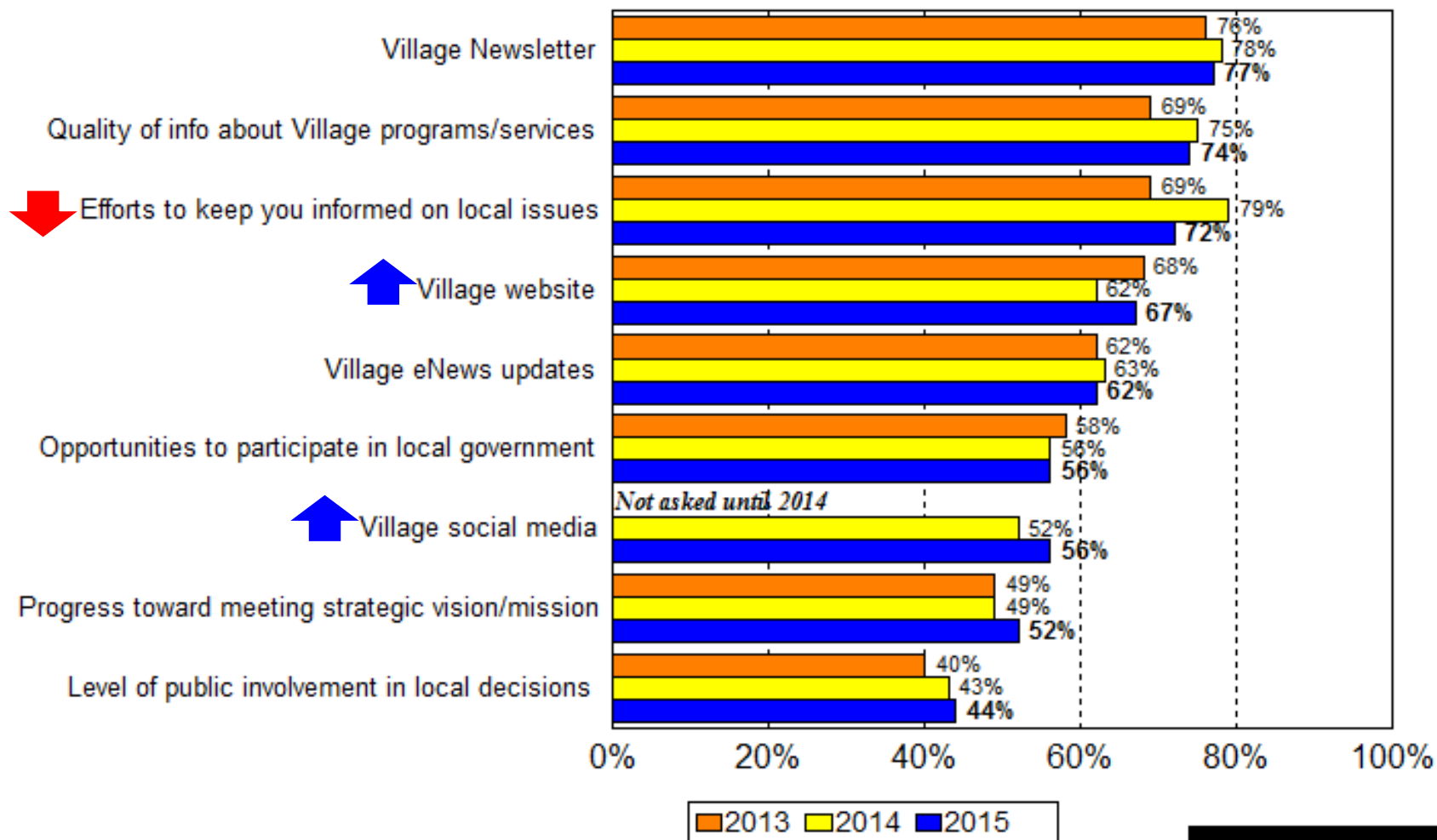
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014:  Significant Decreases From 2014: 

Q18. Satisfaction with Public Communication and Outreach - 2013, 2014 & 2015

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



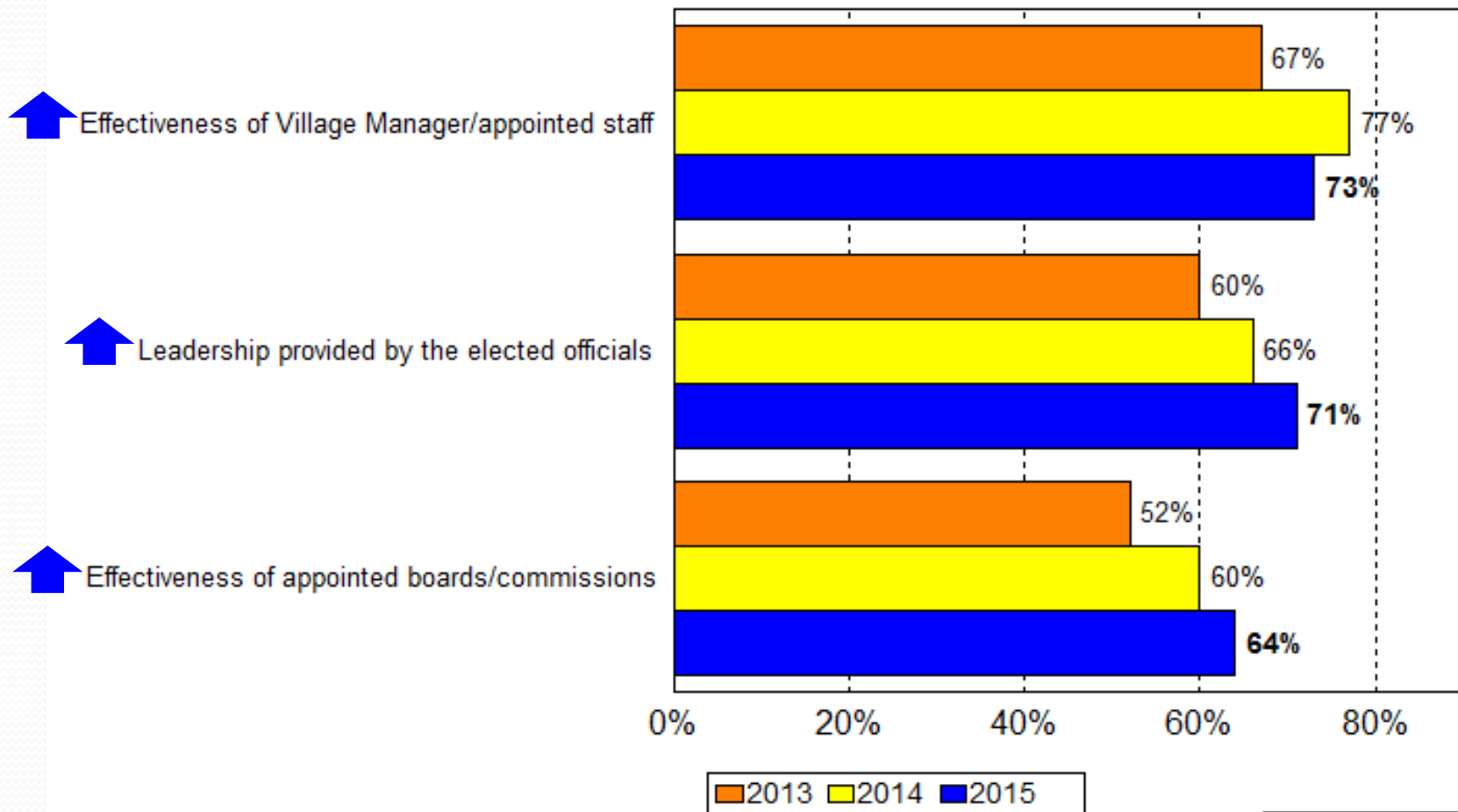
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Significant Increases From 2014: Significant Decreases From 2014:

Q24. Satisfaction with Village Leadership - 2013, 2014 & 2015

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 (2015 - Pinehurst, NC)

TRENDS

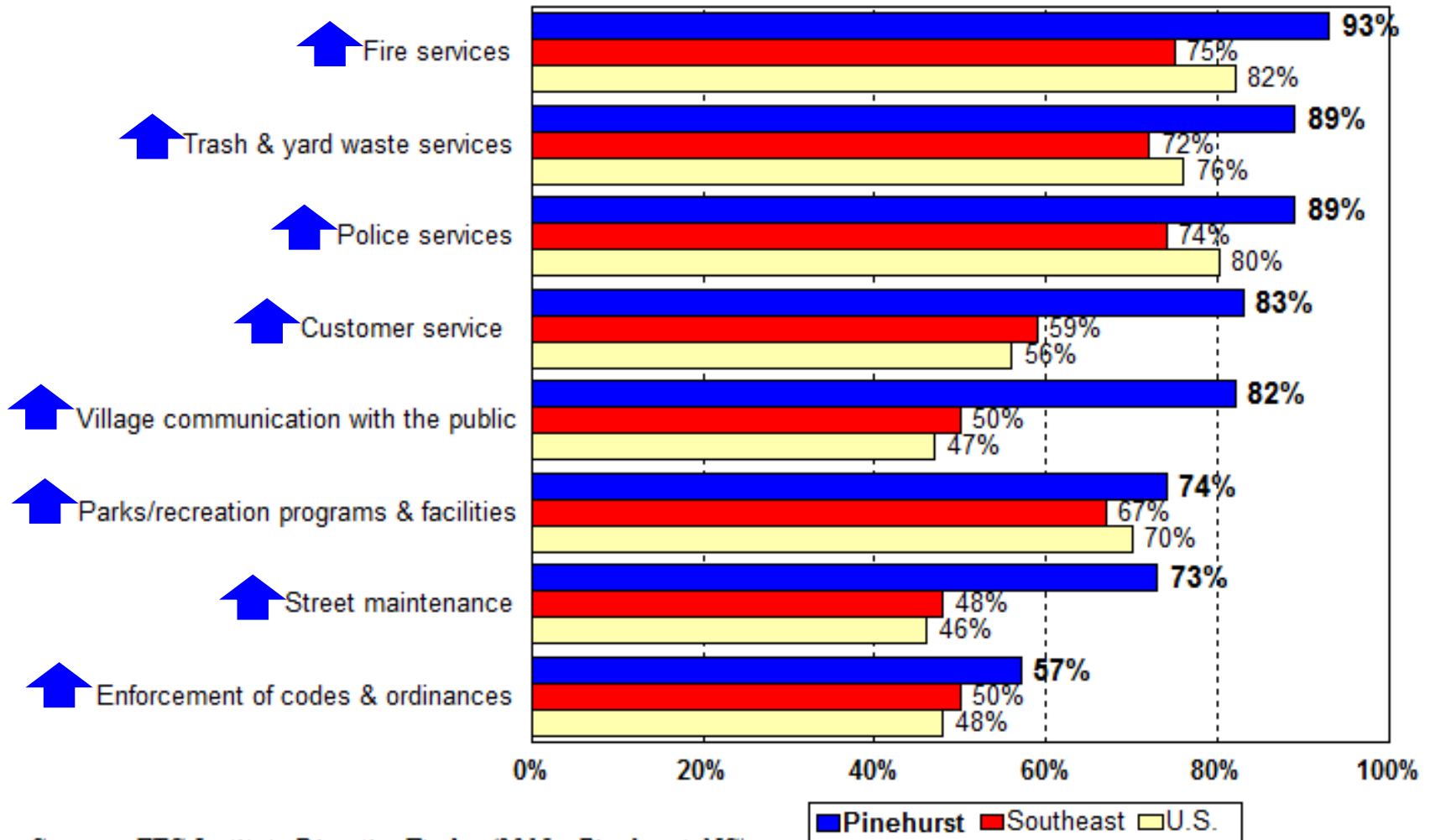
Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Major Finding #3

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

Overall Satisfaction with Various Community Services Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

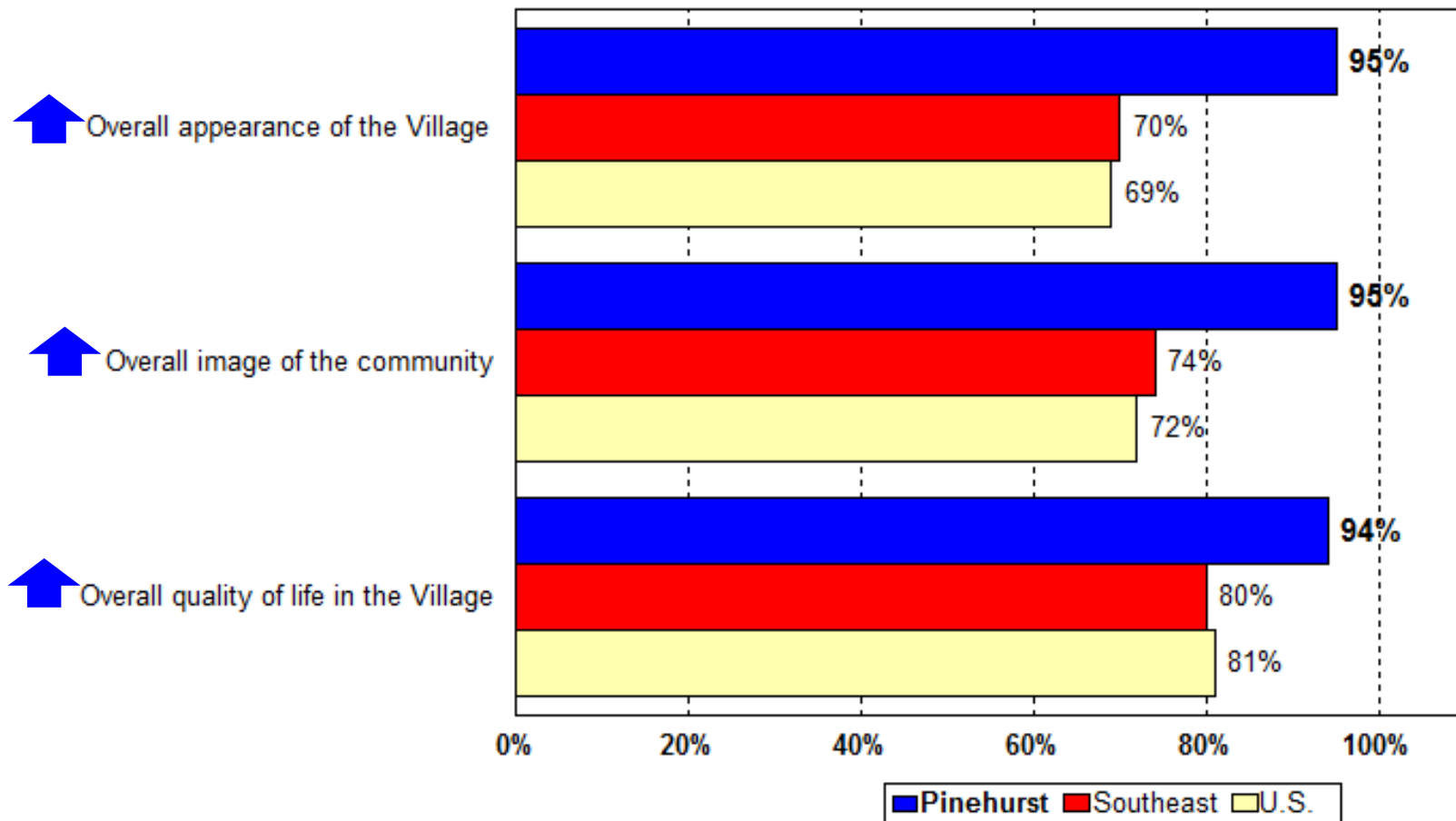
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Issues that Influence Perceptions of the Village

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



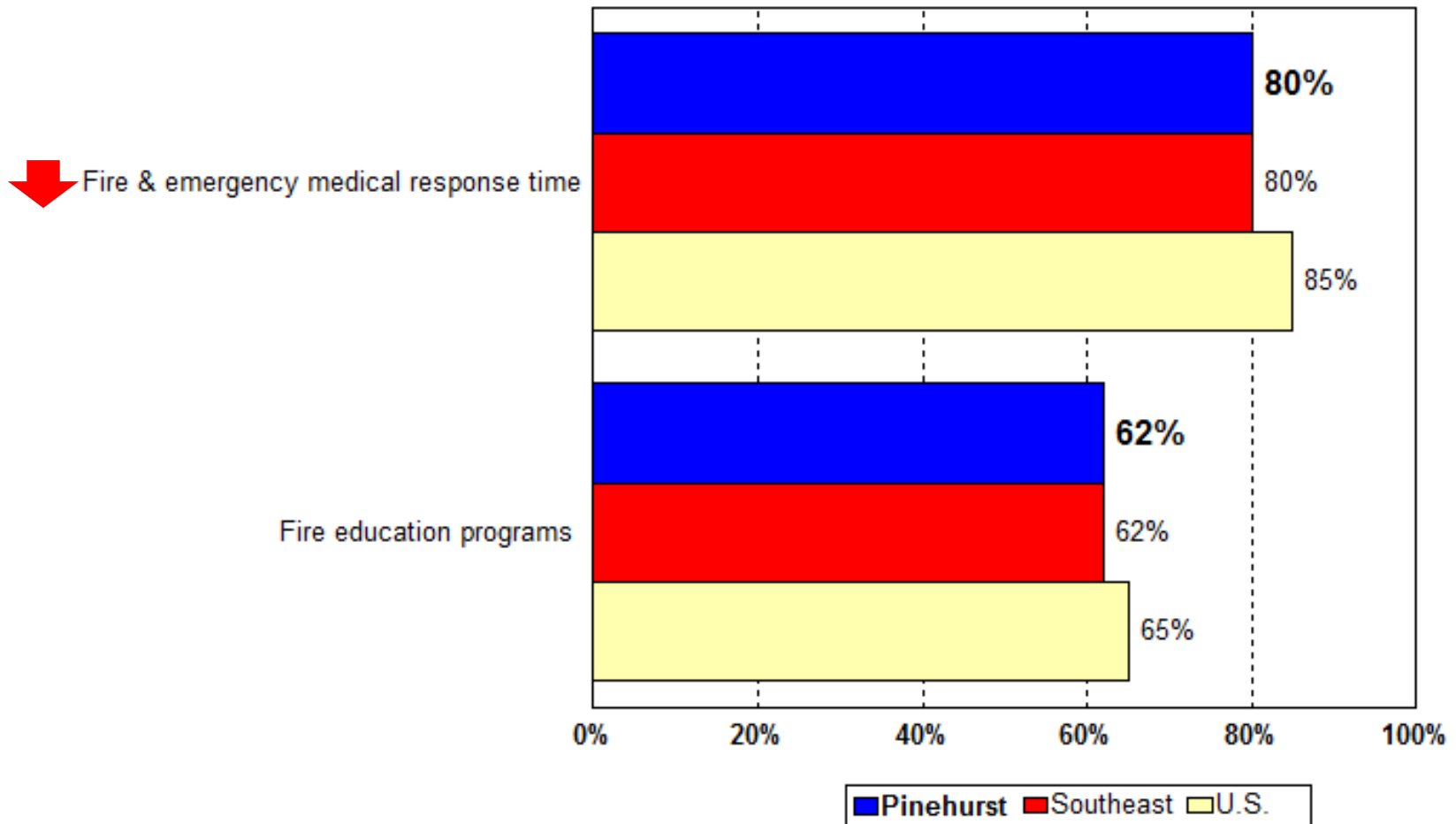
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Fire and Ambulance Services Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

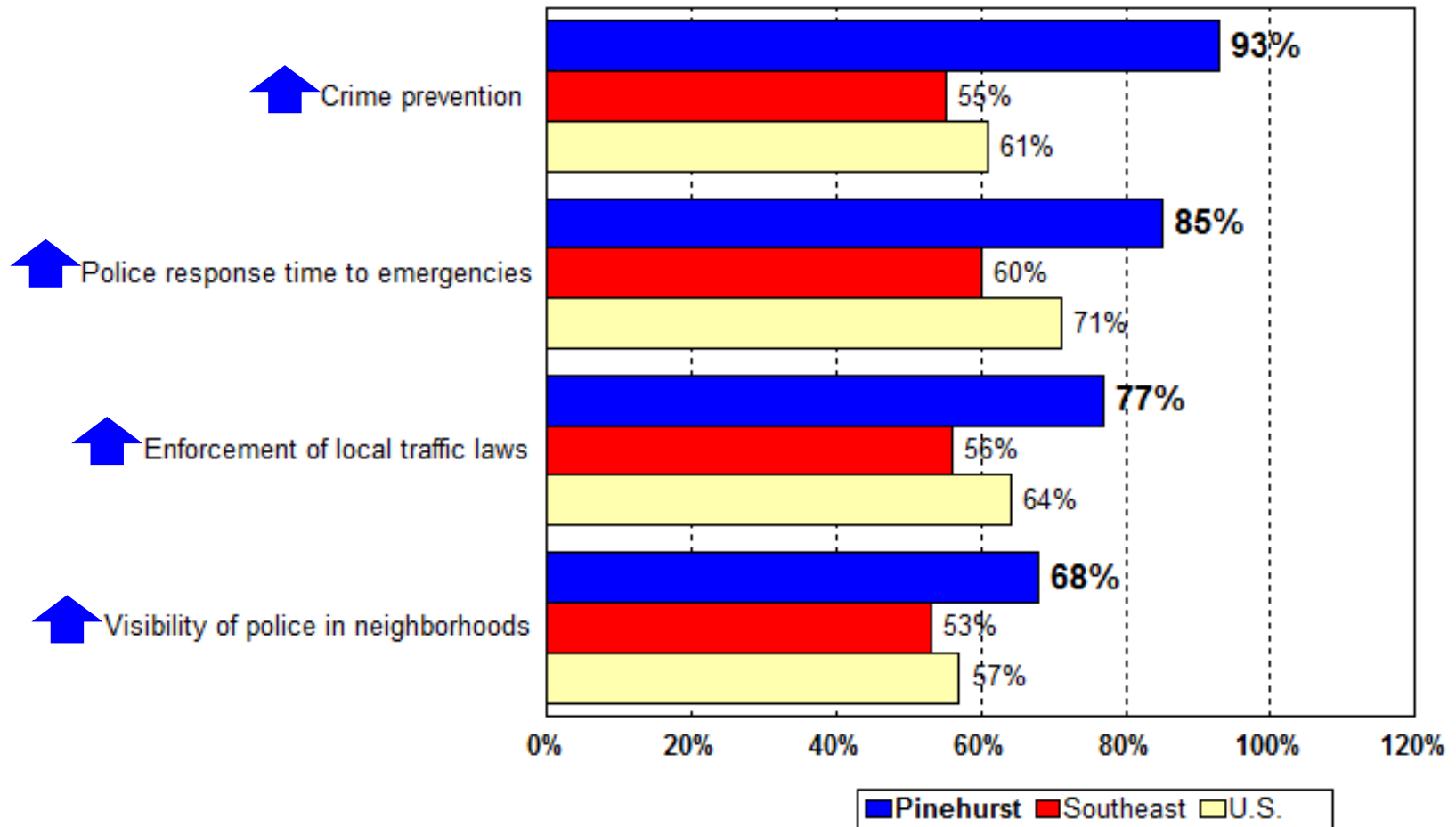
Significantly Higher: 

Significantly Lower: 

Overall Satisfaction with Police Services

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

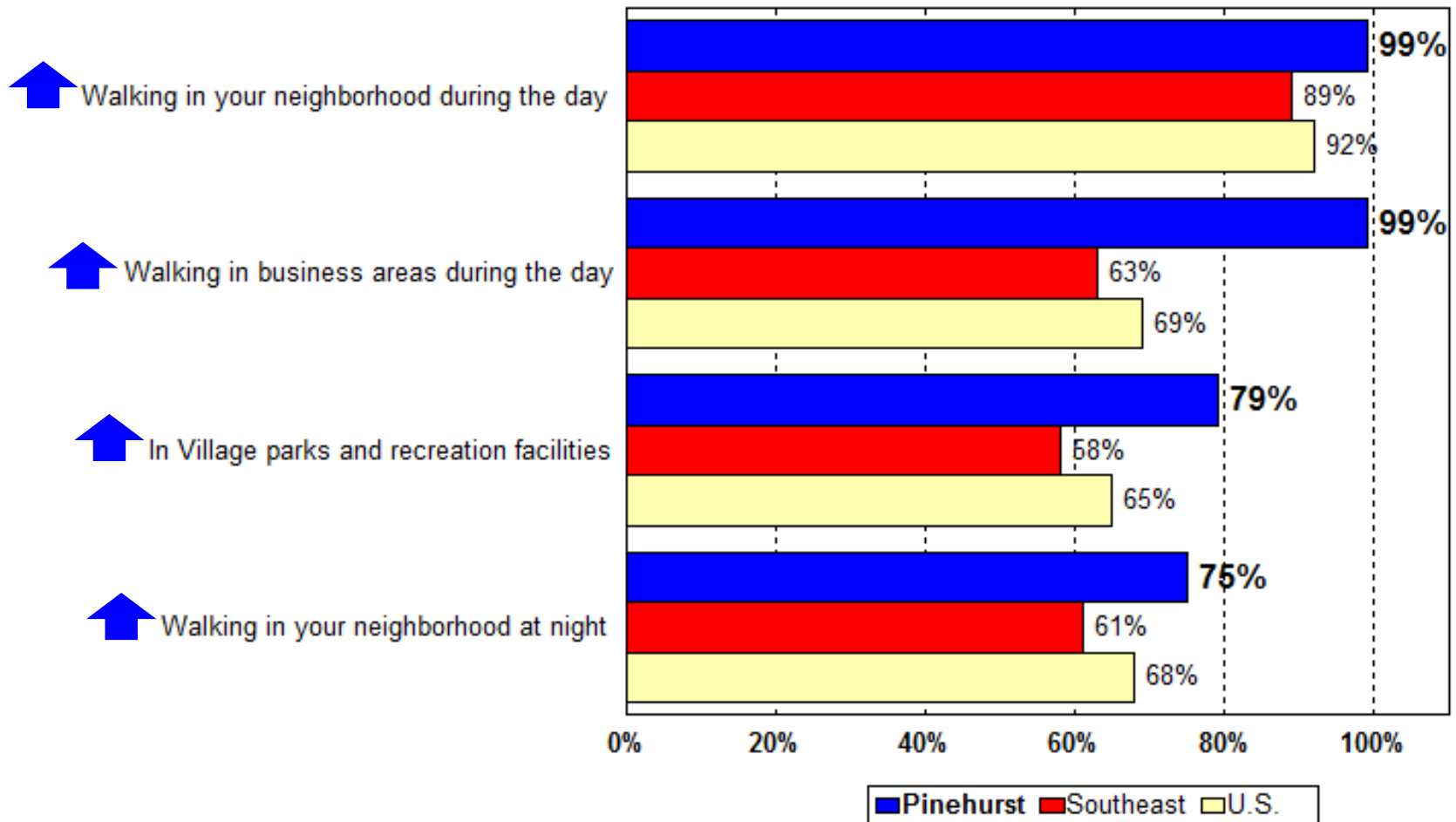
Significantly Higher: ↑

Significantly Lower: ↓

How Safe Residents Feel in Their Community

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very safe" and 1 was "very unsafe" (excluding don't knows)



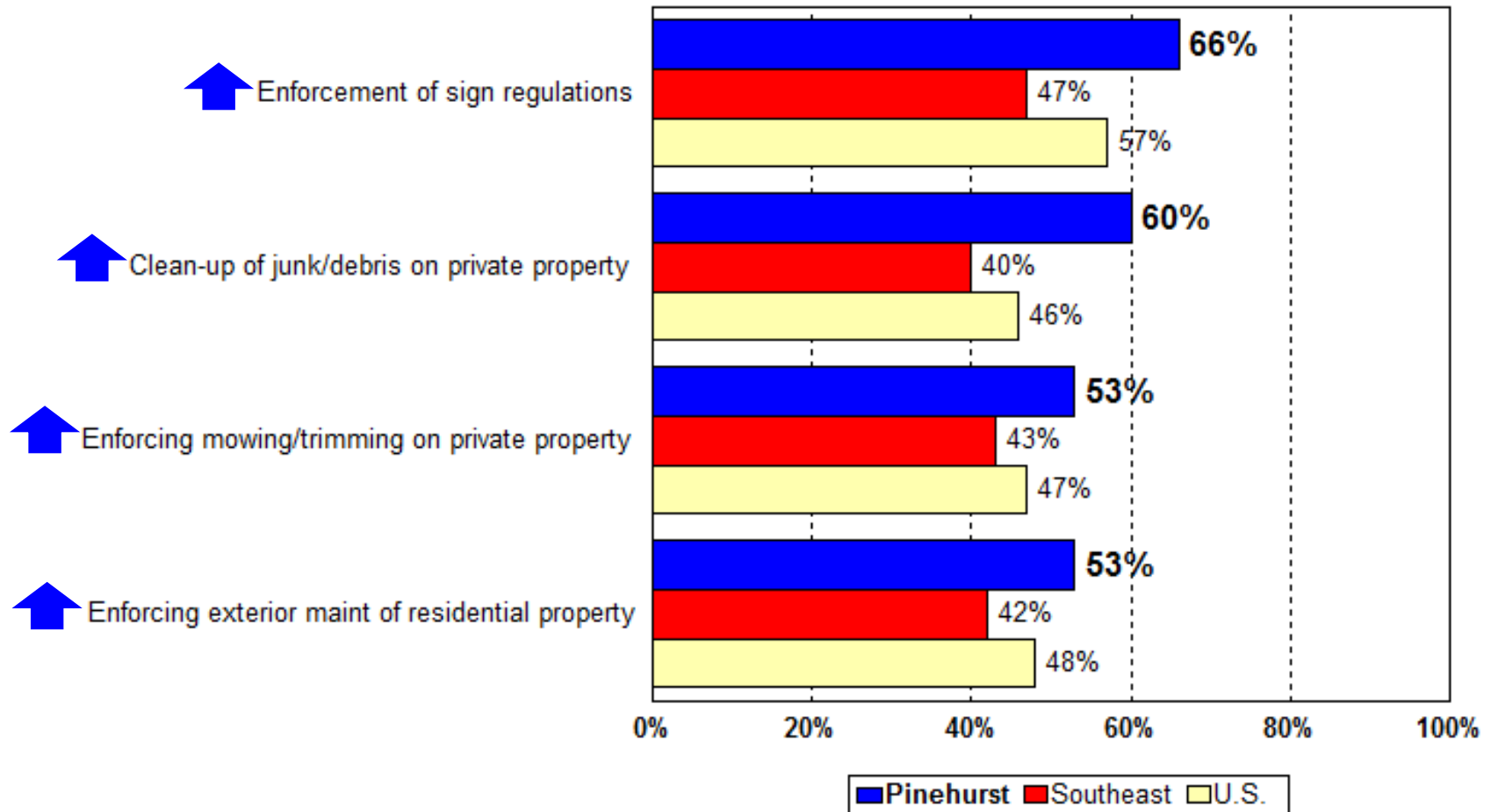
Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Code Enforcement Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

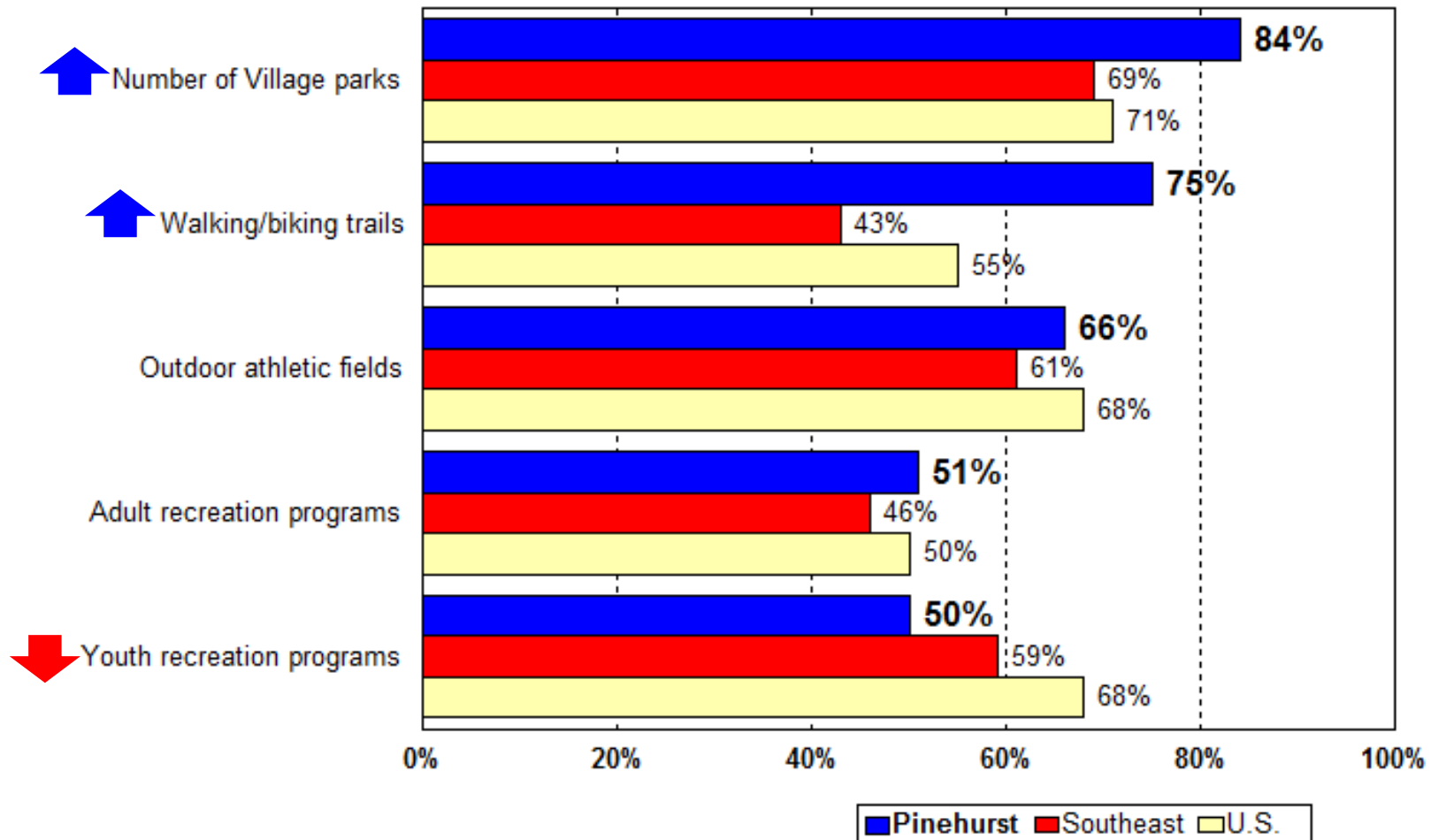
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Parks and Recreation

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

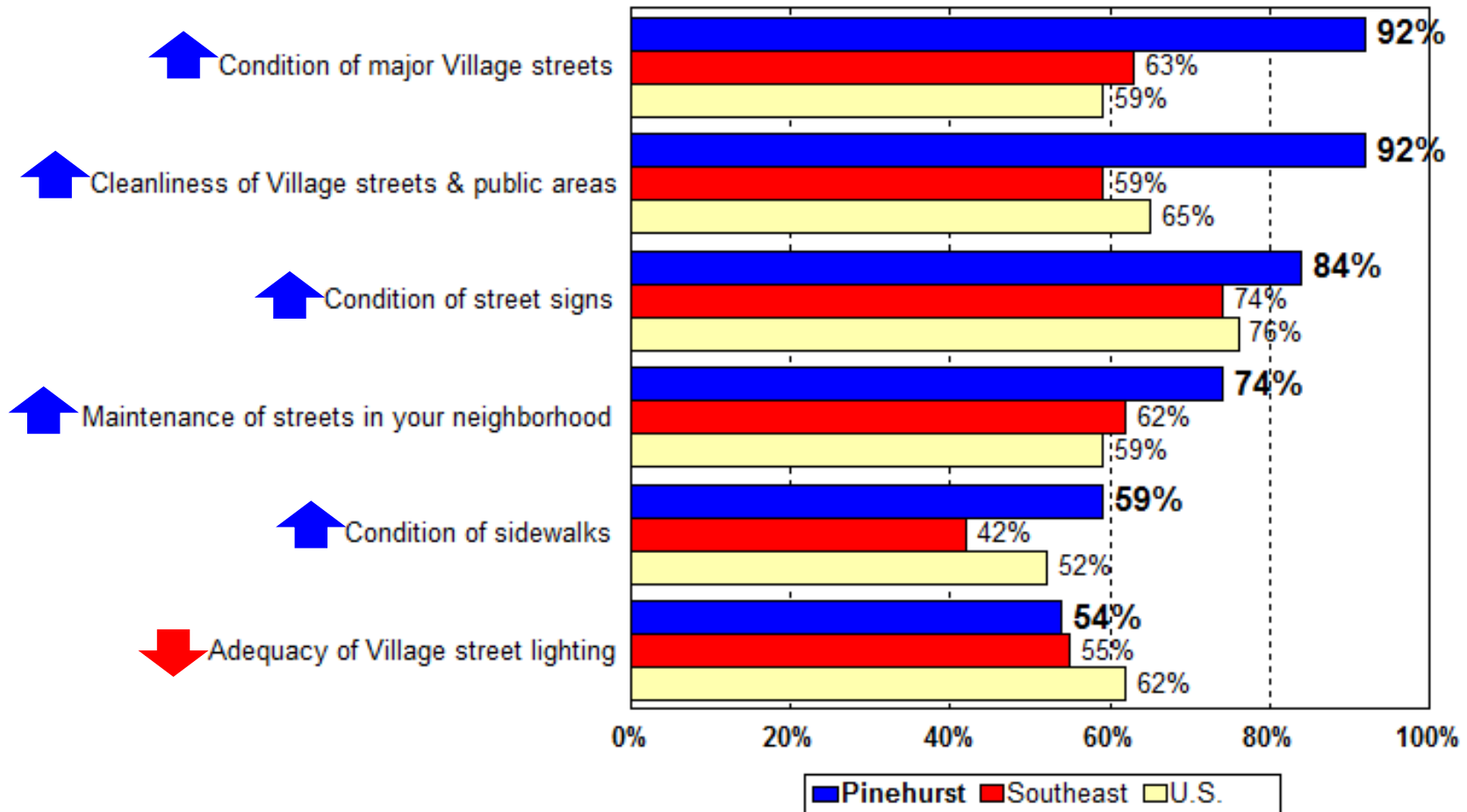
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Maintenance

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

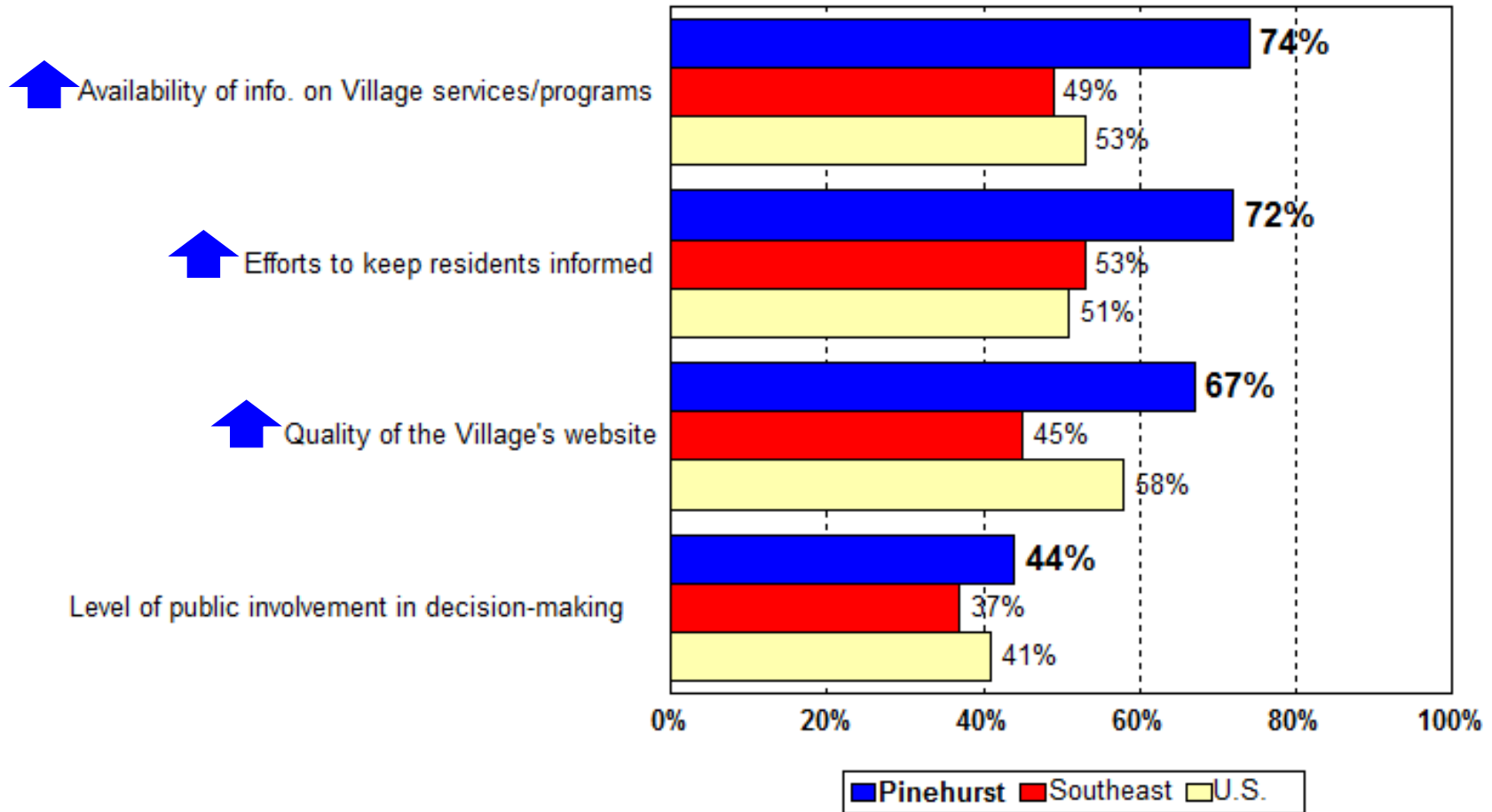
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Communication

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

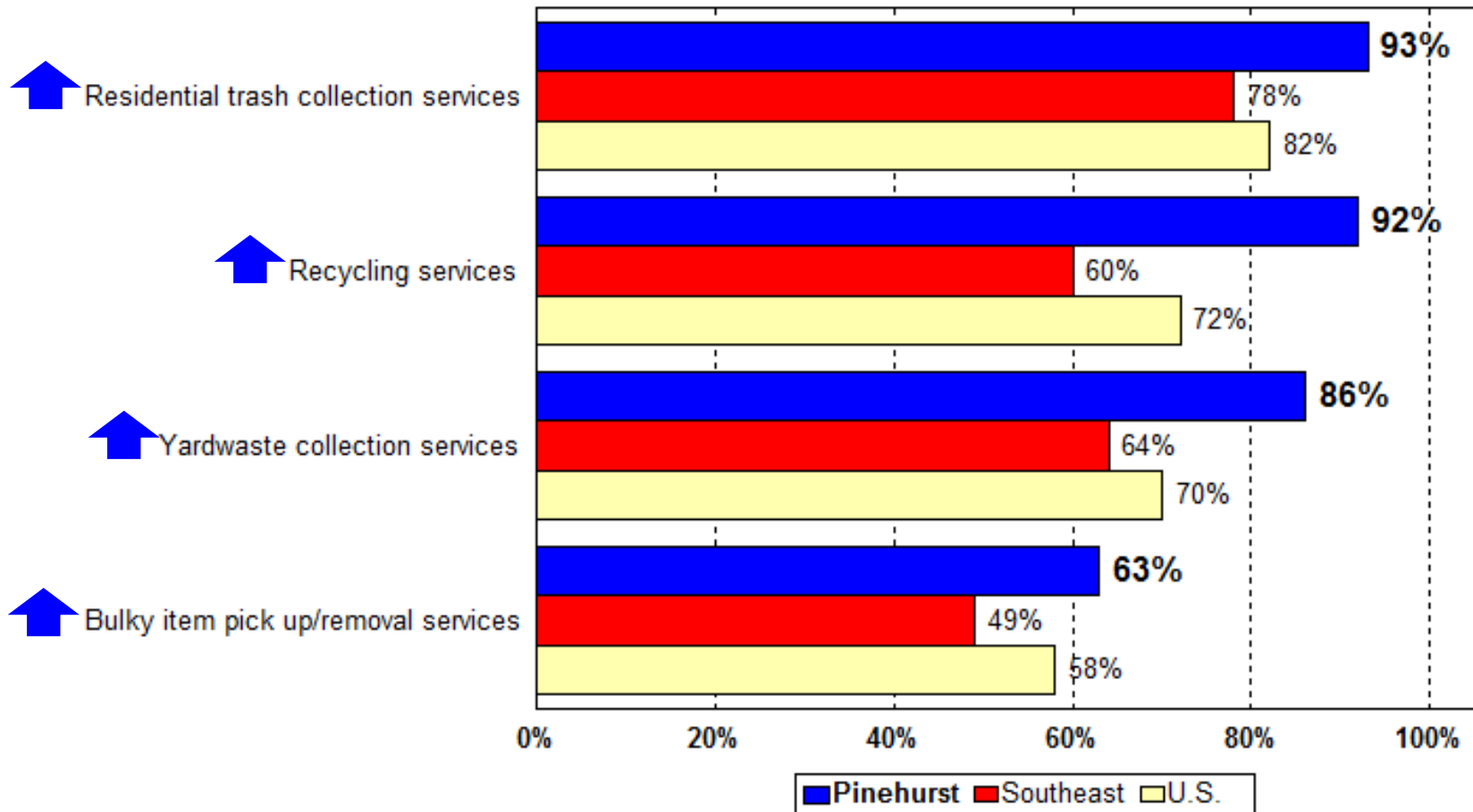
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Utility Services

Pinehurst vs. Southeast vs. the U.S

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Significantly Higher:

Significantly Lower:

Major Finding #4
Priorities for Investment

Importance-Satisfaction Rating

Village of Pinehurst, NC

OVERALL VILLAGE SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10 - .20)</u>						
Efforts at maintaining quality of neighborhoods	43%	1	69%	10	0.1333	1
Enforcement of Village codes & ordinances	31%	3	57%	11	0.1333	2
<u>Medium Priority (IS < .10)</u>						
Street & right-of-way maintenance	29%	4	73%	7	0.0783	3
Parks & recreation facilities	24%	5	74%	6	0.0624	4
Parks & recreation programs	21%	6	72%	8	0.0588	5
Village promotion of natural resource conservation	19%	8	70%	9	0.0570	6
Police services	35%	2	89%	2	0.0385	7
Village communication with residents	18%	9	82%	5	0.0324	8
Fire services	20%	7	93%	1	0.0140	9
Solid waste services	12%	10	89%	3	0.0132	10
Customer service provided by Village employees	6%	11	83%	4	0.0102	11

Overall Priorities: 

Importance-Satisfaction Rating

Village of Pinehurst, NC

PUBLIC SAFETY SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10 -.20)						
Frequency that police patrol your neighborhood	35%	2	68%	5	0.1106	1
Medium Priority (IS <.10)						
Fire prevention & education programs	15%	6	62%	6	0.0572	2
Enforcement of local traffic laws	22%	4	77%	4	0.0502	3
How quickly police respond to emergencies	29%	3	85%	2	0.0423	4
How quickly fire personnel respond to emergencies	19%	5	80%	3	0.0382	5
Village efforts to prevent crimes	50%	1	93%	1	0.0360	6

Public Safety Priorities: 

Importance-Satisfaction Rating

Village of Pinehurst, NC

CULTURAL & RECREATION SERVICES

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10 -.20)</u>						
Availability of recreation indoor facilities	23%	2	37%	13	0.1447	1
Village sponsored cultural arts events	35%	1	63%	6	0.1288	2
Quality of youth recreation programs	21%	4	50%	11	0.1050	3
Quality of recreation indoor facilities	18%	8	42%	12	0.1049	4
<u>Medium Priority (IS <.10)</u>						
Range of amenities at parks & rec facilities	19%	7	55%	9	0.0857	5
Quality of adult recreation programs	17%	10	51%	10	0.0842	6
Availability of info about recreation programs	17%	9	56%	8	0.0750	7
Availability of Walking/Greenway trails	23%	3	75%	3	0.0587	8
Condition of Walking/Greenway trails	21%	6	74%	4	0.0538	9
Quality of Village parks	21%	5	85%	1	0.0321	10
Availability of outdoor athletic fields/facilities	8%	12	60%	7	0.0319	11
Quality of outdoor athletic fields & facilities	8%	13	66%	5	0.0272	12
Number of Village parks	9%	11	84%	2	0.0149	13

Cultural and Recreation Services Priorities:



Importance-Satisfaction Rating

Village of Pinehurst, NC

PUBLIC SERVICES

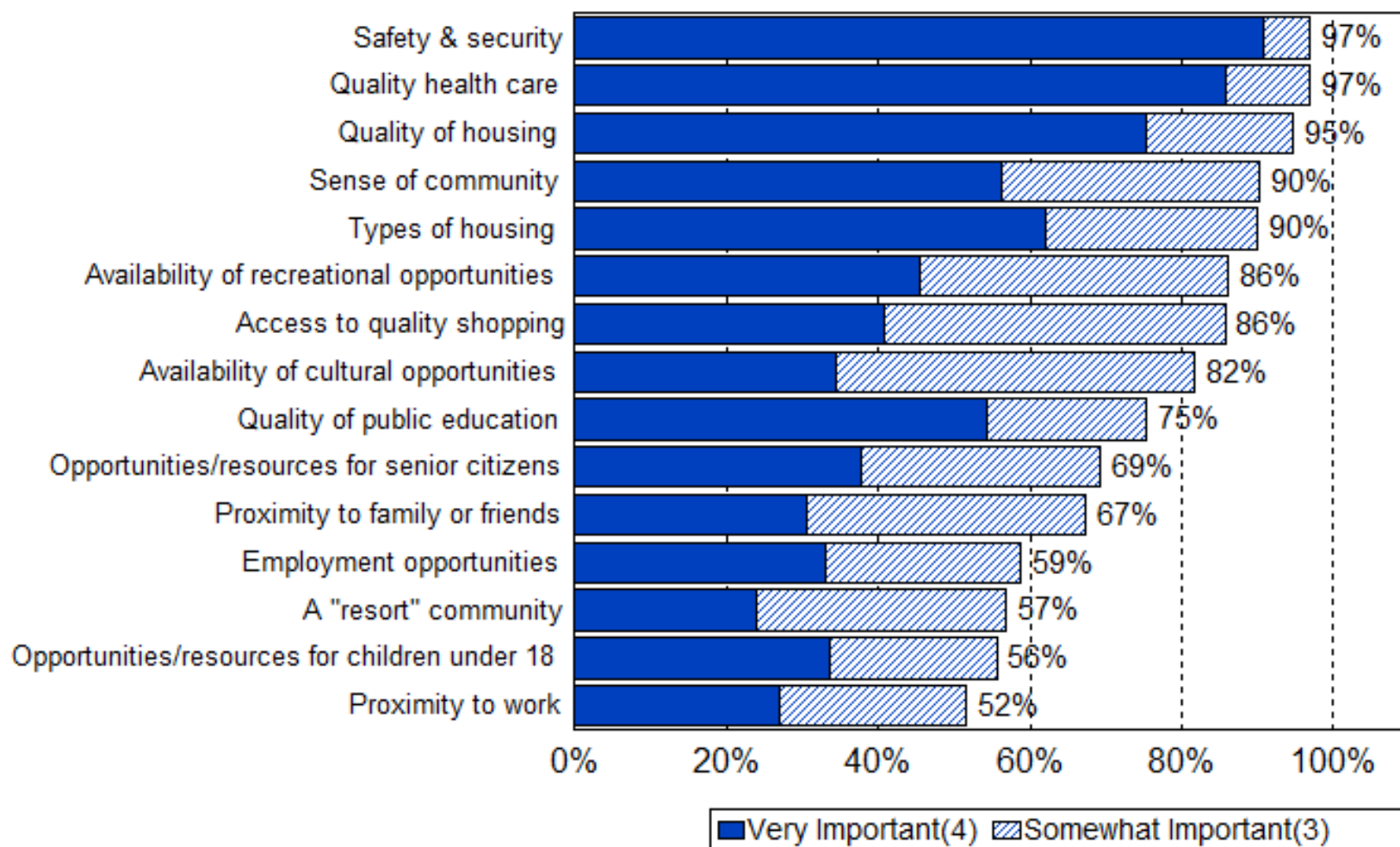
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS >.20)</u>						
Availability of sidewalks	47%	1	43%	10	0.2688	1
<u>High Priority (IS .10 - .20)</u>						
Adequacy of street lighting	43%	2	54%	9	0.1987	2
<u>Medium Priority (IS <.10)</u>						
Quality of stormwater runoff/management system	23%	4	59%	8	0.0952	3
Maintenance of streets in your neighborhood	34%	3	74%	6	0.0901	4
Condition of sidewalks	14%	9	59%	7	0.0580	5
Maintenance of street signs/pavement markings	11%	10	84%	5	0.0180	6
Landscaping in medians & other public areas	18%	8	90%	4	0.0180	7
Maintenance of main Village street thoroughfares	20%	6	92%	2	0.0166	8
Overall cleanliness of streets & other public areas	21%	5	92%	1	0.0166	9
Maintenance/preservation of Downtown	19%	7	92%	3	0.0160	10

Public Services Priorities:

Other Findings

Q3a. Level of Importance of Various Reasons for Choosing to Live in Pinehurst

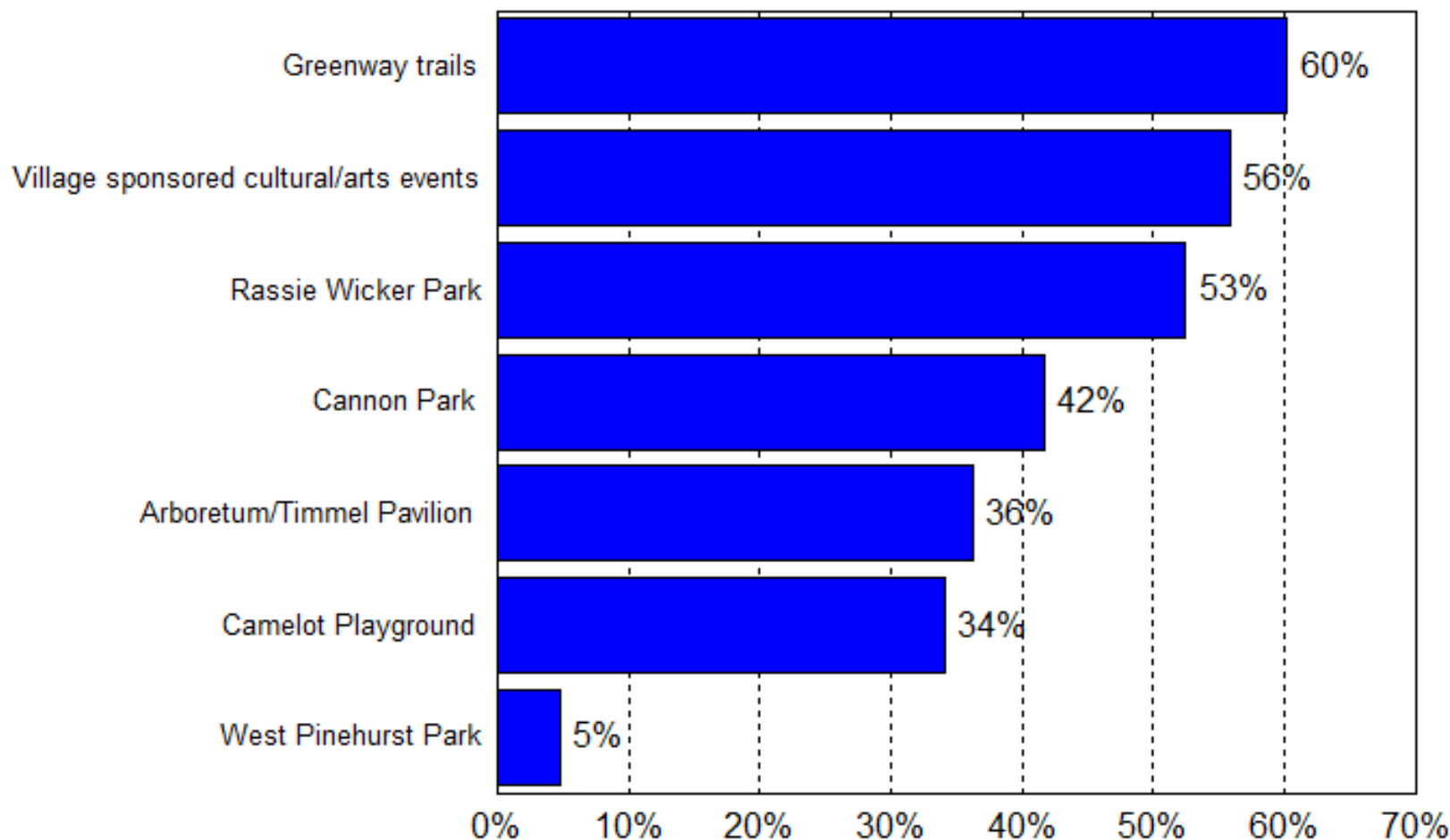
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Q10. Parks and Recreation Programs and Facilities That Residents Have Used During the Past Year

by percentage of respondents (multiple choices could be made)

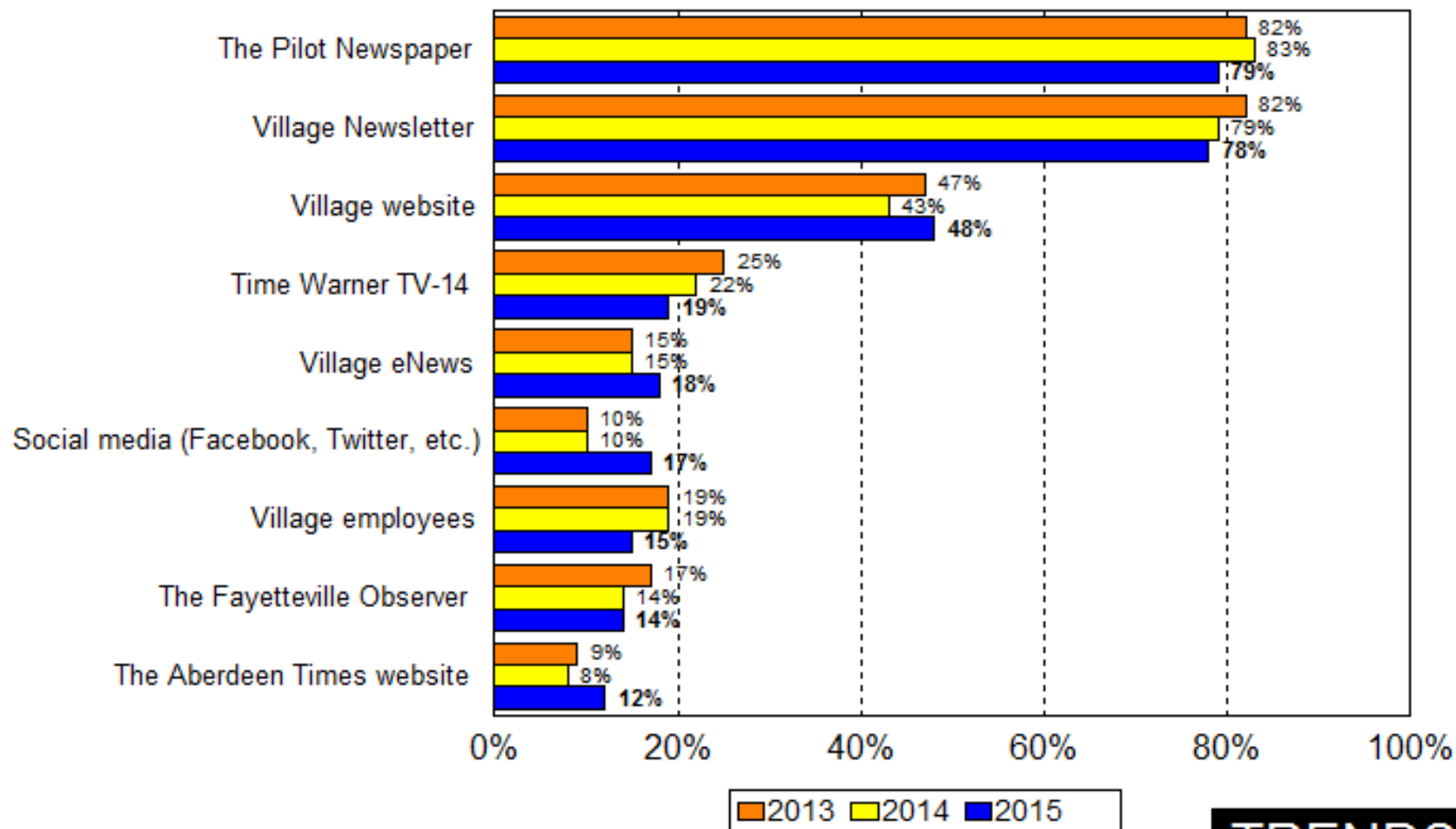


Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

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

- 2013, 2014 & 2015

by percentage of respondents (multiple selections could be made)

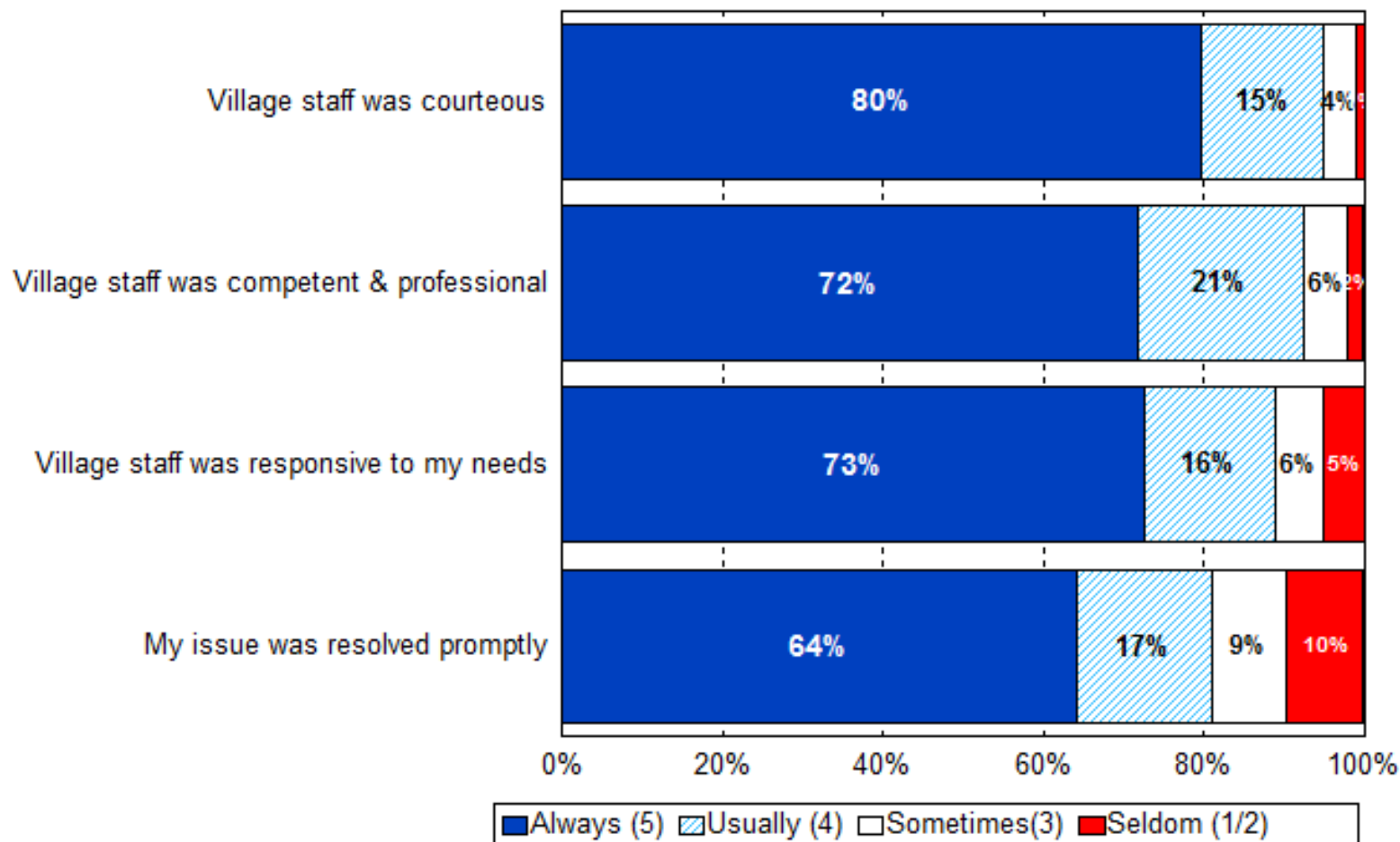


Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

TRENDS

Q21a-d. Satisfaction with Experience Interacting with Village Employees

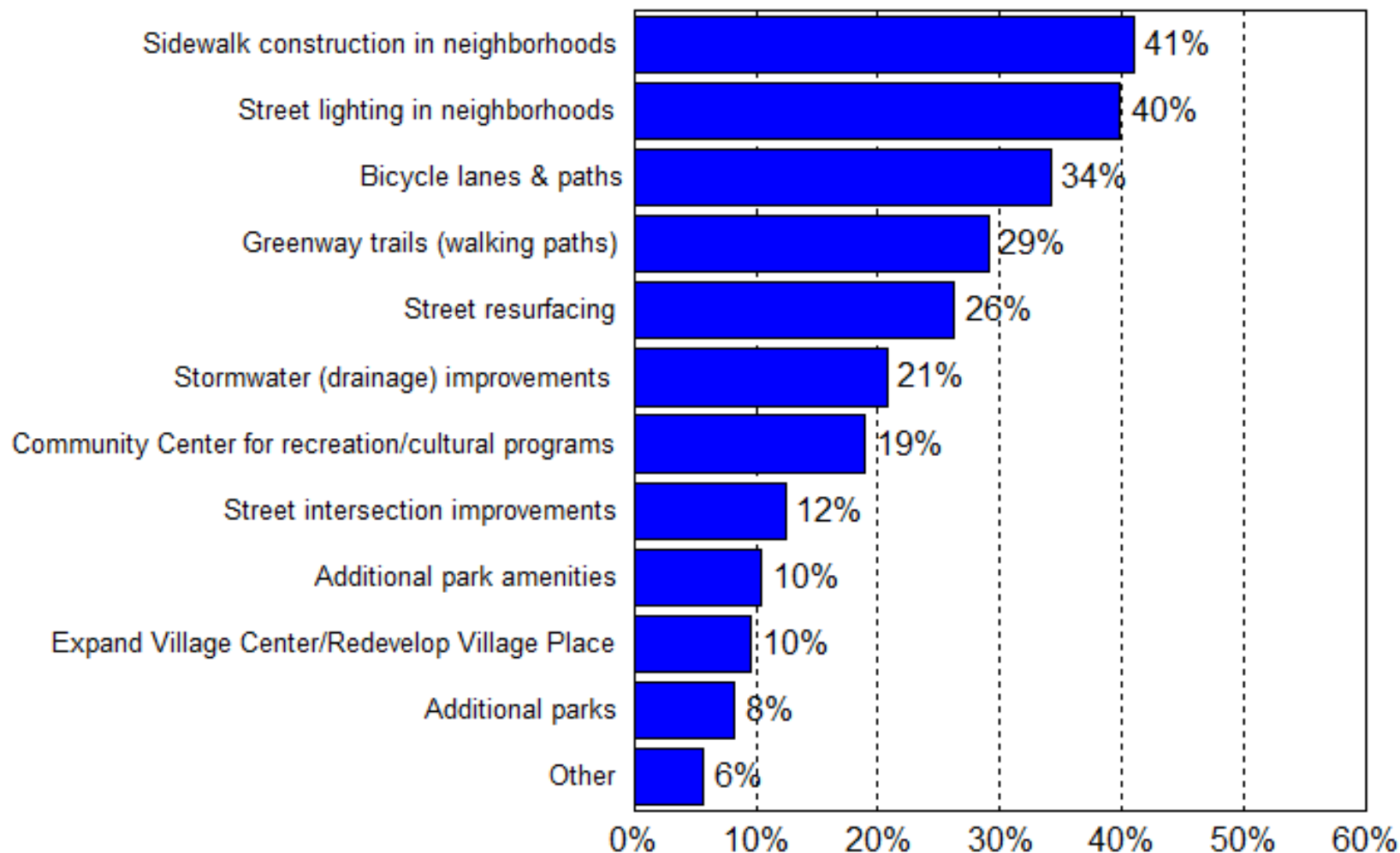
by percentage of respondents who have contacted the Village in the past year, and rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Q22. Capital Improvements That Residents Feel Are the Most Important

by percentage of respondents (3 selections could be made)



Source: ETC Institute DirectionFinder (2015 - Pinehurst, NC)

Summary

- **Residents Have a Very Positive Perception of the Village**
 - ❑ 97% would recommend Pinehurst to others as a place to live
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 55 of 87 areas that were rated since 2014
- **Pinehurst is Setting the Standard for Service Delivery Compared to Other Communities**
 - ❑ The Village rated above the National Average in 39 of the 44 areas that were compared
 - ❑ The Village rated significantly above the National Average in 37 of the 44 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Enforcement of Village codes and ordinances
 - ❑ Efforts at maintaining the quality of neighborhoods

Questions?

THANK YOU!!