

2016 Community Survey

Village of Pinehurst, NC

Presented by

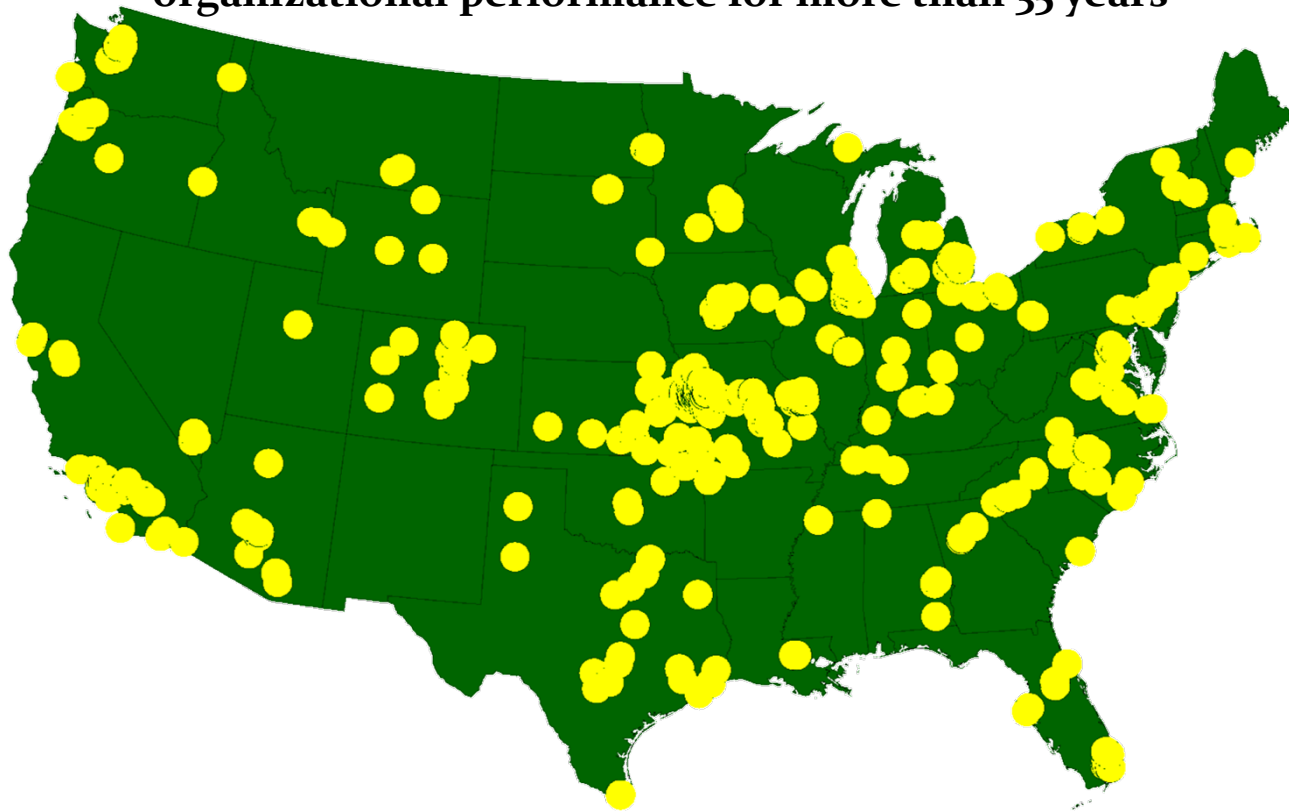


September 2016

ETC Institute

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More than 2,100,000 Persons Surveyed Since 2006
for more than 800 cities in 49 States

Purpose

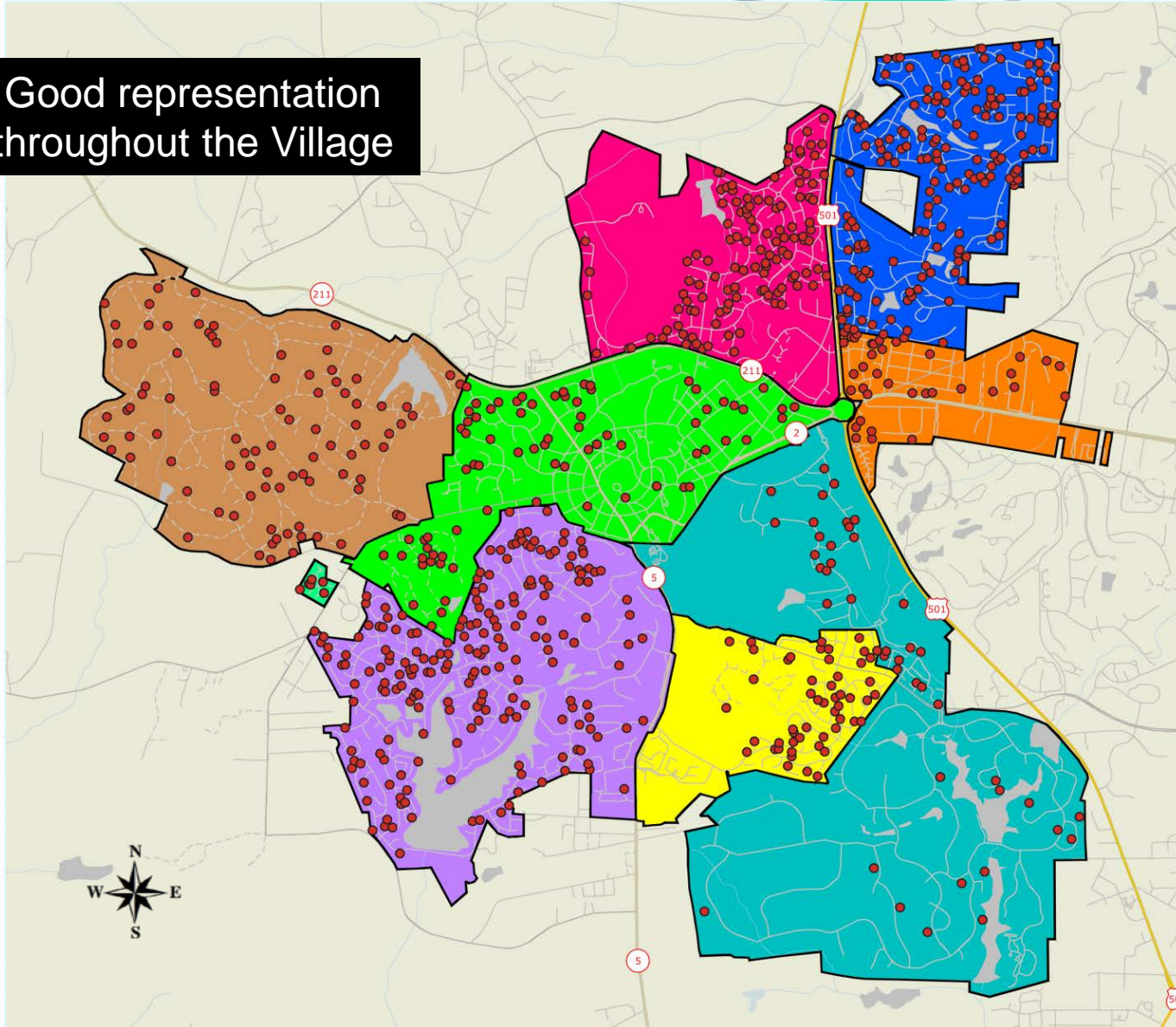
- **To objectively assess citizen satisfaction with the delivery of major Village services**
- **To measure trends from previous surveys**
- **To compare the Village's performance with residents regionally and nationally**
- **To help determine priorities for the community**

Methodology

- **Survey Description**
 - ❑ seven-page survey
 - ❑ fifth Community 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:** 793 completed surveys
- **Confidence level:** 95%
- **Margin of error:** +/- 3.5% overall

Location of Survey Respondents

Good representation throughout the Village



Village of Pinehurst 2016 Community Survey

Bottom Line Up Front

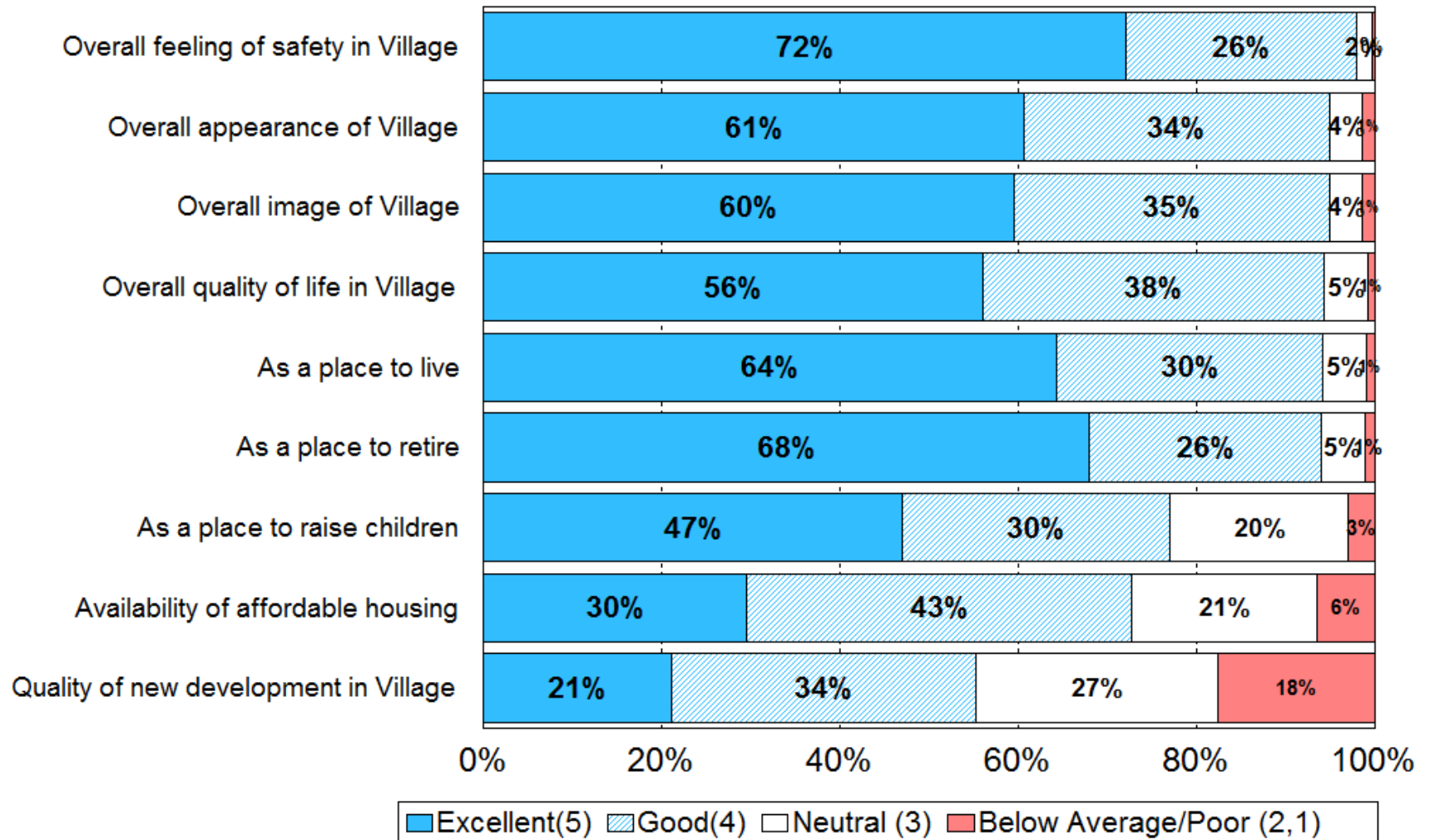
- **Residents Have a Very Positive Perception of the Village**
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
 - ❑ 94% would recommend Pinehurst to others as a place to live
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 63 of 86 areas since 2015; increased or stayed the same in 72 of 81 areas since 2013
- **Satisfaction with Village Services is Much Higher in Pinehurst Than Other Communities**
 - ❑ The Village rated above the Southeast Regional Average in 45 of 47 areas, and above the U.S. Average in 44 of the 47 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Level of public involvement in local decisions
 - ❑ Enforcement of Village codes and ordinances

Major Finding #1

Residents Have a Very Positive
Perception of the Village

Q4. Perception Residents Have of Pinehurst as a Community

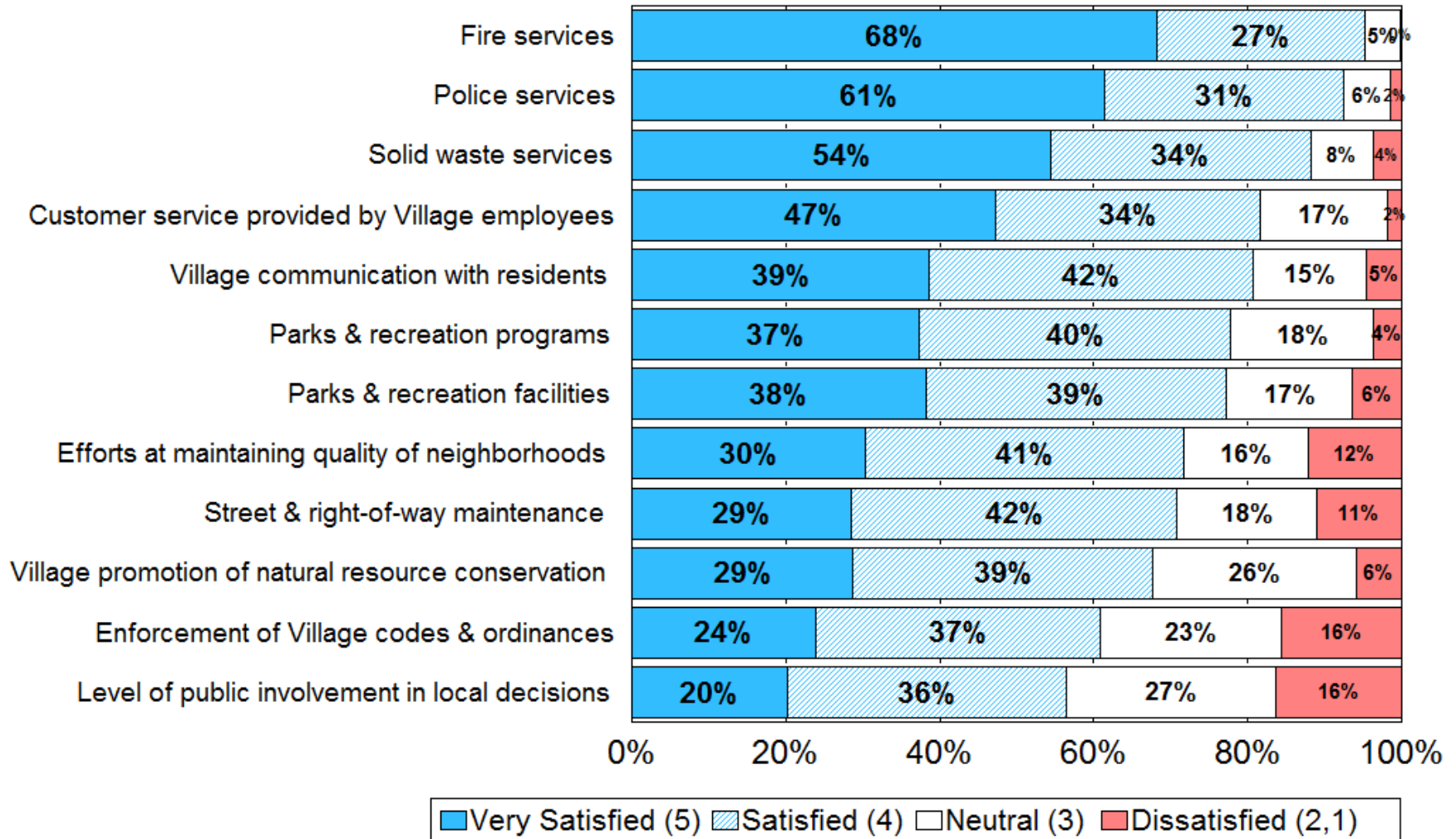
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")



Residents Have a Very Positive Perception of the Community in All Areas

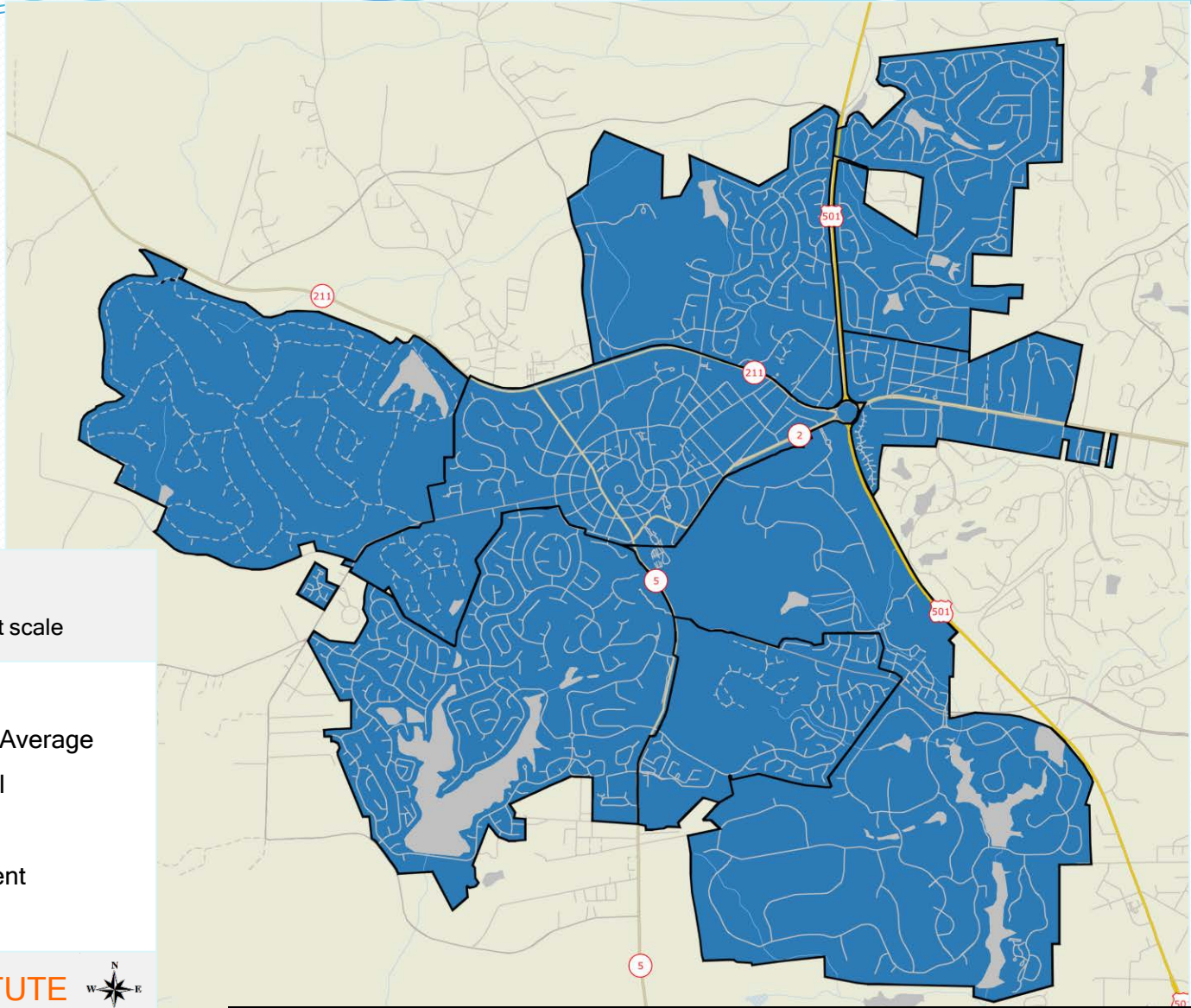
Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category

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



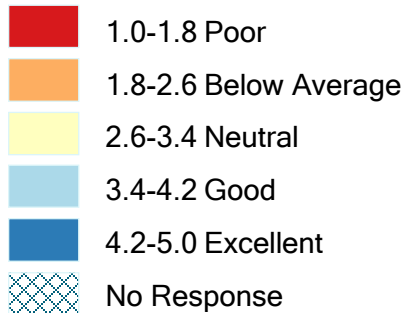
Less Than 20% of Residents Were Dissatisfied with Any of the Major Categories of Village Services Rated

Overall Quality of Life in the Village



Perception

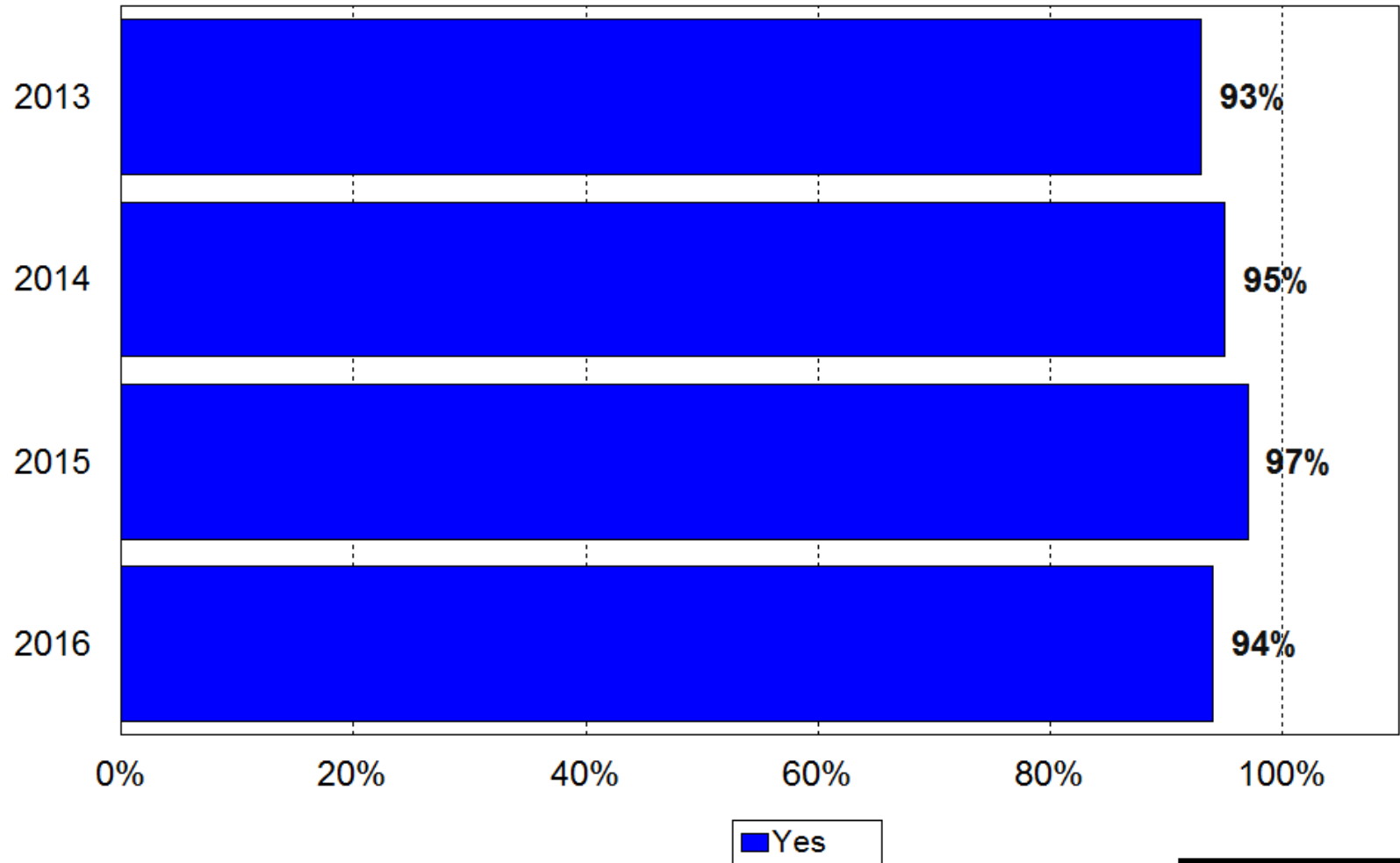
Mean rating on a 5-point scale



All areas are in BLUE, indicating that residents in all parts of the Village rated the overall quality of life as excellent

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

by percentage of respondents



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

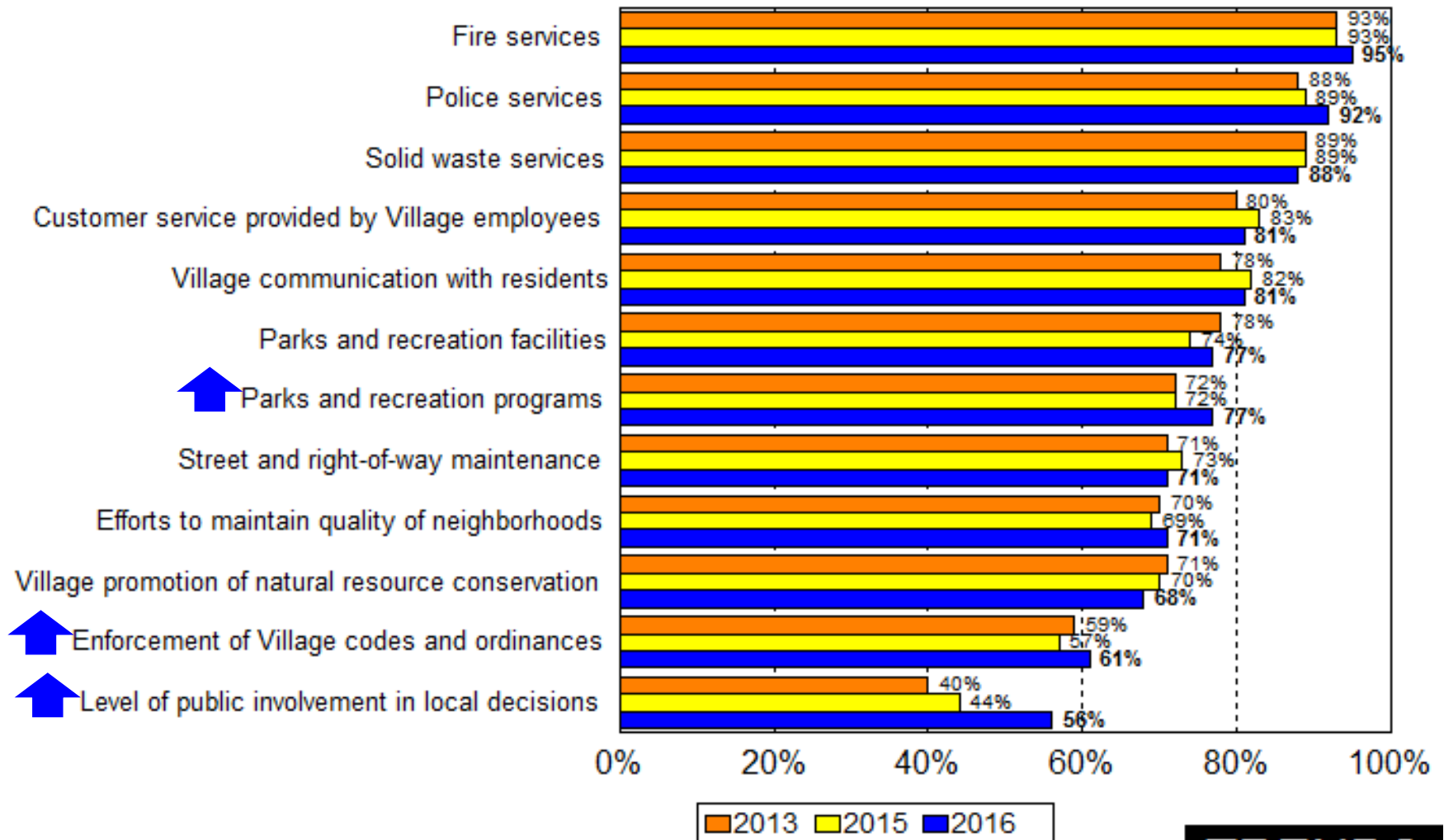
94% of residents would recommend Pinehurst to other as a place to live

Major Finding #2

Satisfaction Ratings Have Increased in Most Areas Both Short-Term and Long-Term

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2013, 2015 & 2016

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



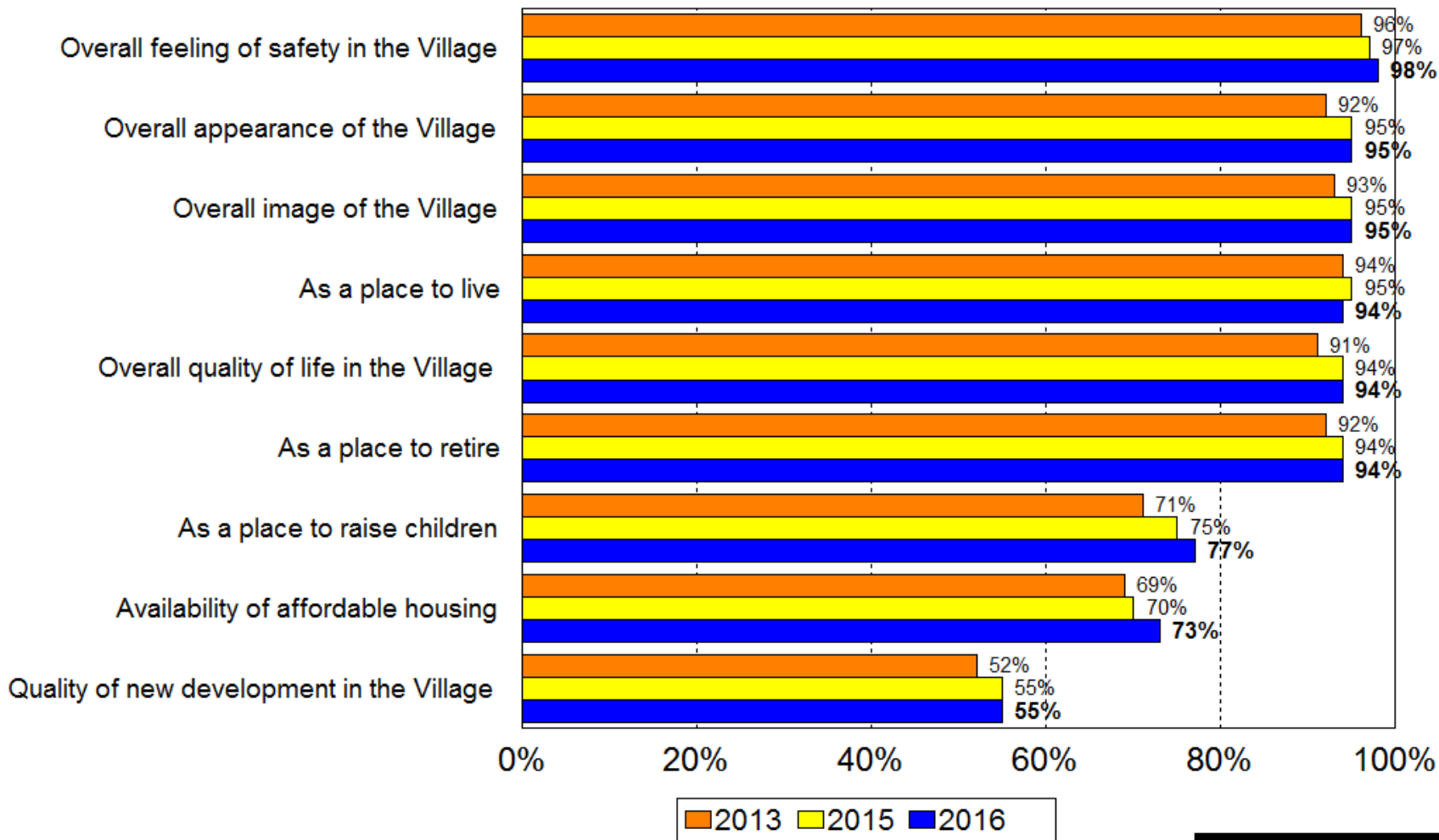
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Q4. Perception Residents Have of Pinehurst as a Community - 2013, 2015 & 2016

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



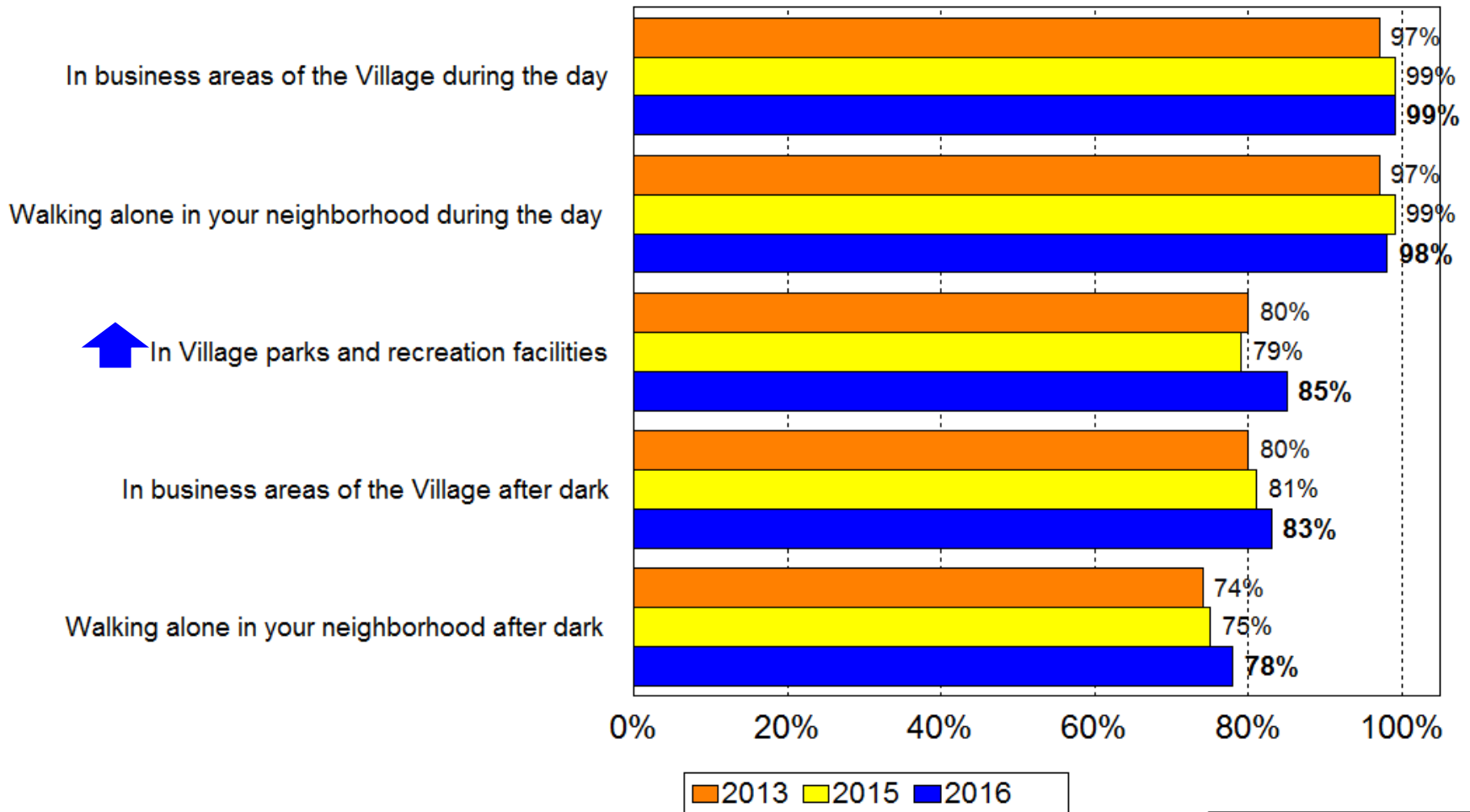
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Q5. Perceptions of Safety and Security in Pinehurst - 2013, 2015 & 2016

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



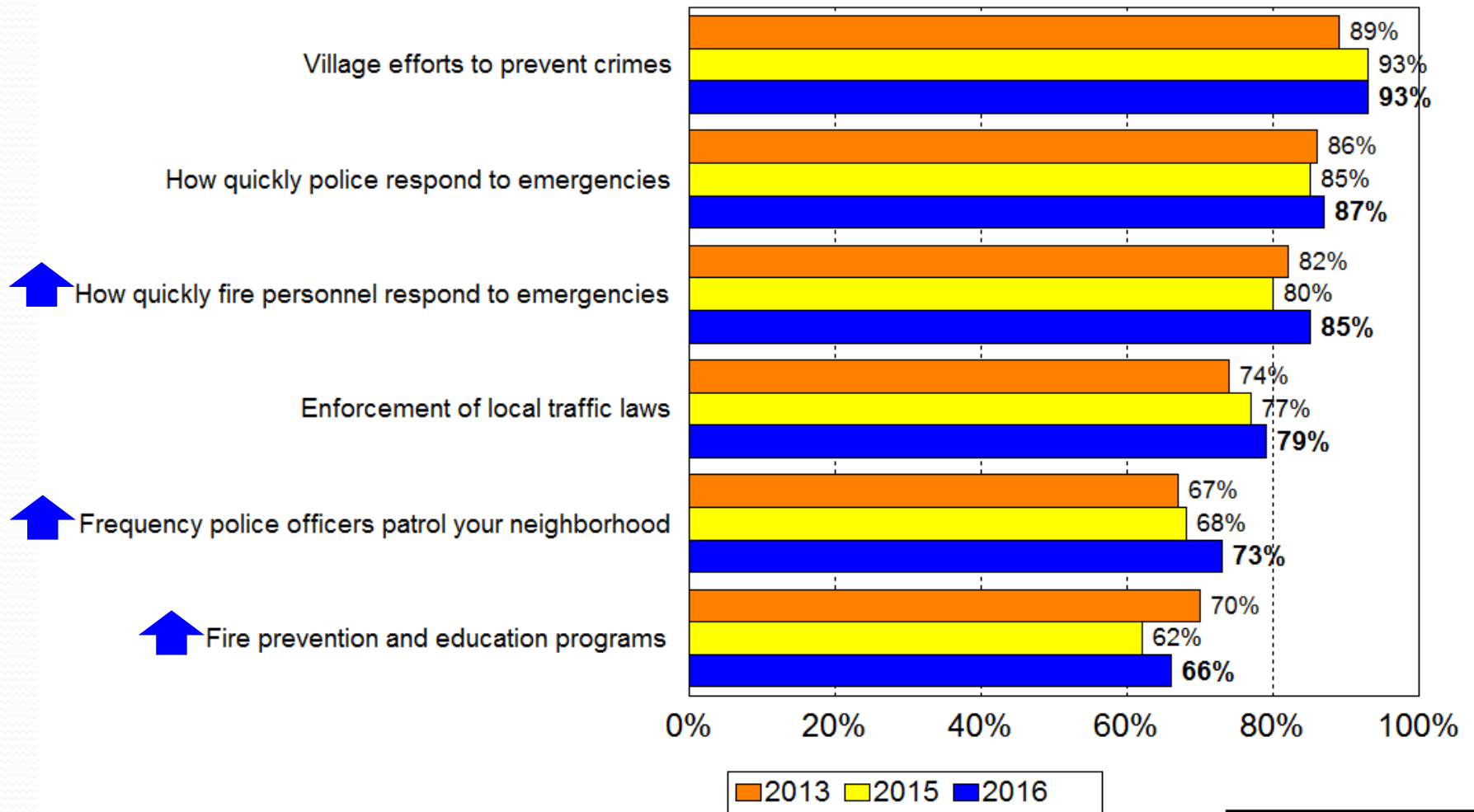
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: **↑** **Significant Decreases From 2015:** **↓**

Q6. Satisfaction with Various Aspects of Public Safety 2013, 2015 & 2016

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



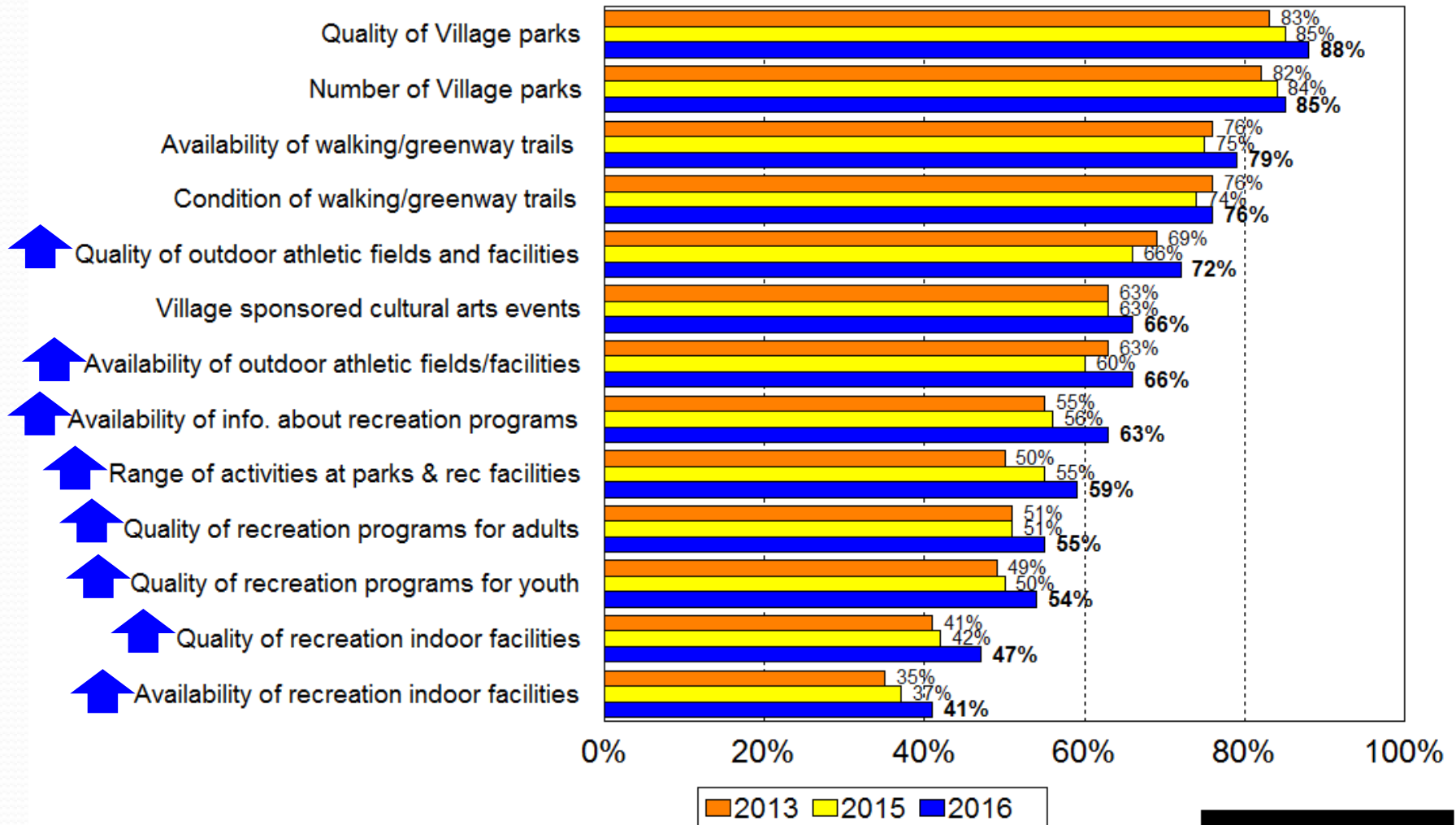
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Q8. Satisfaction with Various Aspects of Cultural and Recreation Services - 2013, 2015 & 2016

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



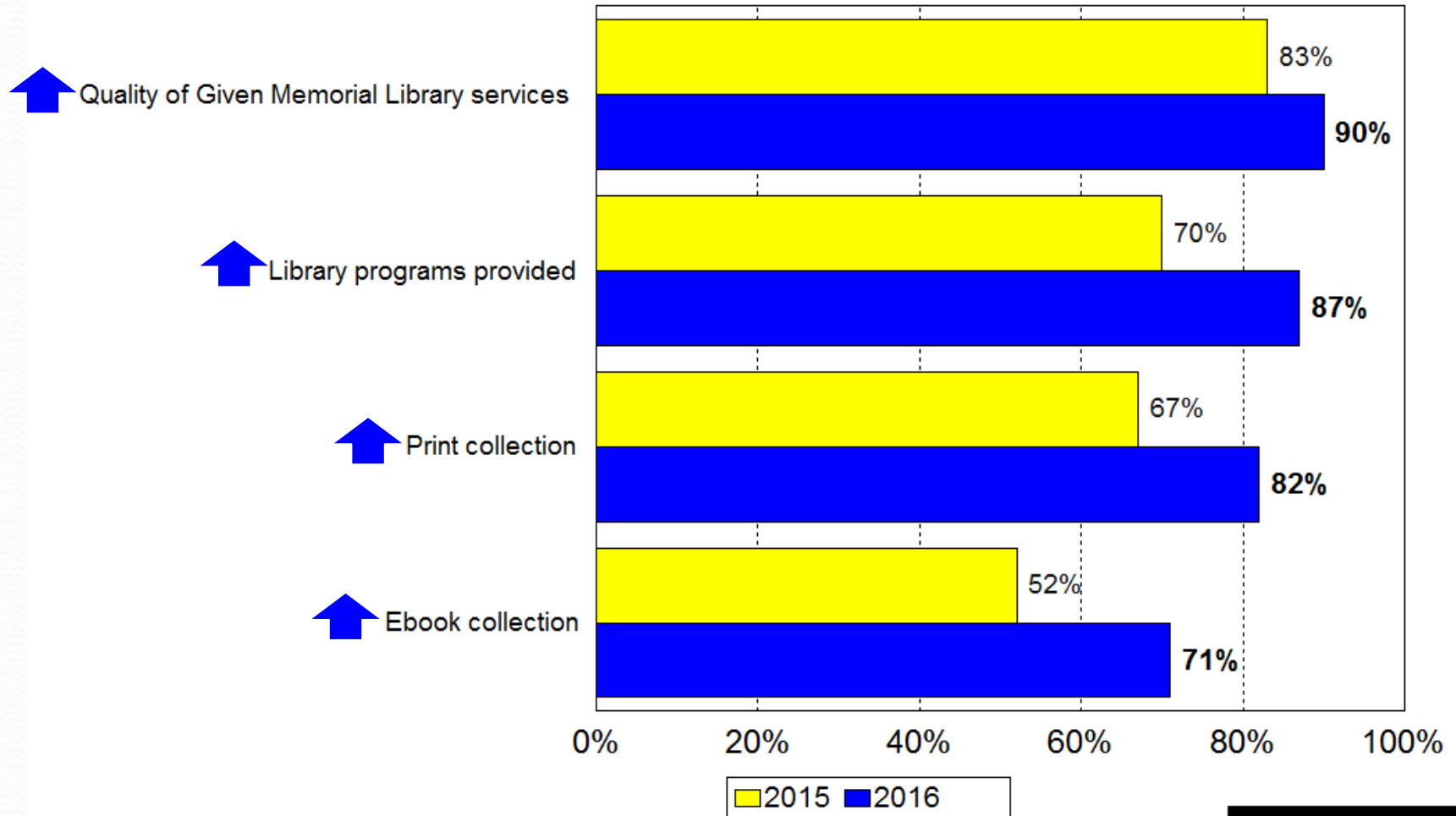
TRENDS

Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Q11b. Satisfaction with Various Aspects of the Given Memorial Library - 2015 & 2016

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



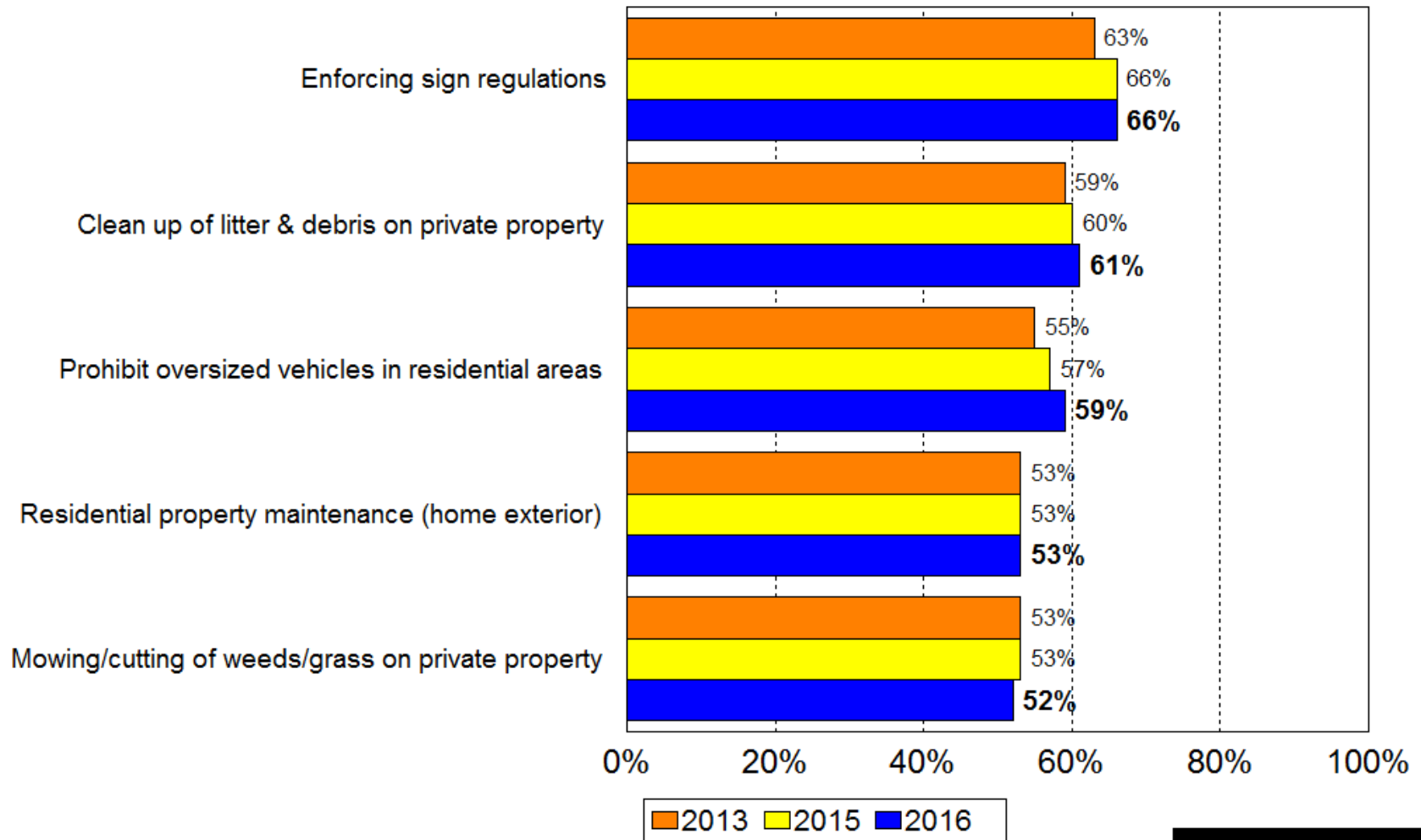
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Q12. Satisfaction with Various Aspects of Community Development - 2013, 2015 & 2016

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



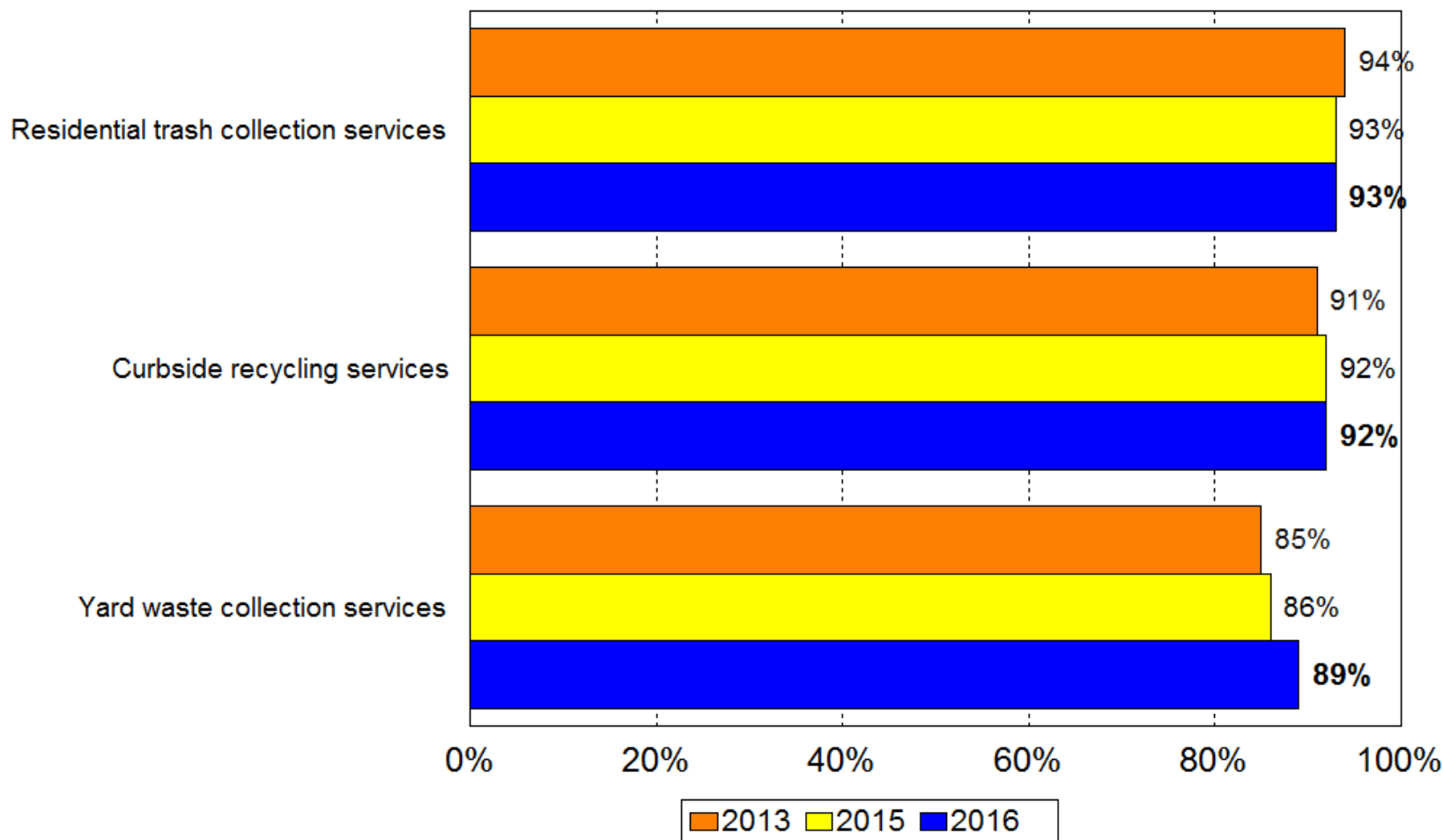
TRENDS

Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Significant Increases From 2015:  **Significant Decreases From 2015:** 

Q14. Satisfaction with Solid Waste Services - 2013, 2015 & 2016

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



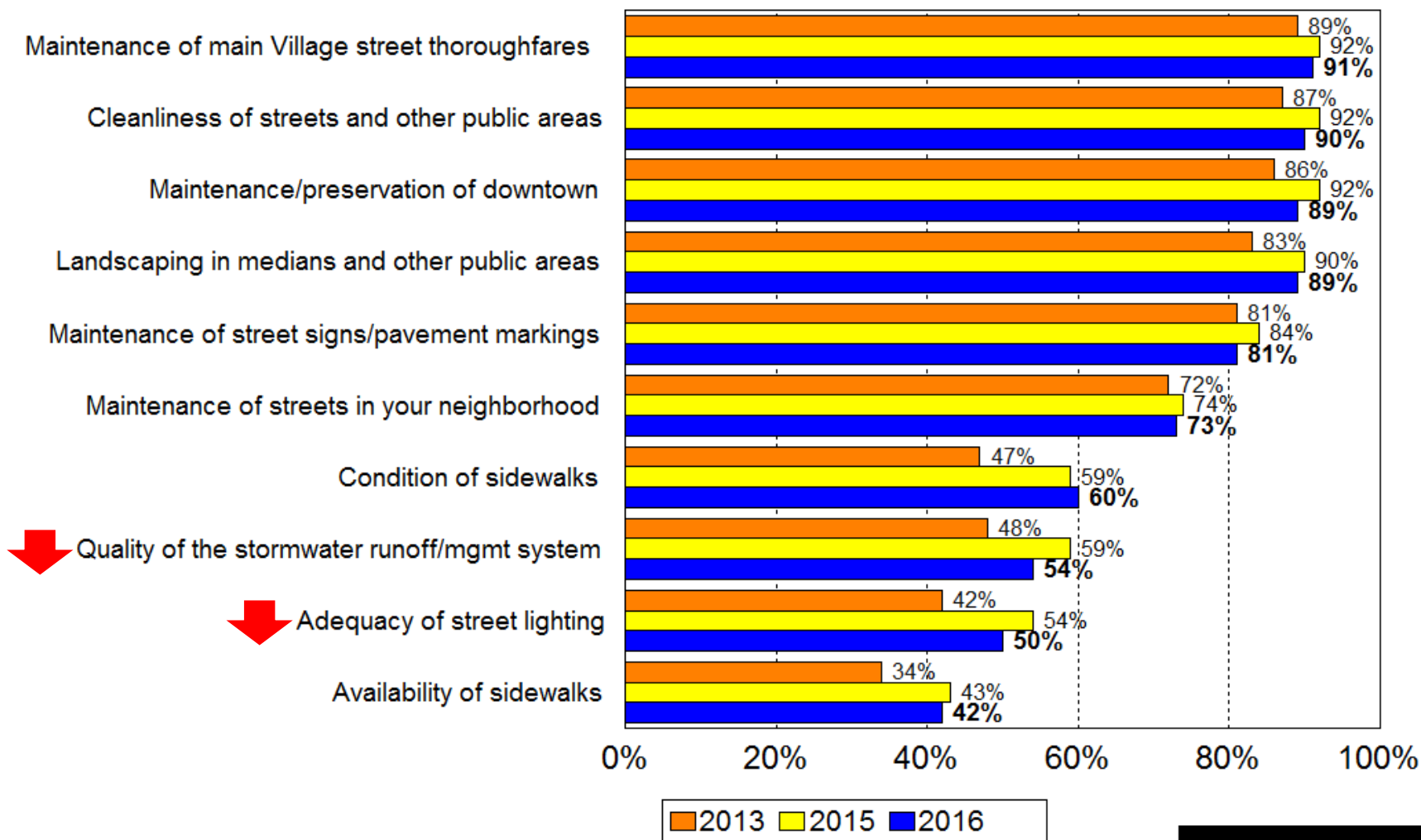
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015:  **Significant Decreases From 2015:** 

Q15. Satisfaction with Various Aspect of Public Services - 2013, 2015 & 2016

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



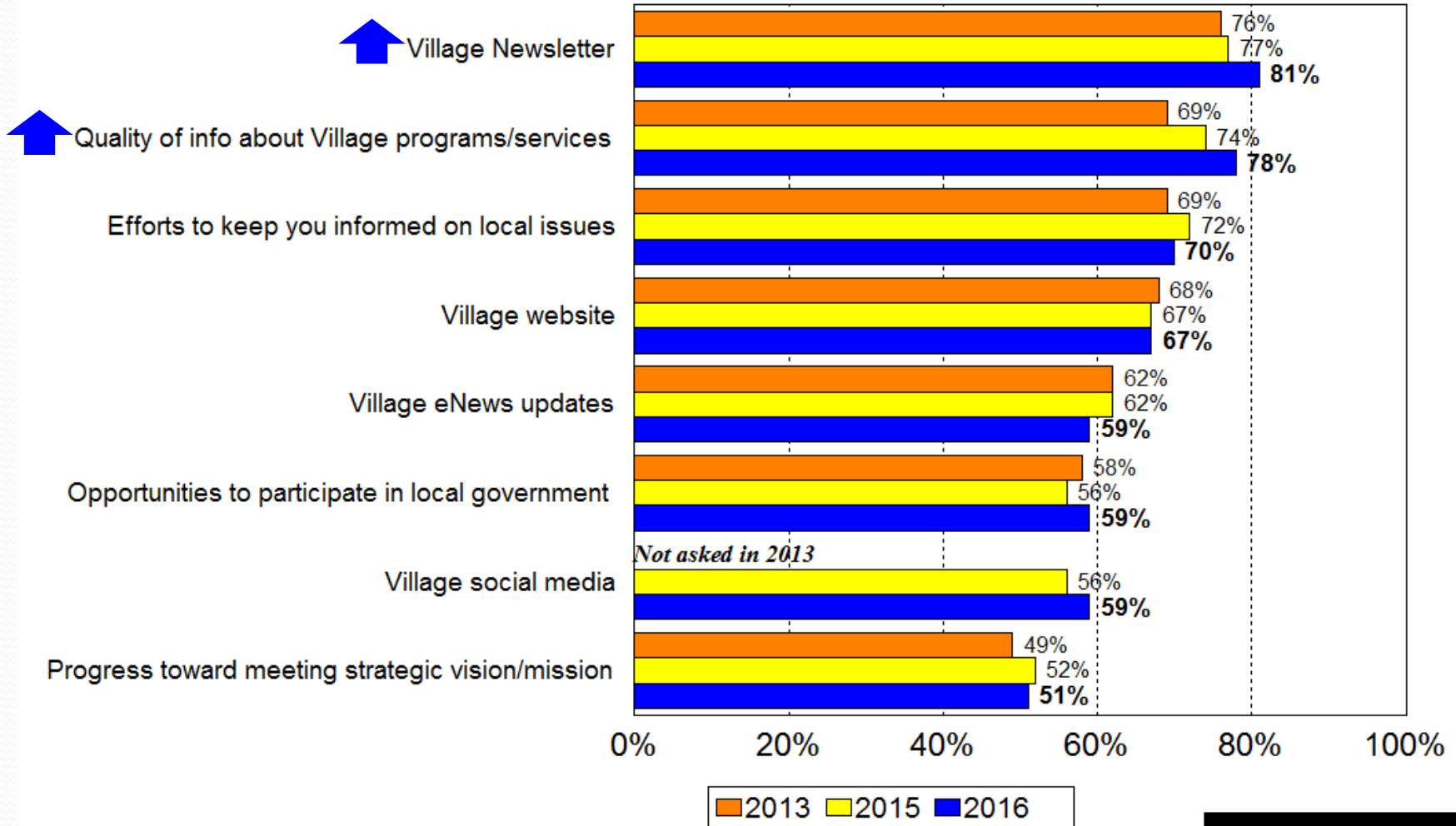
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Significant Increases From 2015: Significant Decreases From 2015:

Q18. Satisfaction with Public Communication and Outreach - 2013, 2015 & 2016

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 (2016 - Pinehurst, NC)

TRENDS

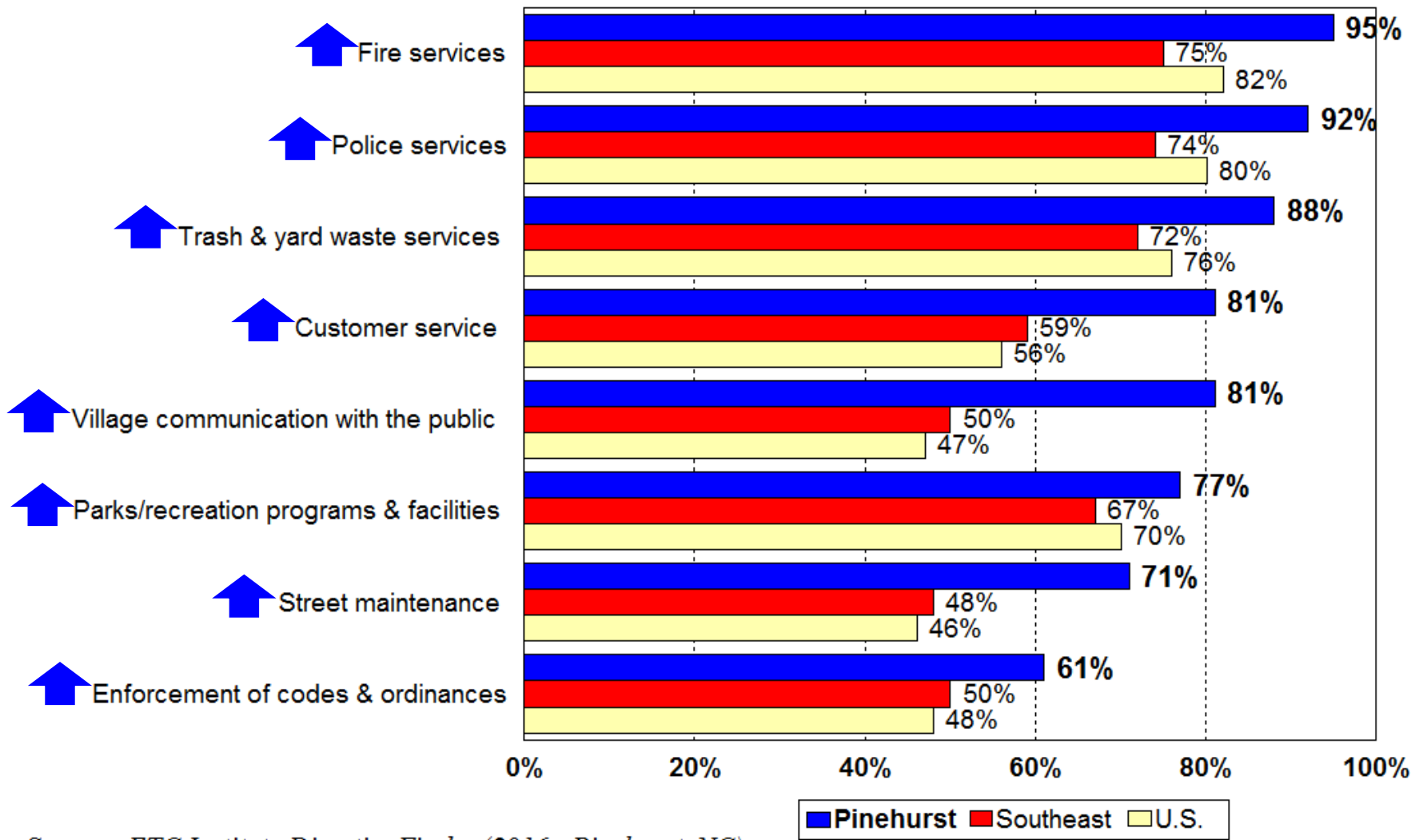
Significant Increases From 2015: ↑ **Significant Decreases From 2015:** ↓

Major Finding #3

**Satisfaction with Village Services
Is Significantly Higher in
Pinehurst Than in 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 no opinion)



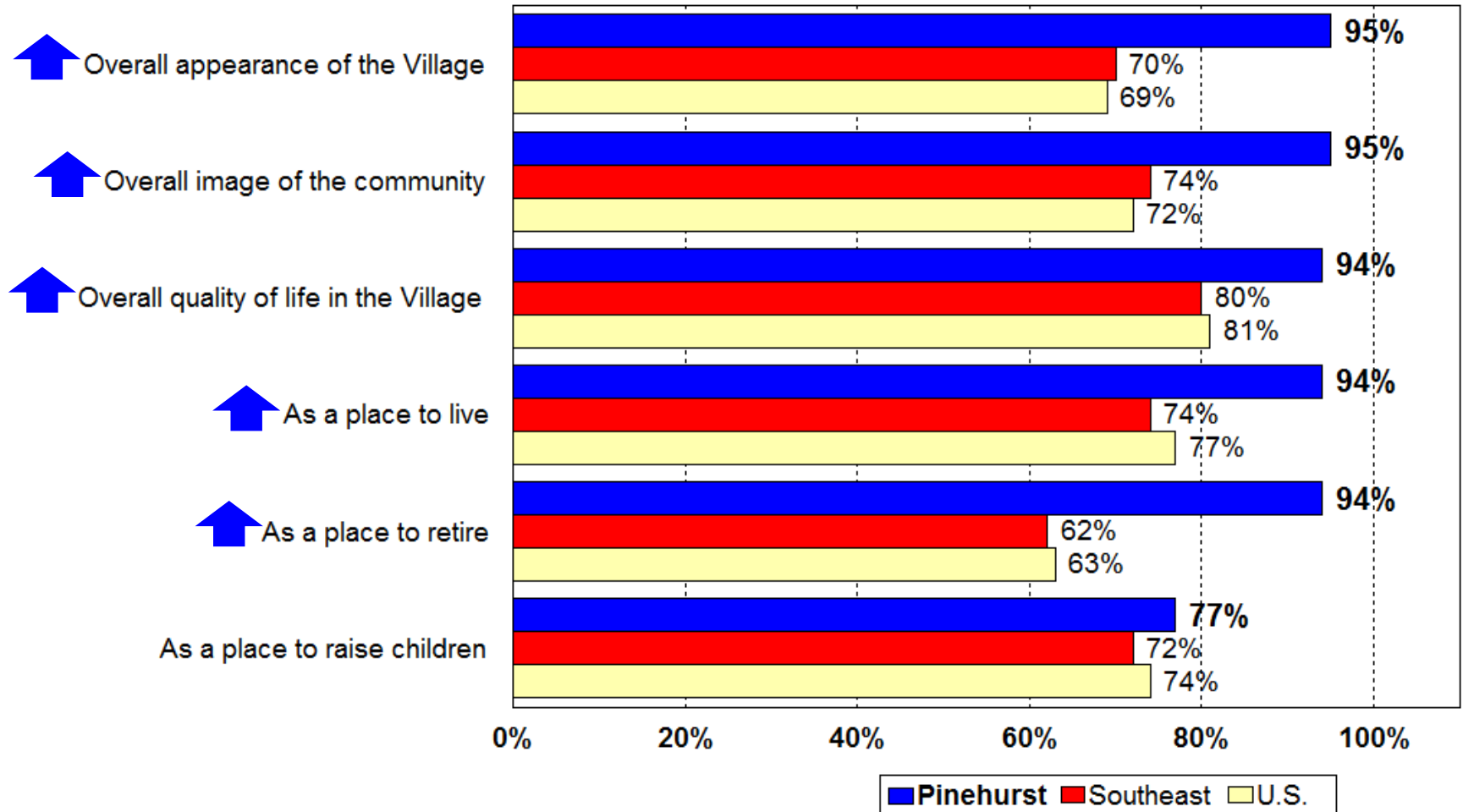
Source: ETC Institute, Direction Finder (2016, Pinehurst, NC)

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 no opinion)



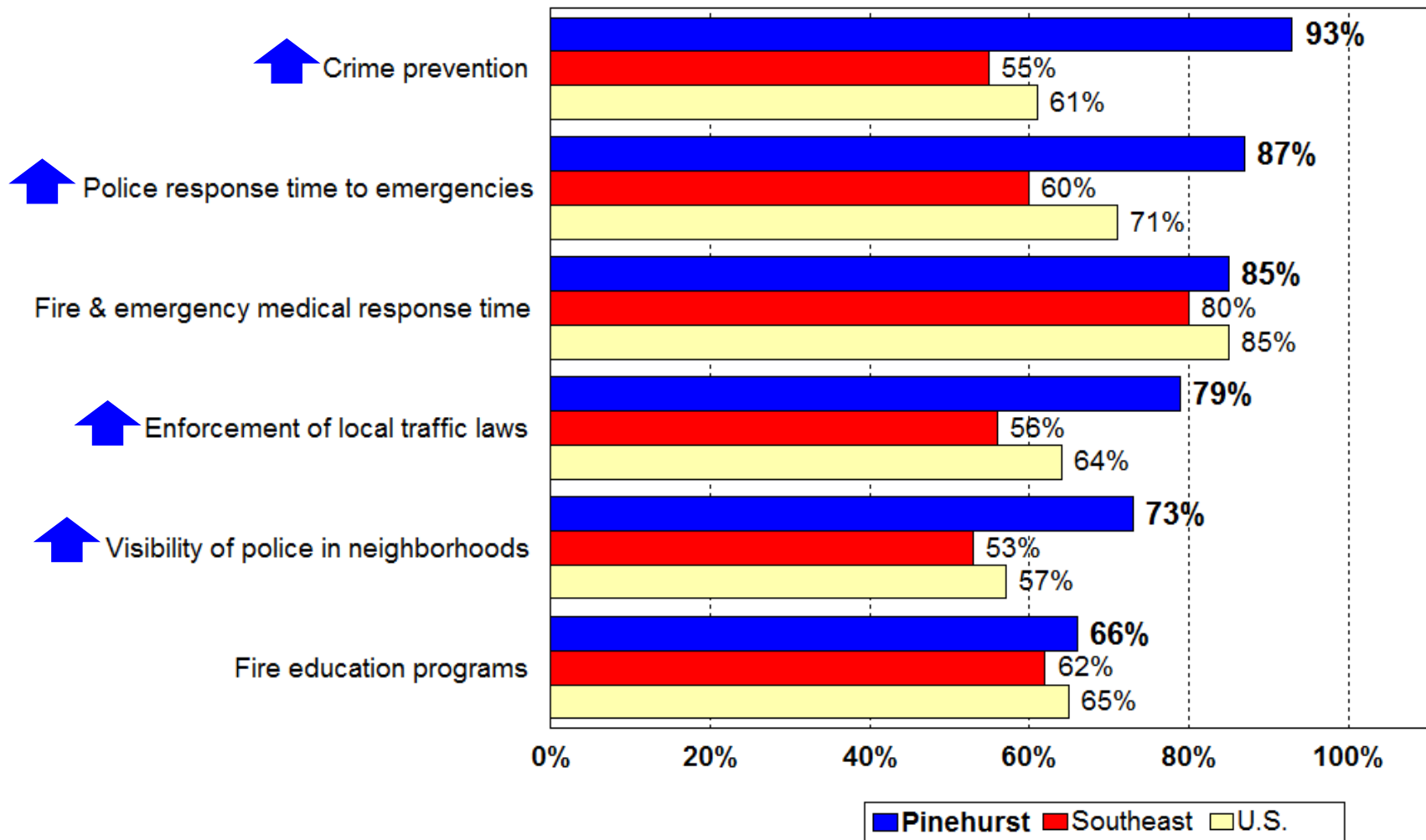
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Public Safety 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 no opinion)



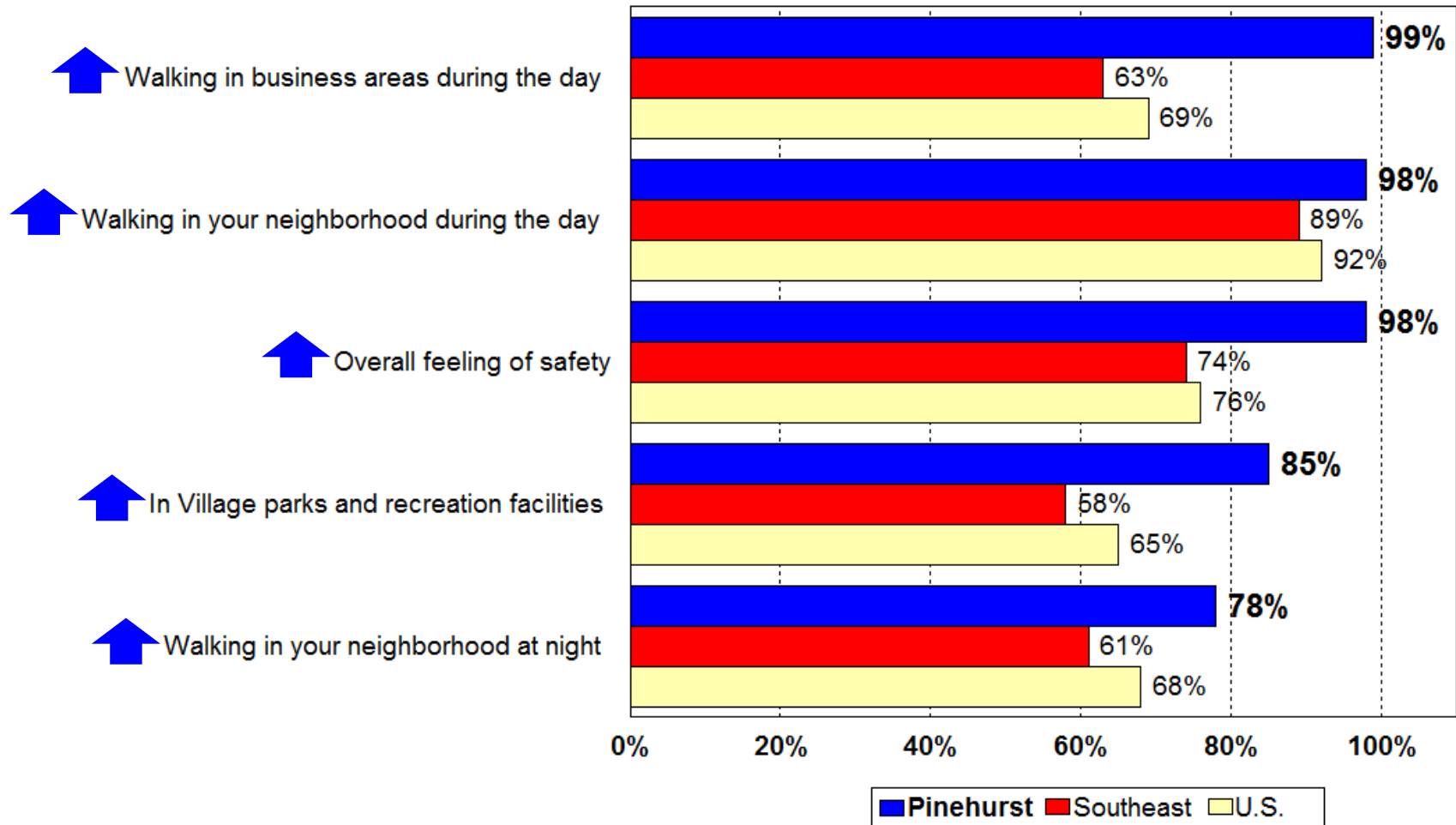
Significantly Higher: ↑

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)



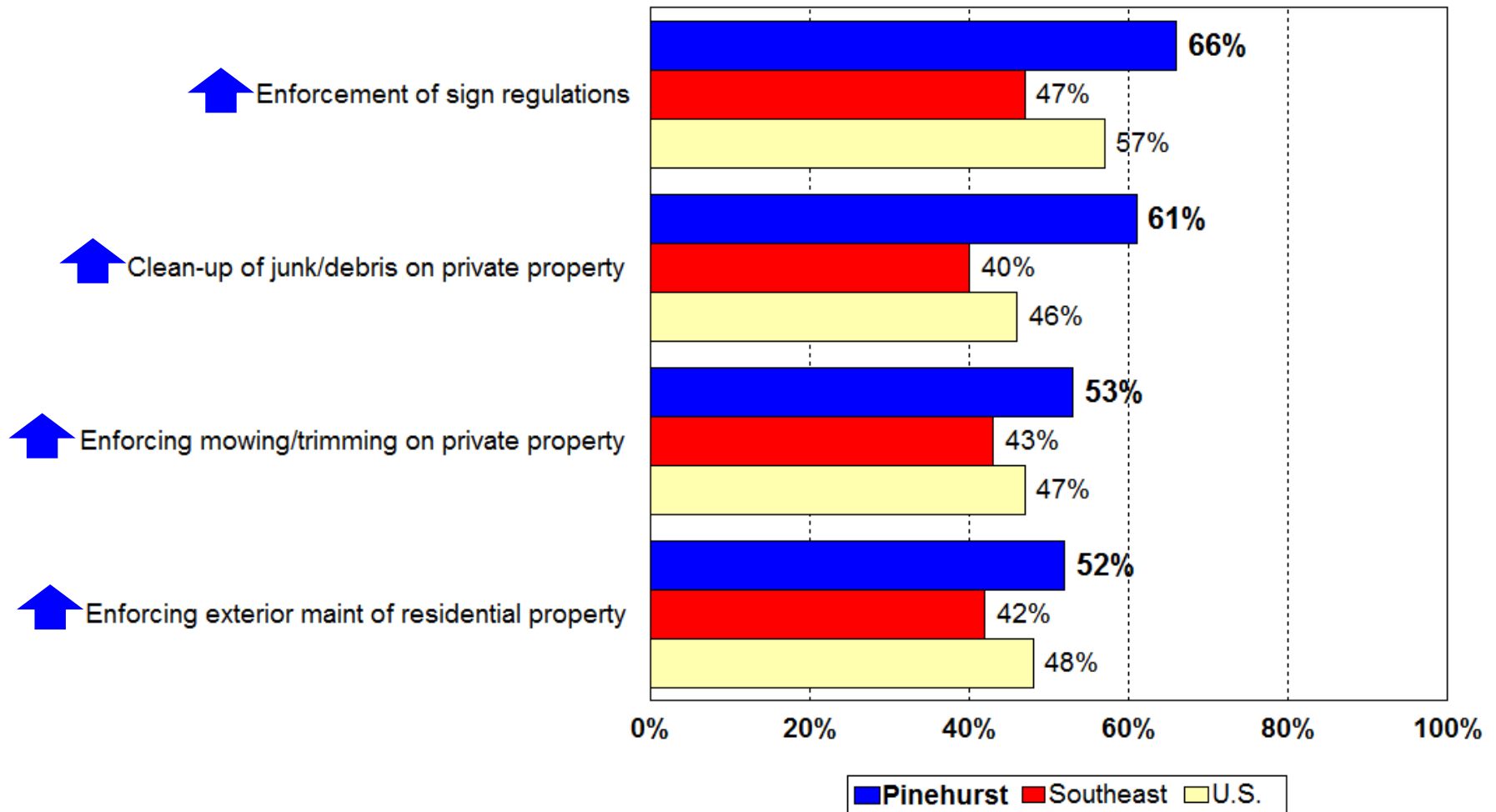
Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

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 no opinion)

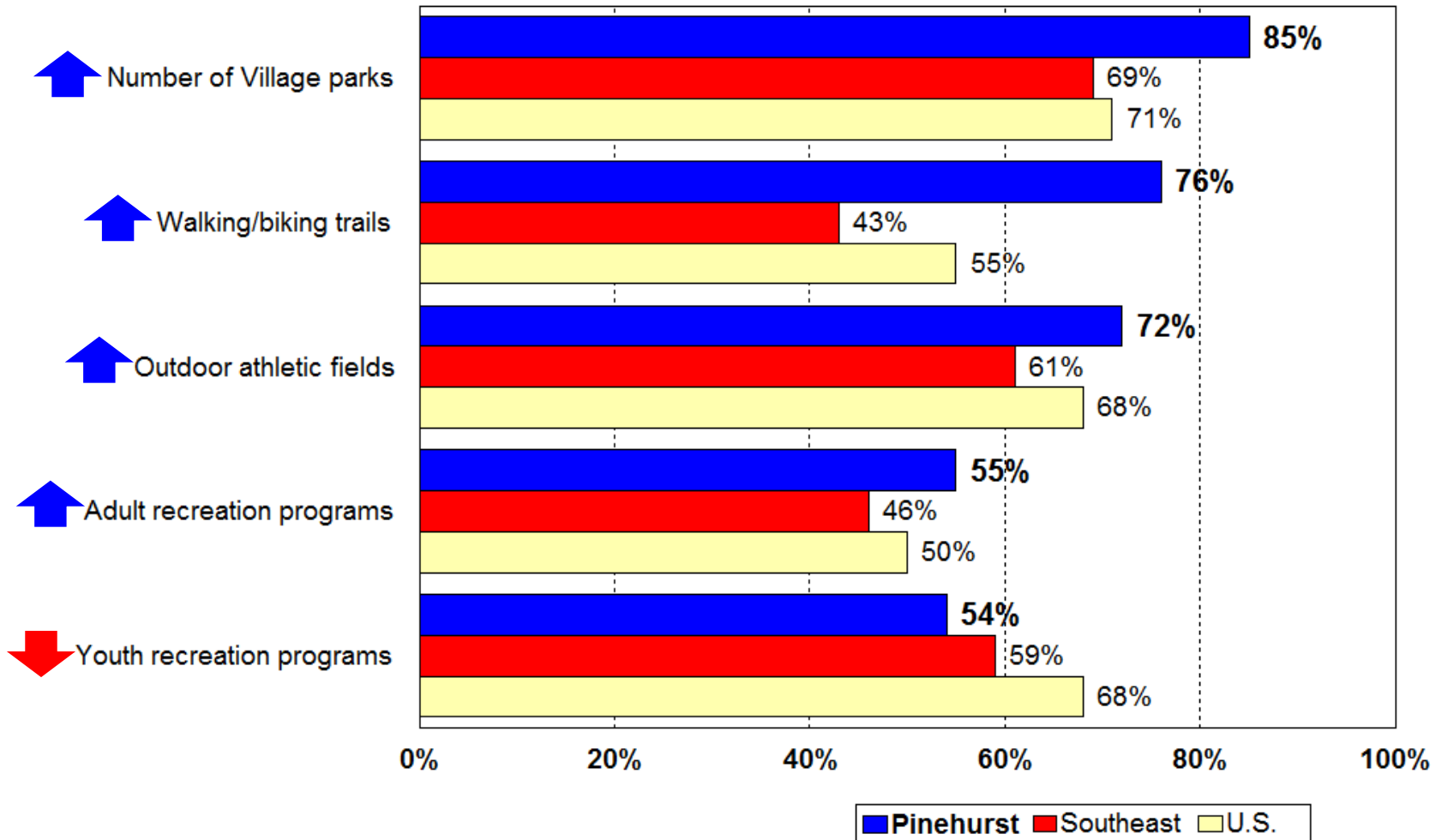


Significantly Higher: 

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 no opinion)



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

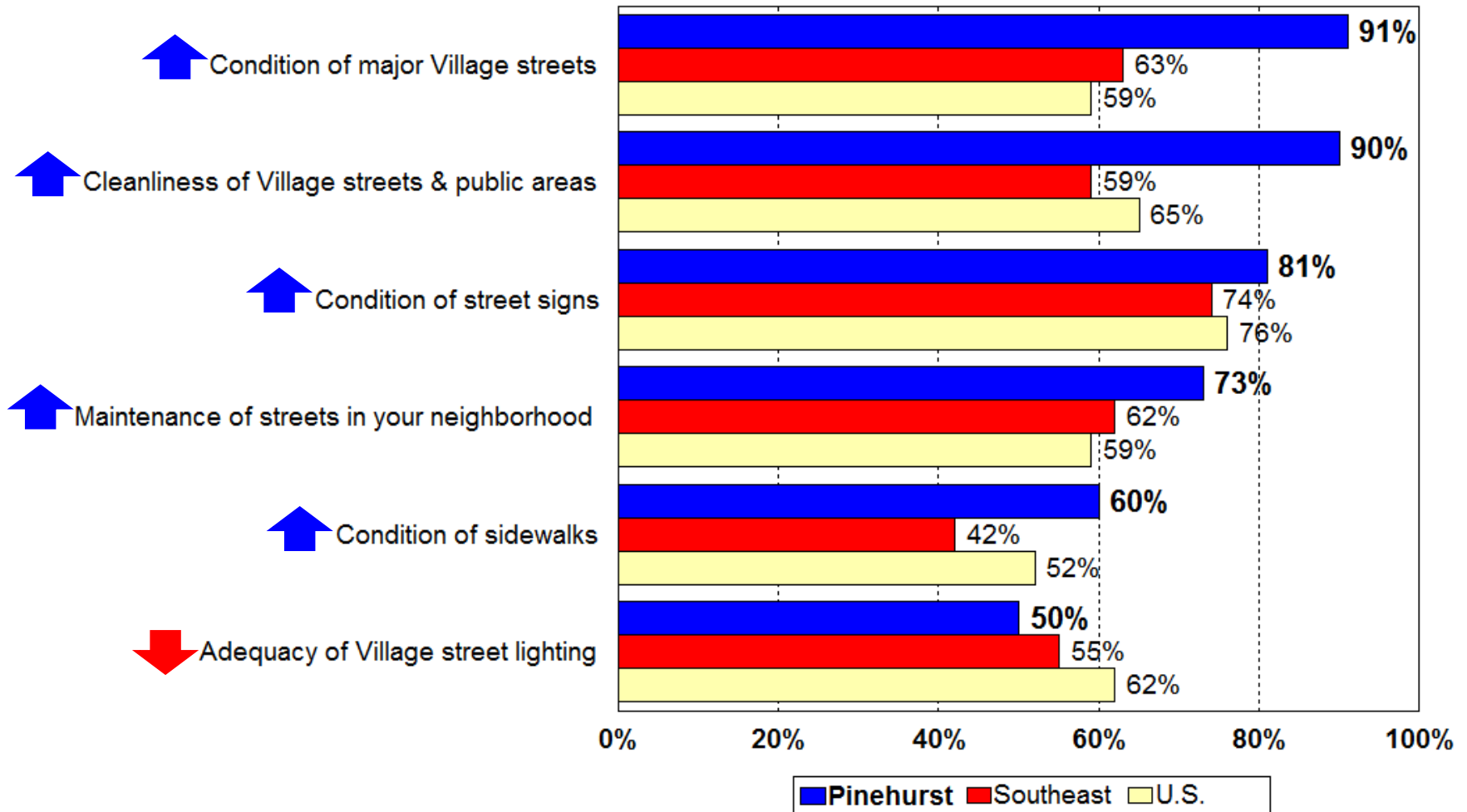
Significantly Higher: ↑

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 no opinion)



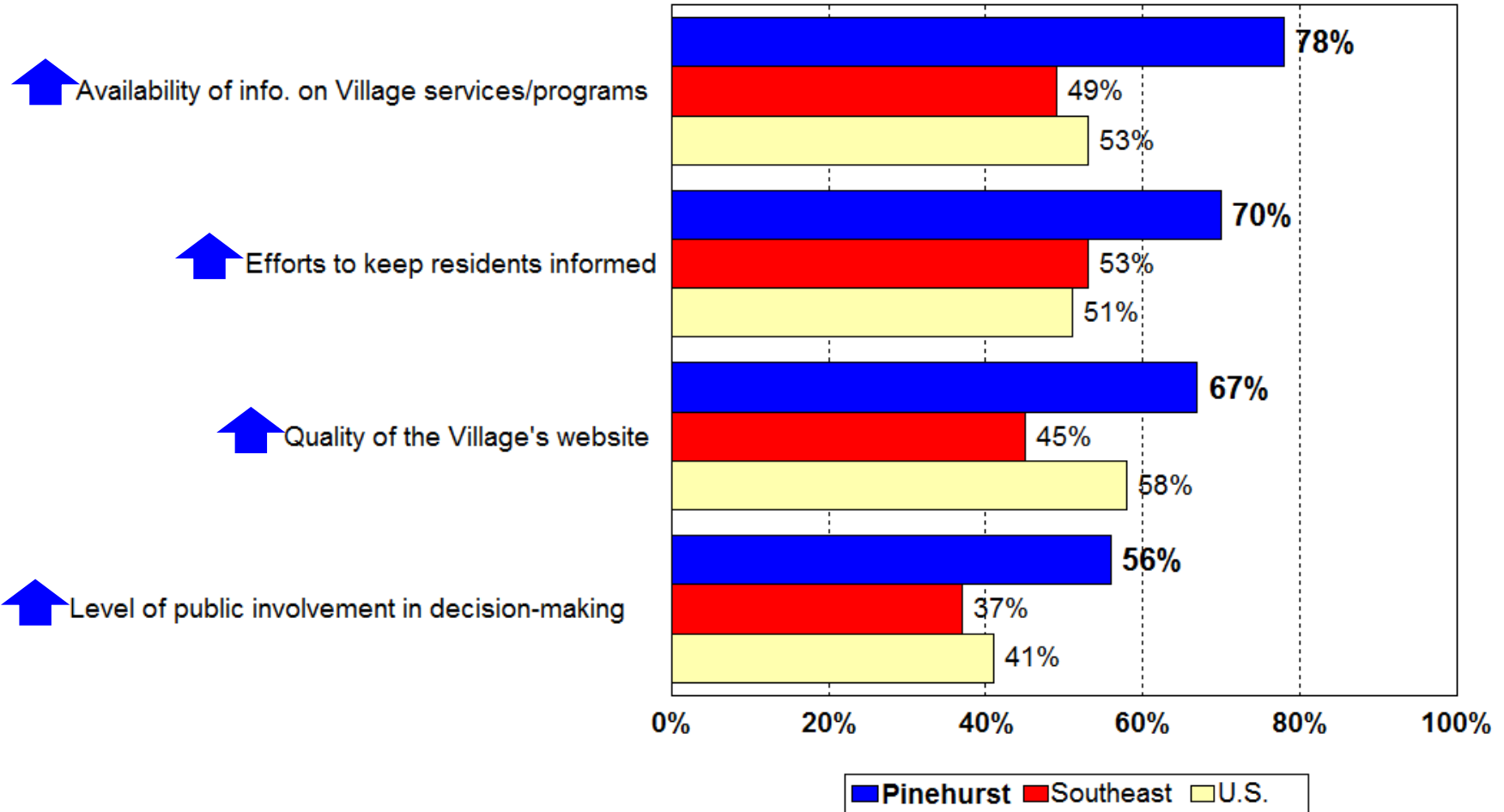
Source: ETC Institute Direction Finder (2016 - Pinehurst, NC)

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 no opinion)

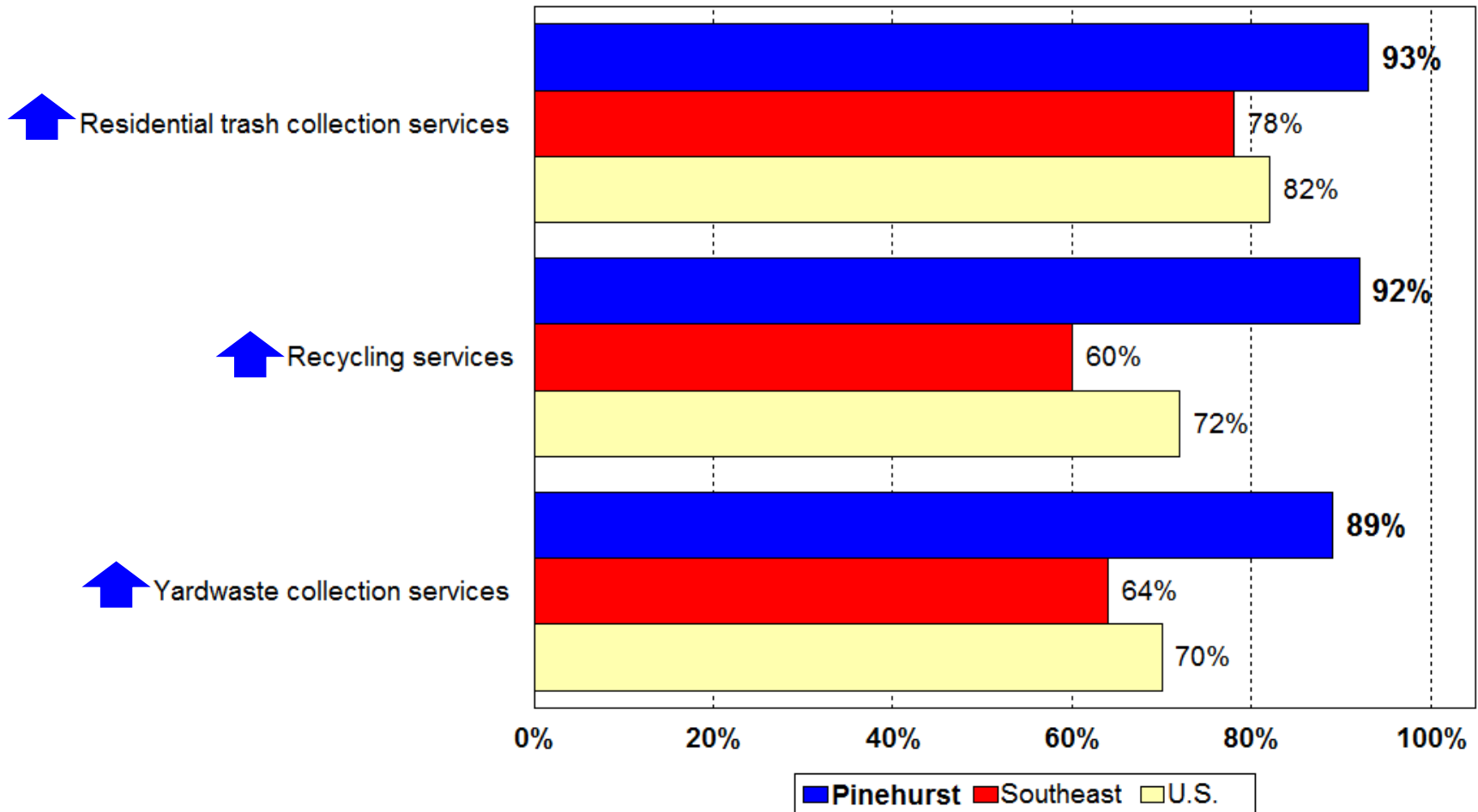


Significantly Higher: ↑

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 no opinion)



Source: ETC Institute Direction Finder (2016 - 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	41%	1	72%	8	0.1166	1
Level of public involvement in local decisions	25%	5	57%	12	0.1070	2
Enforcement of Village codes & ordinances	26%	4	61%	11	0.1009	3
<u>Medium Priority (IS <.10)</u>						
Street & right-of-way maintenance	31%	3	71%	9	0.0894	4
Parks & recreation facilities	22%	6	77%	7	0.0511	5
Village promotion of natural resource conservation	14%	10	68%	10	0.0450	6
Parks & recreation programs	15%	8	78%	6	0.0342	7
Village communication with residents	15%	9	81%	5	0.0291	8
Police services	34%	2	92%	2	0.0255	9
Solid waste services	13%	11	88%	3	0.0155	10
Fire services	20%	7	95%	1	0.0096	11
Customer service provided by Village employees	4%	12	82%	4	0.0075	12

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
Medium Priority (IS <.10)						
Frequency that police patrol your neighborhood	30%	3	73%	5	0.0836	1
Fire prevention & education programs	15%	6	67%	6	0.0488	2
Enforcement of local traffic laws	21%	5	79%	4	0.0447	3
How quickly police respond to emergencies	31%	2	87%	2	0.0391	4
Village efforts to prevent crimes	53%	1	93%	1	0.0379	5
How quickly fire personnel respond to emergencies	23%	4	85%	3	0.0336	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
High Priority (IS .10 -.20)						
Availability of recreation indoor facilities	23%	5	42%	13	0.1351	1
Medium Priority (IS <.10)						
Village sponsored cultural arts events	28%	1	66%	7	0.0944	2
Quality of adult recreation programs	20%	6	55%	10	0.0881	3
Quality of recreation indoor facilities	15%	10	47%	12	0.0790	4
Quality of youth recreation programs	15%	9	54%	11	0.0715	5
Range of amenities at parks & rec facilities	17%	7	59%	9	0.0709	6
Availability of info about recreation programs	16%	8	63%	8	0.0586	7
Condition of Walking/Greenway trails	24%	4	76%	4	0.0559	8
Availability of Walking/Greenway trails	25%	3	78%	3	0.0529	9
Quality of Village parks	25%	2	87%	1	0.0318	10
Availability of outdoor athletic fields/facilities	7%	12	66%	6	0.0249	11
Quality of outdoor athletic fields & facilities	7%	13	72%	5	0.0197	12
Number of Village parks	9%	11	86%	2	0.0125	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	43%	1	42%	11	0.2480	1
Adequacy of street lighting	41%	2	50%	10	0.2022	2
<u>High Priority (IS .10 -.20)</u>						
Quality of stormwater runoff/management system	23%	4	54%	9	0.1035	3
<u>Medium Priority (IS <.10)</u>						
Maintenance of streets in your neighborhood	31%	3	74%	6	0.0808	4
Winter weather response on Village streets	21%	5	71%	7	0.0618	5
Condition of sidewalks	11%	10	60%	8	0.0448	6
Maintenance of street signs/pavement markings	11%	11	81%	5	0.0212	7
Maintenance/preservation of Downtown	18%	8	89%	3	0.0190	8
Overall cleanliness of streets & other public areas	19%	6	90%	2	0.0189	9
Maintenance of main Village street thoroughfares	18%	7	91%	1	0.0166	10
Landscaping in medians & other public areas	15%	9	89%	4	0.0162	11

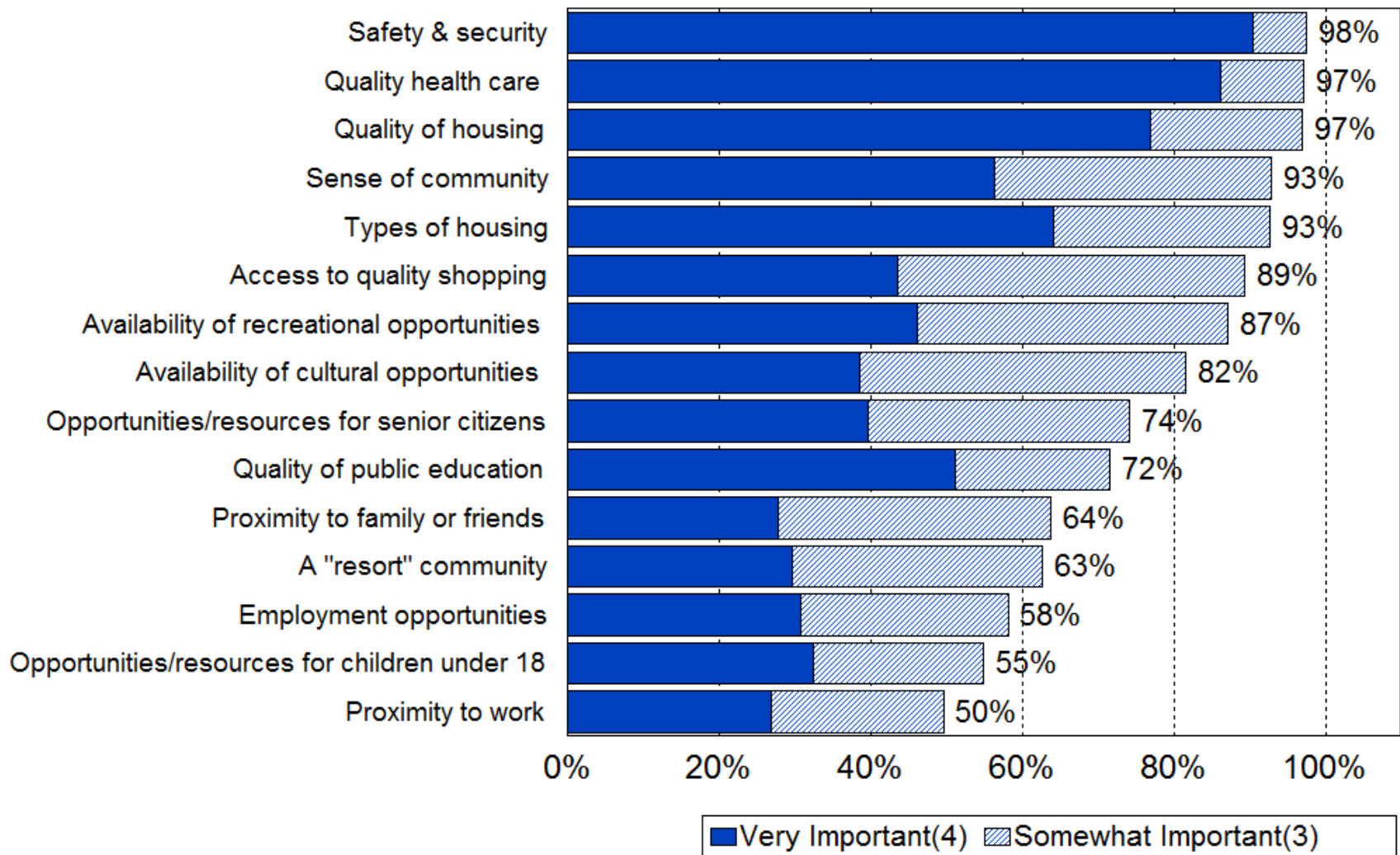
Public Services Priorities:



Other Findings

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

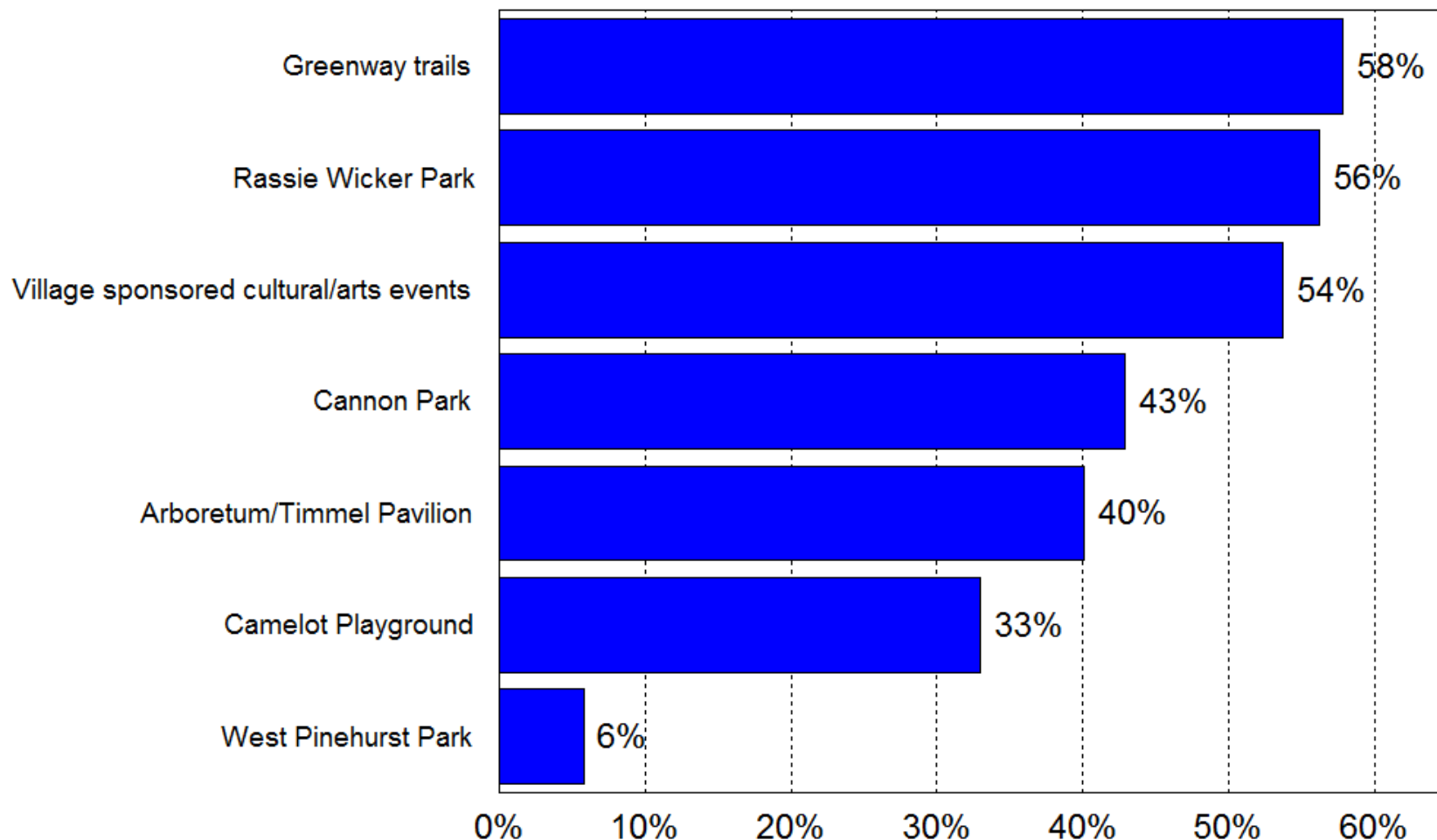
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

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

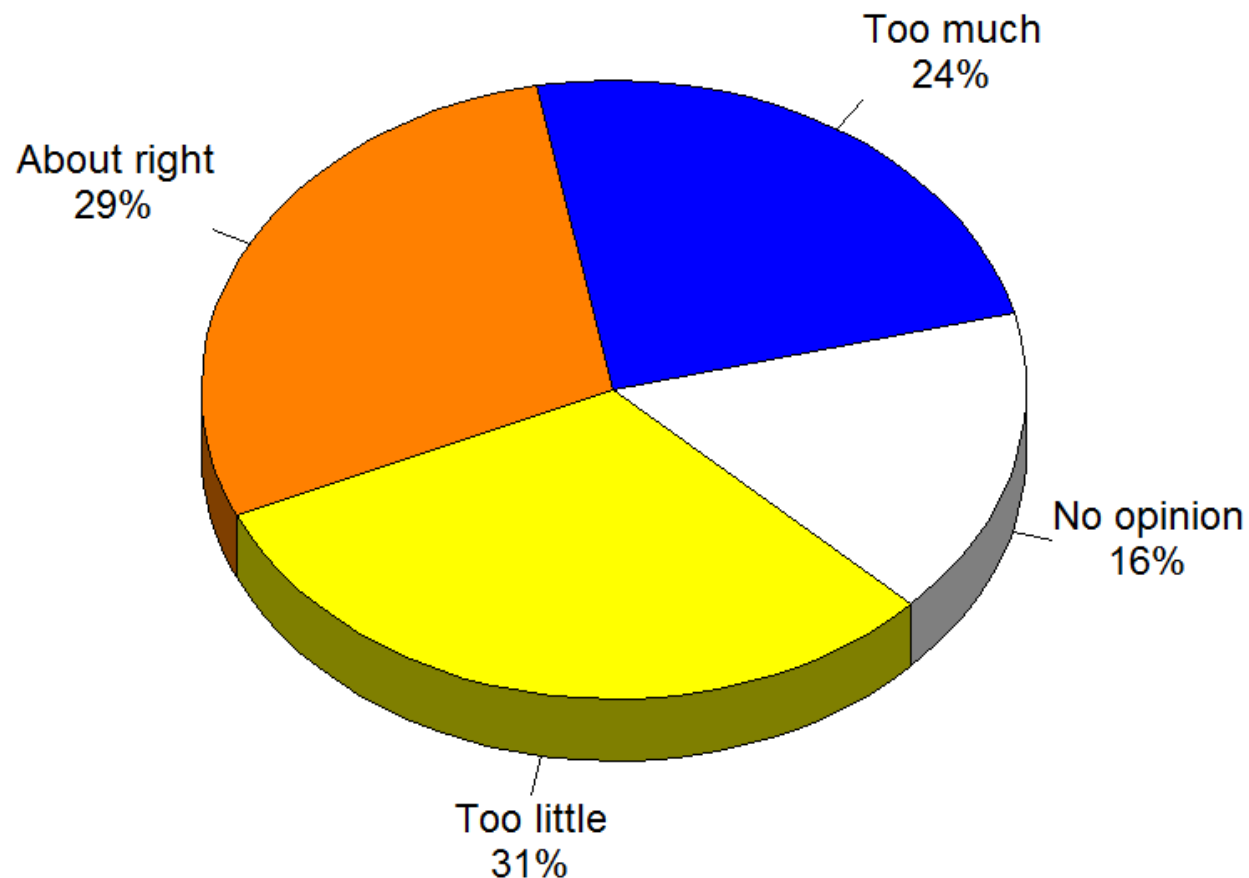
by percentage of respondents (multiple choices could be made)



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Q13. How would you describe the amount of effort the Village applies to enforce its codes and ordinances?

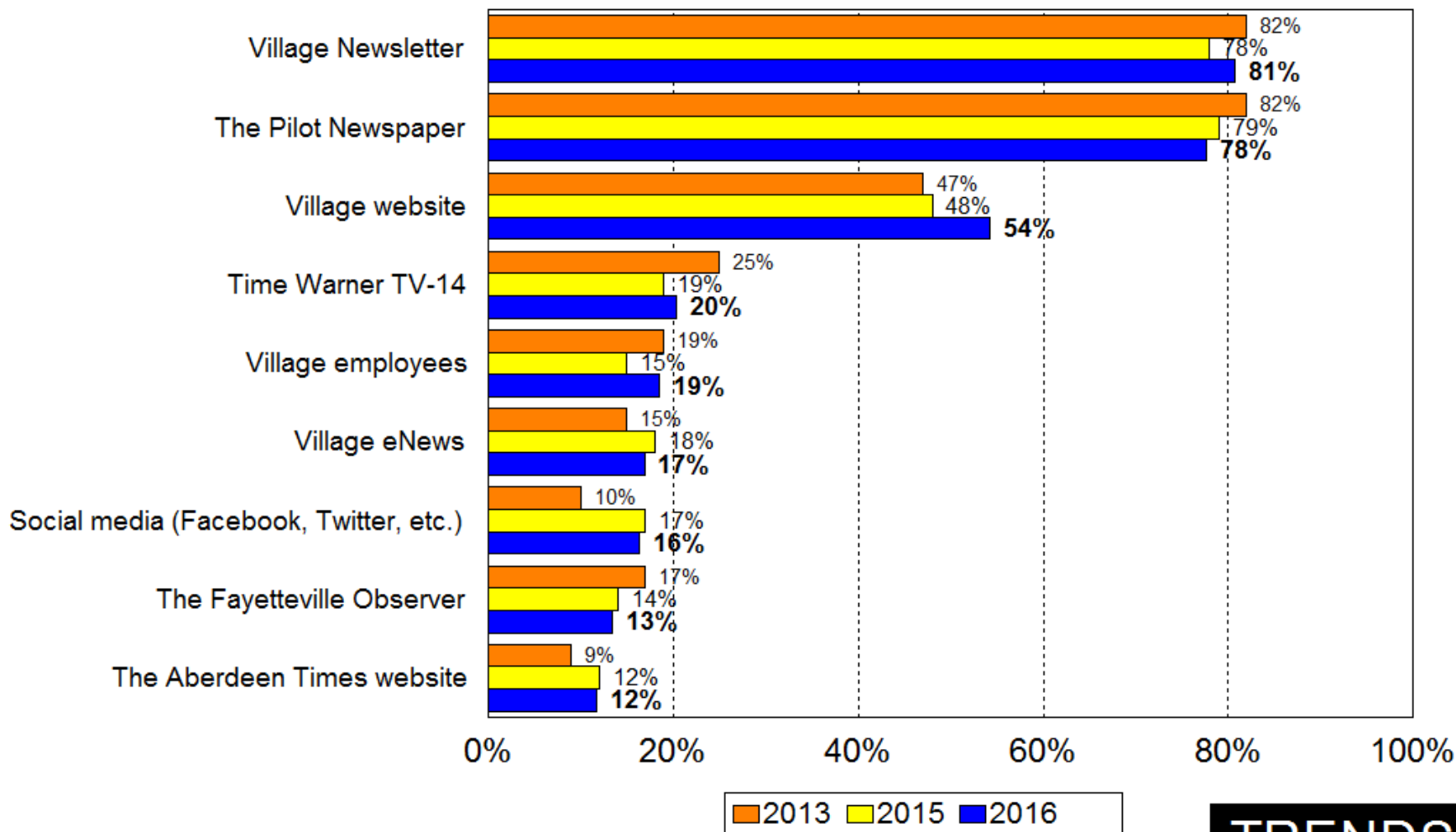
by percentage of respondents



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Q19. Which of the following do you use to get information about the Village of Pinehurst? - 2013, 2015 & 2016

by percentage of respondents (multiple selections could be made)

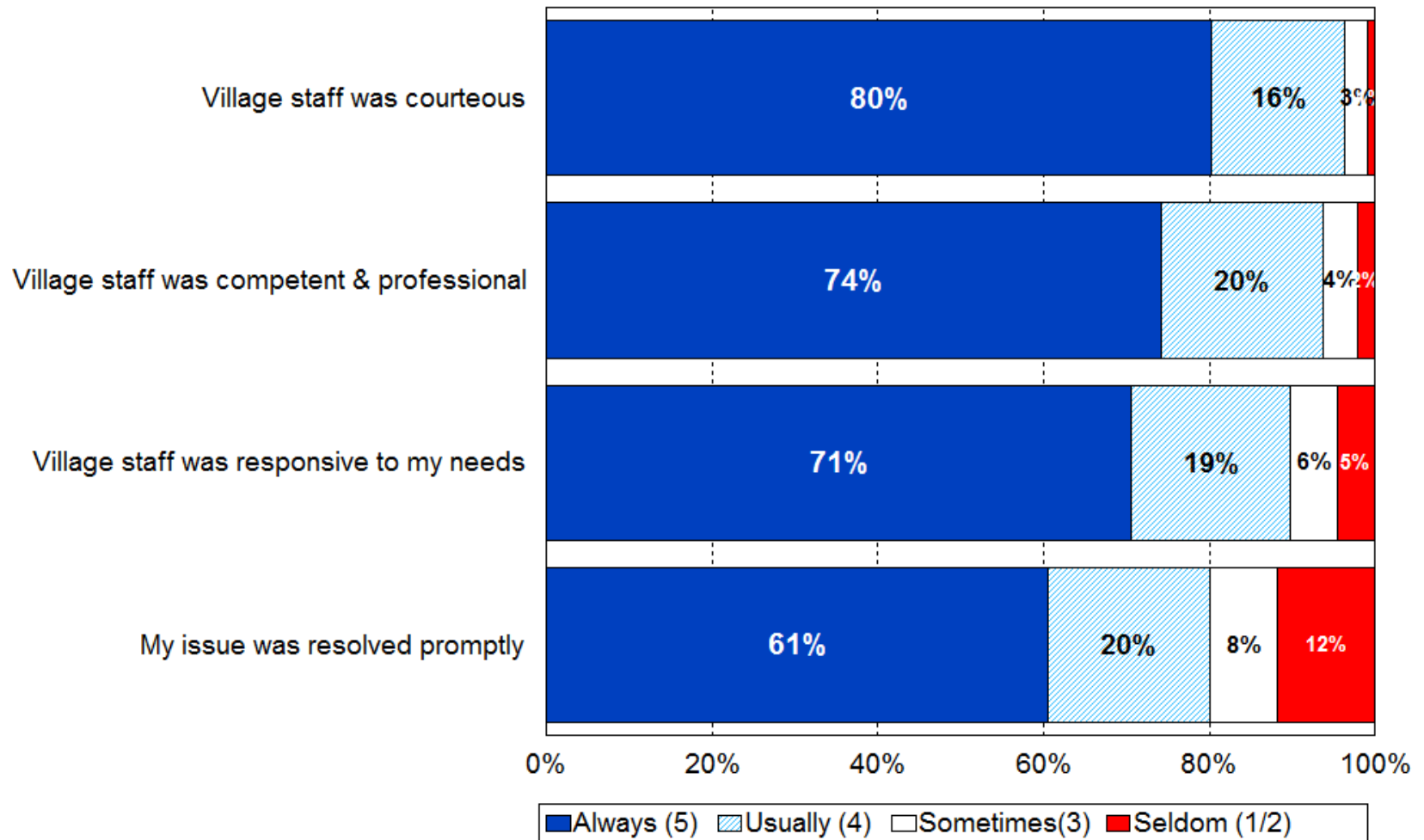


Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Q21a-d. Satisfaction with Experience Interacting with Village Employees

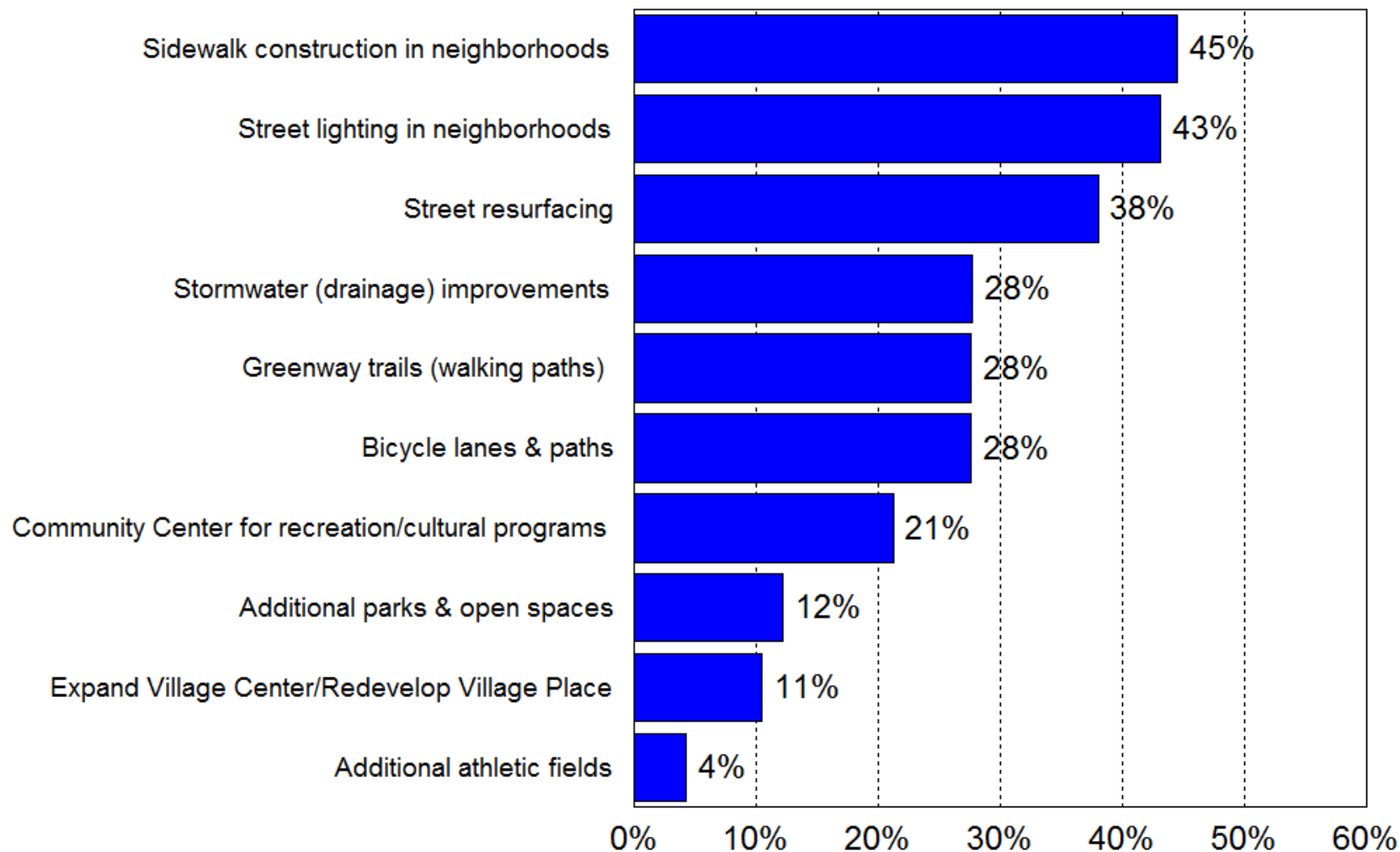
by percentage of respondents that have contacted the Village in the past year



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Q22. Capital Improvements That Residents Feel Are the Most Important

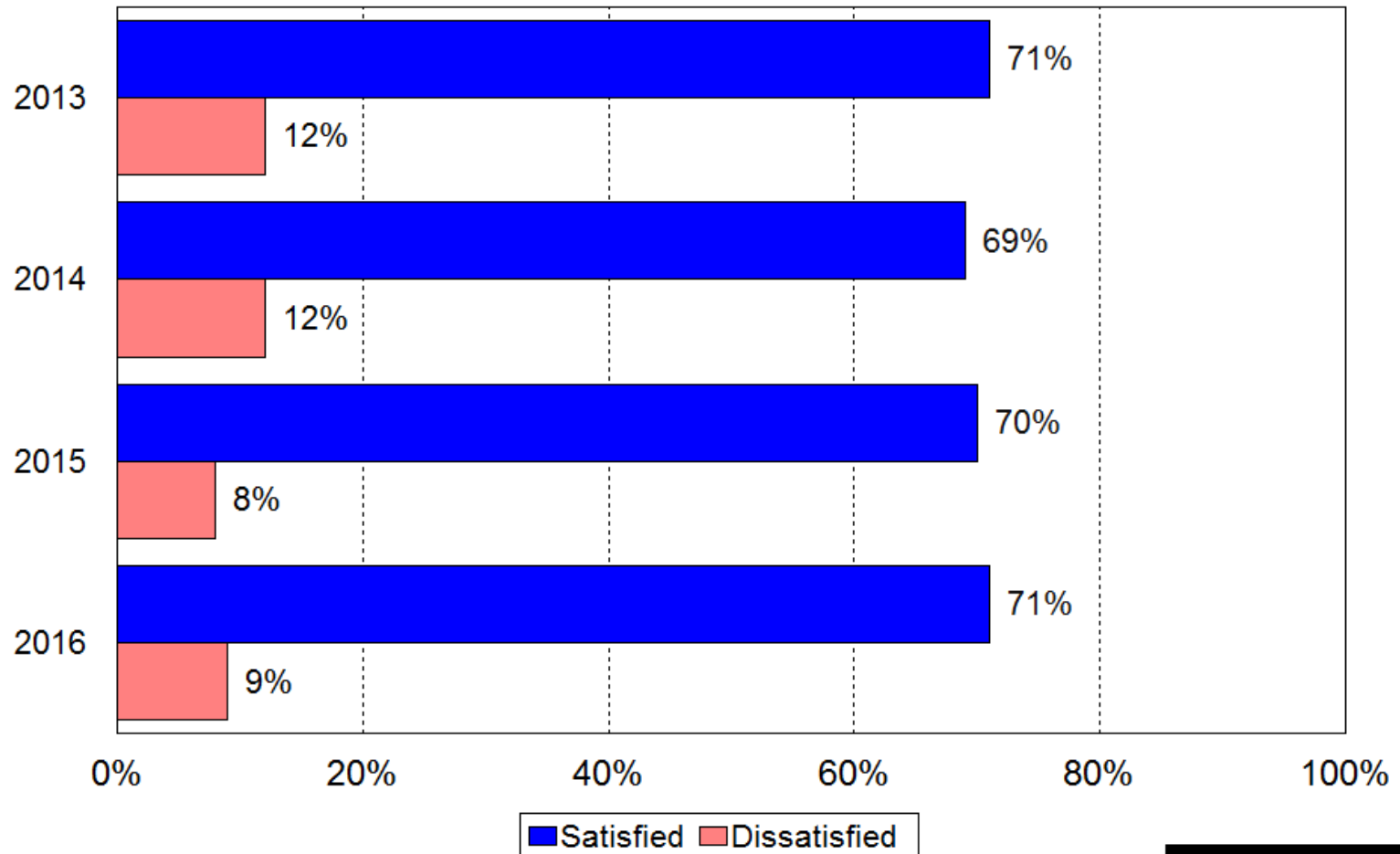
by percentage of respondents (3 selections could be made)



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

Q23. 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")



Source: ETC Institute DirectionFinder (2016 - Pinehurst, NC)

TRENDS

Summary

- **Residents Have a Very Positive Perception of the Village**
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
 - ❑ 94% would recommend Pinehurst to others as a place to live
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 63 of 86 areas since 2015; increased or stayed the same in 72 of 81 areas since 2013
- **Satisfaction with Village Services is Much Higher in Pinehurst Than Other Communities**
 - ❑ The Village rated above the Southeast Regional Average in 45 of 47 areas, and above the U.S. Average in 44 of the 47 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Level of public involvement in local decisions
 - ❑ Enforcement of Village codes and ordinances

Questions?

THANK YOU!!