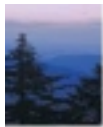


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT ANALYSIS

Alleghany County

July 2003

SWOT Outline

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- a. Overview
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Alleghany County SWOT Analysis

July 2003



AngelouEconomics is pleased to present the Alleghany County *SWOT Analysis* as part of the Northwest North Carolina Comprehensive Economic Development Strategy (CEDS). This report is one of several that will examine the 8-County study area during a 10-month process to identify the area's assets and prepare the area for future growth. All analysis and strategies will be done on a County-by-County basis in order to consider the unique challenges and opportunities present in each individual County. Following the completion of the County plans, an area-wide plan will be formed from each County's goals to support the existing regional economic development efforts already underway.

All reports will be available online at www.northwestnc.com as they are completed. We encourage you to review them thoroughly and provide us with your comments and insight. Thank you for your input.

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Purpose of the SWOT Analysis

The purpose of this *SWOT Analysis* is to provide a critical review of key factors that impact business expansion and relocation. It reflects input the consulting team gathered from focus groups and interviews, the on-line survey of residents and businesses (www.northwestnc.com), and meetings with the CEDS Advisory Committee.

The *Alleghany County Economic and Demographic Assessment*, Report One, contains an overview of the trends impacting the County's current business conditions, including population demographics, worker education, income and wages, industrial composition, trade, and tax revenue.

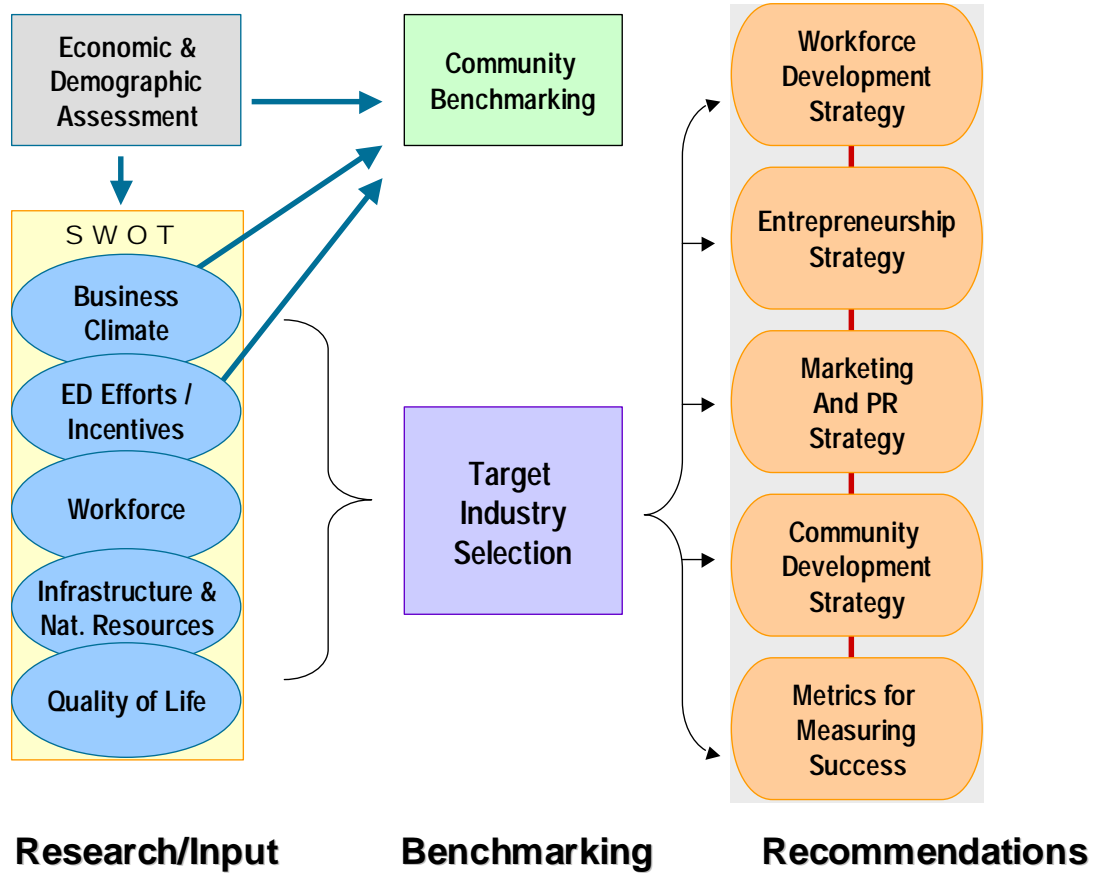
The *SWOT Analysis*, Report Two, takes the investigation of Alleghany County's economic conditions one step further. First, it incorporates the *perceptions* of the County that the consulting team gathered during its interviews, focus groups, County tours, and on-line survey. It also considers how closely those perceptions align with the economic and demographic information presented in Report One. Finally, it allows the consulting team to rank Alleghany County on its performance in key variables affecting economic development.

The community's perceptions of Alleghany County as a place to live and work are important. Public input gathered from businesses identifies specific problems that must be addressed in order to retain local companies. It also highlights the attributes that should be enhanced even further and marketed to outside companies. Similarly, the perceptions of residents provide local leaders with aspects of the County that need to be improved to retain skilled workers, as well as qualities that could be promoted to draw in educated residents.

Combined, the Economic and Demographic Assessment and the SWOT Analysis will form the foundation for the target industry selection and recommendations offered in the final *Strategic Plan*.

The diagram below illustrates the purpose of the SWOT Analysis in relation to our project process.

Project Process Diagram



SWOT Analysis Overview

The first phase of developing an action plan is to build a baseline for Alleghany County to learn what weaknesses need to be addressed and the strengths that must be promoted to make the County, and surrounding region, conducive to economic prosperity. The SWOT assessment is structured around five factors critical to the County's future success:

- 1. Factor 1: Business Climate:** Capacity of public sector to support business expansion and development opportunities. Topics explored include: tax rates, regulatory climate, business expansion/development support, communication and collaboration and specific activities, and climate for entrepreneurship.
- 2. Factor 2: Workforce & Education:** Programs and delivery of services by organizations and institutions involved in workforce development and education including K-12 education, community colleges, universities, and workforce development boards/organizations. Topics explored include: educational attainment; communication and collaboration between workforce/education organizations, economic development organizations, and the private sector; resource allocation; and effectiveness of delivery of services.
- 3. Factor 3: Infrastructure:** County and regional infrastructure, as well as site-specific infrastructure to support business expansion and development. Topics explored include: transportation (roads, rail, air), utilities (water, wastewater, electricity and gas), telecommunications, land and real estate, and business parks.
- 4. Factor 4: Quality of Life:** Issues that influence an existing or potential resident to reside or a company to expand or relocate in a particular area. Topics explored include: cultural and entertainment options, recreational amenities, crime rate, diversity of housing, and the environment (eg., air quality, temperature).
- 5. Factor 5: Economic Development Efforts:** The activities of local, regional and state organizations involved in any form of economic development activity. Topics explored include: external promotion and marketing, internal promotion, and resource allocation.

In addition to assessing the strengths, weaknesses, opportunities, and threats facing Alleghany County within each of the five critical factors, AE has developed a rating of the County's performance. The ratings are based on a simple scale:

Low – Alleghany County's current state does not meet the needs of existing and future businesses and their workers.

Moderate – Alleghany County's current state is adequate for existing businesses but improvements are needed to attract new investment.

High – Alleghany County has the assets to support the needs of current and future businesses.

Key Findings

The SWOT Analysis represents perceptions of Alleghany County that the consulting team gained from the County's residents and businesses. As a part of the public input process, the team facilitated focus groups, met one-on-one with County leaders, and conducted an on-line survey. This report contains a compilation of comments and ideas collected through that process.

While more than 60 people participated in focus groups, the on-line survey provided an opportunity for all residents of Alleghany County to provide their thoughts on economic development issues. In total, 77 residents and 14 companies responded to the survey. A detailed summary of survey findings is provided as an appendix to this report, highlights are provided in the two tables below.

Alleghany County Companies' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Business Location	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Arts / Culture</i>
2 <i>K-12 Education</i>	<i>Family environment</i>	<i>Entertainment / Recreation</i>
3 <i>Family Environment</i>	<i>Effective Government Leadership</i>	<i>General Economy</i>
4 <i>Effective Government Leadership</i>	<i>Cost of Labor</i>	<i>Strong Economic Growth</i>
5 <i>Business Climate</i>	<i>Cost of Living</i>	<i>University</i>

Alleghany County Residents' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Low Crime</i>	<i>High Paying Jobs</i>
2 <i>Good Healthcare</i>	<i>Climate</i>	<i>Career Advancement Opportunities</i>
3 <i>Low Crime</i>	<i>Family Environment</i>	<i>Job Availability</i>
4 <i>Effective Government Leadership</i>	<i>K-12 Education</i>	<i>Strong Business Growth</i>
5 <i>Cost of Living</i>	<i>Community College</i>	<i>Arts / Culture</i>

The survey results pinpoint specific areas of strengths and challenges within Alleghany County. On a broader level, the consulting team has identified three issues that impact the prosperity of Alleghany County in future years:

- Workforce Development
- Transportation and Wastewater Infrastructure
- Natural Resources

These issues have overarching impact on not only future economic development activities, but also on Alleghany County's future business climate, infrastructure demands, workforce development, and quality of life.

- **Blue Ridge Business Development Center.** The workforce and education programs in Alleghany County are excellent and will be superior to most workforce programs in other rural North Carolina counties. Not only will this Center have community college classes and technical training, but it will

also house a business incubator to foster the burgeoning entrepreneurial activity in Alleghany County.

- **Transportation Infrastructure.** There are no 4-lane highways in Alleghany County. There are several 2-lane roads and highways, including the Blue Ridge Parkway but the transportation network is a limiting factor for business development and tourism growth.
- **Natural Resources.** Alleghany County's best asset is natural resources – the New River and the Parkway. However, there currently is no direct access to a park in Alleghany County and the natural beauty of the mountains is being exploited by Christmas tree production, which is not a very sustainable product.

Factor 1: Business Climate and Entrepreneurship Development

AE defines business climate as the capacity of the public sector to support business expansion and development opportunities. Typical factors that help shape a community's business climate are the following:

Tax Rates – Composed of property taxes levied by County, city and school district

Regulatory Climate – The length, complexity, and consistency of the permitting process and the responsiveness of city officials and staff towards business development

Industry growth – The growth rates of major area industries that is an indicator of the health of the local economy

Location – The access to major highways, airports, and to metropolitan areas

Communication and Collaboration – Communication and cooperation between public and private sector on initiatives

Entrepreneurial environment – The availability and/or access to business incubators, research and development facilities, financing and business advisory networks.

Incentive policy – Includes tax abatements, permitting fee waivers, and utility hook-up waivers

Alleghany County's Ratings:

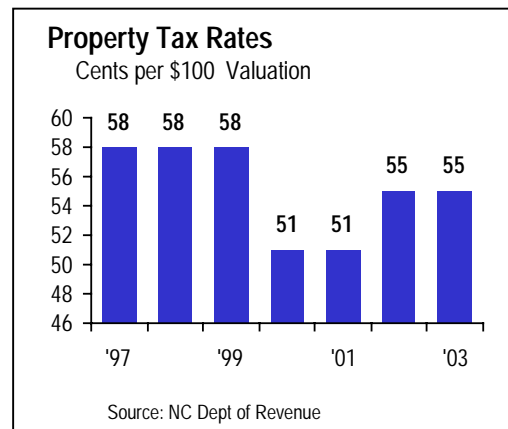
Tax Rates

Alleghany County enjoys an extremely low property tax burden and has been able to maintain its County rate relatively constant over the years (\$0.55). Sparta also has an extremely low city property tax rate, and the combined city/County rate is the lowest in the region.

While local property taxes are relatively low in North Carolina, the state's personal and corporate income tax rates are generally higher than neighboring Virginia and South Carolina. Virginia's sales tax rate is lower, and evidence of this can be seen by the loss of some retail spending in northern counties to establishments across the stateline. Low property tax rates and high corporate income tax rates are generally conducive to an economy based in capital-intensive manufacturing. Without considering the effect of incentives, Alleghany County's tax burden should be considered attractive to these types of industries.

Business Climate & Entrepreneurship	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>Tax rates</i>	Moderate
<i>Regulatory climate</i>	Moderate
<i>Industry growth</i>	Low
<i>Location</i>	Low
<i>Communication and Collaboration</i>	High
<i>Entrepreneurial environment</i>	High
<i>Incentive policy</i>	Moderate

The **Regulatory Climate** in Alleghany County is fairly good. There is no zoning ordinance in place, yet a Land Use Plan has been adopted. This not only provides needed predictability to business and residents as to what surrounding lands can be used for, but it will also help to protect those natural assets that Alleghany County has. Alleghany County is a business friendly environment, with leadership rallying around potential business opportunities for the County. City and County leaders work well together to help existing business expand and potential business to relocate.



Industry Growth has been static, if not in a decline in recent years. The closure of Bristol Compressors and Lowe's has had a major impact on employment and retail sales in Alleghany County. However, the recent Martin Marietta opening has infused economic optimism among Alleghany residents. This company will be developing state of the art fiber reinforced polymers.

The **Location** of Alleghany County is ideal for taking in natural beauty but an impediment for significant business development. Alleghany County is located in the heart of the Blue Ridge Mountains with entrances to the Parkway within the County. However, it is distant from any major metropolitan area (approximately 1 hour and 30 minutes driving time from Winston-Salem) and is difficult to access with the current transportation infrastructure. However, there is a large truck distribution company located in Sparta that does not see the location as a detriment to doing business. Sparta is approximately 30 minutes south of a major interstate in Virginia that the distribution company uses often.

The Business Development Center is testament to how effectively the public and private sectors **Communicate and Collaborate** around business initiatives in the County. The County understands the importance of maintaining effective relationships with existing business and by helping existing business expand through technologic transfer, workforce training and education.

The facilities that are being developed and the **Entrepreneurial Environment** in Alleghany County are highly sophisticated and right on track with where they need to be to support entrepreneur development in the County. Again, the Business Development Center will not only offer state of the art training and educational facilities, but also offer a business incubator. This type of program should be a model for other counties as they consider developing similar resources to support small business development.

In addition to the Business Development Center, a rural entrepreneurship program (REAL) has recently become a resource in Alleghany for individuals interested in starting their own business. This grass roots approach to entrepreneurship development assists individuals with all the technical assistance necessary to start a small business in a rural area. Alleghany County is also in the service area of the Region D Development Corporation, which is staffed by the High Country Council of Governments in Boone. The organization provides fixed rate long-term financing to eligible small businesses through the SBA 504 Loan Program.

The **Incentive Policy** for Alleghany County has recently come under fire, as Alleghany County sues Bristol Compressors for a refund of incentives given. North Carolina counties are limited in the amount and types of incentives available to companies. Alleghany County does have Tier 1 status, which provides significant incentive capabilities over other non Tier 1 counties in North Carolina.

Companies located in North Carolina face a high income tax burden relative to Virginia, Tennessee, and South Carolina. The State offers numerous incentives to reduce a company's state income tax burden, such as job creation tax credits and investment tax credits. While helpful, these tax credits are now commonplace among many states in the U.S., including neighboring states, and today provide minimal differentiation in the site selection process.

Most competitive incentives in the southeastern U.S. are cash- or grant-based, of which little is available in North Carolina at the state or local level. Although the State of North Carolina does not allow counties to give economic incentives in the form of property tax abatements, certain measures can be taken by the County to enhance its attractiveness to relocating companies. Counties may acquire or construct 'shell buildings', which are structures of flexible design adaptable for use by a variety of industrial or commercial businesses, and offer to lease them to companies on favorable market terms. This practice is common in North Carolina, and is frequently shown as the primary example of an economic development effort at the local level.

We will examine in greater detail the issue of incentives in the "Benchmarking" report to be completed in conjunction with the Target Industry Selection report.

Factor 2: Workforce & Education

AE defines this component as the skill sets of the available labor pool and the programs of organizations involved in workforce development. The organizations include K-12 education, community colleges, universities, and workforce development boards/organizations. Factors that shape Alleghany's workforce and education capacity are the following:

K-12 Education – This factor considers academic performance, community support, computer access and training programs, workforce training programs, and condition of buildings.

Higher education - Resident and private sector access to area universities and community colleges facilities and training programs. Greater community access to higher education facilities provides more opportunities for workforce skill improvement, customized training programs for local companies, and access to research and development resources.

Workforce Development – This factor considers resident and business access to quality workforce training facilities at community colleges, high schools, private enterprises, and government facilities.

Labor pool - The area and number of workers that the community can draw from to support employer workforce demands. This factor also considers the skill sets of the labor pool.

Educational attainment levels – This factor analyzes the percentage of residents that have received high school, Bachelors, or advanced degrees. The higher percentage of residents with Bachelors degrees, the greater the potential to support high-skill, high wage jobs.

Alleghany County's Ratings:

The **K-12 Education** is exceptional for a County as small in population as Alleghany. The County maintains three elementary schools and one high school. The class size is low, a large percentage go on to further education, and through distance learning some seniors have come out with a semester or even a year towards college education. The high school will also be able to take advantage of the new Blue Ridge Business Development Center that will be located adjacent to the high school facility.

Workforce & Education	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>K-12 Education</i>	High
<i>Higher education</i>	Moderate
<i>Workforce Development</i>	High
<i>Labor pool</i>	Moderate
<i>Educational attainment levels</i>	High

Higher education

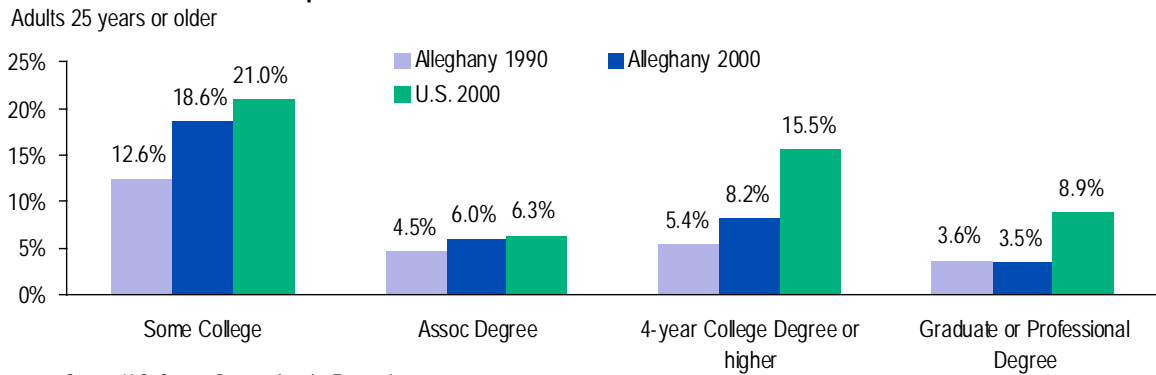
Wilkes Community College has a satellite campus in Sparta but will be moving shortly to the new Blue Ridge Business Development Center also in Sparta. Six percent of Alleghany County adults have Associates degrees, on par with the U.S. average. This speaks perhaps to the Community College's abilities and will certainly be improved upon with their new space.

The **Workforce Development** in Alleghany County is excellent. The Blue Ridge Business Development Center in Sparta is not only state of the art, but also offers tremendous opportunities to Alleghany County. It was established in 2001 and will house Wilkes Community College, Blue Ridge Business Development Center, Alleghany Job Link (Workforce Development Center), a Customer service call center (11,000 sf), Offices for small businesses to rent, 11 full and part time staff already, and a Cyber Campus –bringing advanced degrees and education into the County via distance learning (“Phase I”).

Labor pool. The labor force within Alleghany County is only 5,100, but more than 93,500 within a five County area including Alleghany, Alleghany, Grayson (VA), Surry and Wilkes counties. More than 23% of Alleghany County laborers commute outside the County for employment.

The **Educational attainment levels** in Alleghany County have increased dramatically in the past decade with eight percent of adults now having 4-year degrees, up from 5 percent in 1990. It is likely that many of those residents are retired. The amount of residents with some college rose by 6 percentage points in the 1990s.

Educational Attainment Comparison, 1990 vs. 2000



Factor 3: Infrastructure and Land Use

AE defines this component as City, County, and regional transportation, utilities, telecommunications, and site-specific infrastructure to support business expansion and development. Factors that help shape Alleghany's infrastructure are the following:

Land – The costs and availability of commercial and industrial land

Transportation infrastructure – City and County transportation infrastructure that includes roads, airports, and rail infrastructure.

Telecommunications – Bandwidth capacity or transmission speeds and access to businesses and residents

Utilities – A measure of the rates, capacity, and access to water, wastewater, electric, and gas services for commercial and industrial customers

Available buildings/sites – The availability of buildings or “shovel ready” sites for commercial, office, or industrial use. “Shovel ready” means sites with utilities already available.

Alleghany County's Ratings:

Infrastructure & Land Use	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>Land</i>	Moderate
<i>Transportation infrastructure</i>	Low
<i>Telecommunications</i>	Moderate
<i>Utilities</i>	Moderate
<i>Available buildings / sites</i>	Low

The cost and availability of **Land** is changing rapidly in Alleghany County. There is no organized real estate board, and no Multiple Listing Service records are kept on the average price of a home. But local real estate agents say most homes typically sell for a fourth of the price of their urban counterparts. Another rule of thumb, from Highland County's Building Permits Office, is

that the cost of building a new home here is \$50 per square foot compared to \$89 in Northern Virginia. The biggest land issue facing the County is that much of the rural, mountainous property is owned by people who do not live in the County. This trend is continuing and is driving up the appraised value of other properties. This could have a severe impact on other landowners – making land and housing unaffordable.

The **Transportation infrastructure** in Alleghany is sufficient enough to support tourism and some business development but will be a deterrent to significant business development. There are no 4-lane highways in Alleghany, but the County is located 28 miles to I-77 in Elkin, NC, and 12 miles to US 58 in Independence, VA. US Hwy 21 and 221 as well as NC primary roads 18,93 and 113 are the only roads that provide access through the County – all of which are 2-lane roads. The Blue Ridge Parkway has limited access points in Alleghany but also runs through the County. There are no rail lines in Alleghany County and the nearest airports are in Greensboro (90 minute drive) or Charlotte (120 minute drive). Alleghany does have a rural transportation system, Alleghany in Motion, and several taxicab services.

Telecommunications infrastructure in Alleghany is very good for a rural or urban County. The County has made significant strides in improving the telecommunications infrastructure during the past decade. A KPMG report on North Carolina counties' telecommunications reported that as of March 2002, Alleghany County did not have cable modem capability. There does, however, seem to be DSL and ISDN capacity in a few areas of the County. Certainly, the topography of Alleghany is an obstacle to making improvements in cell phone reception, but the County has truly done a good job to get to where they currently are.

Most **Utilities** are sufficient for existing business expansion and tourism growth, but are limiting factors for major industrial development. The topography in Alleghany make is difficult and expensive for major utility infrastructure development. The entire County, therefore, is served by groundwater. Although Sparta does maintain 16 wells at approximately 80% capacity, with a maximum daily capacity of .337 million gallons/day, and with an elevated storage capacity of 800,000+ gallons. Alleghany County has a sewer system and a treatment plant, but many new residential and commercial construction utilizes septic systems for wastewater treatment. The current treatment plant has a capacity to treat 600,000 gallons/day.

Blue Ridge Energies provides propane, fuel oil and kerosene to the entire County. Skyline Telephone provides telephone services and limited Internet connectivity, and Blue Ridge Electric provides electric utility service to the County. The Rural Internet Access Authority has provided Alleghany opportunities through grants to have total redundancy soon.

After having an abundance of available buildings, including the former Bristol Compressors building, the County is now faced with very few **Available buildings/sites** (largely due to the quick success the County had with Martin Marietta acquiring the Bristol building). The County does have one former sewing plant that is 65,000 square feet with 14' ceilings available. Additionally, the County may be considering other potential tracts suitable for an industrial site.

Factor 4: Quality of Life

AE defines this component as issues that influence an existing or potential resident to reside or a company to expand or relocate in a particular area. Factors that help shape Alleghany's quality of life are the following:

Crime rate – A low crime rate percentage is a positive indicator on a community's quality of life.

Commute times – This relates not only commuting to work, but also considers commute times for running errands, accessing entertainment or other non-work related places.

Retail choice – The measure of a community's access to a range of retail options including restaurants, grocery stores, cleaners, auto shops, and clothing stores.

Health care – The community's access to clinics, hospitals, and other medical facilities.

Community image – The external image of a community. Defined by building and streetscape architecture and placement of commercial and industrial properties in relation to residential areas.

Diversity of housing stock – A key factor in helping a community attract and retain companies and their higher skilled workers

Parks and recreation – A key factor for families with children who may be considering moving as part of business relocation or for a rural environment in which to raise their children. This factor also considers cultural and recreational amenities.

Alleghany County's Ratings:

Safety is a huge asset for Alleghany County. The Crime rate in Alleghany County is 10 crimes per 1000 people (Crimes include major offense). This is one of the lowest crime rates in North Carolina, and perhaps one of the key benefits of living in a rural County.

Twenty-three percent of Alleghany residents commute outside the County for employment. **Commute times** for these residents varies from less than 15 minutes to work in Surry, Ashe, and Wilkes counties, to more than 30 minutes to employment in Yakdin County. Few residents make the commute of more than an hour and a half to Forsyth County. The average commute time in 2002 for Alleghany County residents was 24.1 minutes.

Quality of Life	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>Safety</i>	High
<i>Commute times</i>	Moderate
<i>Retail choice</i>	Low
<i>Health care</i>	Moderate
<i>Community image</i>	Low
<i>Diversity of housing stock</i>	Low
<i>Recreation and Entertainment</i>	Moderate

The **Retail choice** in Alleghany is limited. Sparta is the capital but offers few retail choices beyond major staples. Many residents travel outside Alleghany, and even as far as Forsyth for diverse retail choices.

The **Health care** is good in Alleghany. There are approximately 12.2 physicians per 10,000 people, compared to Forsyth County (with their many hospitals) with 37.3 physicians per 10,000 people. An \$8 million expansion to the Alleghany Memorial Hospital is almost complete. There is a helicopter pad for services that need to be taken care of in Forsyth County but the hospital can take care of most medical needs. A wellness center is also being built in the County with 23,000 sq. ft offering and an indoor/outdoor swimming pool, a walking track, and exercise equipment.

The **Community image** is the one aspect of Alleghany with the most opportunity. Sparta has fantastic building facades with a very pedestrian friendly environment. One issue that needs to be addressed is getting building tenants that will draw visitors downtown. The other significant issue related to community image in Sparta is the highway that goes right through the downtown. One could argue that this brings visitors downtown, but in reality it creates a dangerous and unfriendly environment for pedestrians – who you want downtown. The Sparta Main Street organization has developed an out-of-date strategic plan to address Main Street, but it should be dusted off with financial backing for implementation. The strategies in this plan are good, but need to be implemented. Again, a few major tenants who will draw visitors downtown will provide the spark that is desperately needed to improve this image.

Outside of Sparta, the images of the County are very pastoral but are unfortunately blighted with occasional litter and commercial and industrial buildings that are boxy and built with corrugated metal siding. These are fortunately rare, but do take away from the breathtaking views throughout the County.

Alleghany actually has a fairly **diverse housing stock**, as the chart to the right demonstrates. More than 58 percent of all housing costs below \$100,000. Twenty-three percent of housing in the \$110-149K range represents a significant, and surprising stock for Alleghany. The only positive aspect of the 2nd home housing market to accommodate retirees has been the impact on the construction industry. Alleghany County has not experienced a significant increase in property tax or sales tax related to this growth. Additionally, these new houses, which are generally more expensive than existing houses have increased the property appraisals throughout the County. The potential negative side effect will be a reduction in available affordable housing. The County is exploring the possibility of developing an IDA (Individual development accounts) to address this affordable housing crisis.

less than 50k	247	11%
50-99,999	1065	47%
100k-149,999	524	23%
150k-199,999	228	10%
200k-299,999	116	5%
300k-499,999	71	3%
500k-999,999	13	1%
1M or more	16	1%

Parks and Recreation opportunities abound in and around Alleghany, but access to all the opportunities is limited within the County. The North Carolina portion of the New River is designated a National Scenic River and offers camping and other recreational opportunities along its shore. The Blue Ridge Parkway and Park are within the County but access is limited for Alleghany County to take advantage. The New River is an idyllic river but the water flow limits what it offers recreational enthusiasts.

Several golf courses are available for use in the County but are limited to public access. Other active recreation facilities include the Duncan Recreation Center for swimming and Davis Field for softball. Camping is available at Doughton Park as well as at a number of private campgrounds.

The Alleghany County fiddlers festival is an annual cultural event in Alleghany and can be built upon in hopes of developing an artists guild of sorts in the County. The Alleghany Community Theatre is also another cultural attribute of the County that can be built upon to enhance cultural amenities.

Factor 5: Economic Development Efforts

AE defines economic development efforts as the activities of local, regional and state organizations involved in any form of economic development activity. Factors explored include: external promotion and marketing, internal promotion, and resource allocation.

External promotion – Any activities aimed at developing the image of a community to non-resident individuals and companies. External promotion efforts include marketing or public relations, and can be aimed at expanding or relocating companies, skilled workers, entrepreneurs, site selectors and other business influencers, and tourists.

Internal promotion – Aimed at increasing awareness of and support for economic development within the local community. Successful internal activities are aimed at local businesses, media, and educators and result in a unified “voice” promoting a community as a good place for living and doing business.

Resource allocation – How effectively economic development funds are being used to generate new investment and long-term economic health within the community.

Alleghany County’s Ratings:

External promotion in Alleghany County has mostly been focused on tourism and the new business development center. The brochures that have been developed by Alleghany and Ashe counties for the New River, as well as the recent brochure on Blue Ridge Mountain Hospitality are focused on tourism development look very professional but are somewhat duplicative. The Blue Ridge Mountain Hospitality should serve the County well in reaching tourists, but when individuals request information on the County, a plethora of brochures is sent. The Alleghany Chamber of Commerce also maintains a website that offers visitors information about tourism and recreational opportunities in the County but is generic and not unique.

Economic Development Efforts	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>External promotion</i>	Moderate
<i>Internal promotion</i>	Moderate
<i>Resource allocation</i>	Moderate

Other external promotion is done by Advantage West, who is the regional economic development partner for the state that does business development and tourism marketing for a large region, including Alleghany County. Being a member of the High Country Host, the regional tourism marketing campaign of Advantage West, has proven to be successful for Alleghany. Advantage West was also instrumental in helping Alleghany County get Bristol Compressors as well as Martin Marietta.

Promotion for business development is not very good. The only literature geared towards this is for the Blue Ridge Business Development Center. This information is in the form of brochures, notebook packets and CD-Rom. The CD-Rom is exceptional and demonstrates the exceptional facilities of the Business Development Center. However, the promotion is generalized and not directed at any specific market.

Alleghany County also has succeeded with its **Internal Promotion** activities. In all the meetings we have attended, most everyone seems to be behind a shared vision for improving the economy in Alleghany County. Attendance at meetings has also been very high, for a County with the smallest population of the study. Everyone seems to be behind the Blue Ridge Business Development Center and wants to preserve the natural beauty of the County but improve the economy through some tourism (but "...not another Blowing Rock") and mostly existing business expansion and entrepreneurship.

Resources Allocated for Economic Development in Alleghany County have been geared mostly towards the Business Development Center and creating technological opportunities throughout the County. While arguably, this is a critical issue for Alleghany County to focus its economic development efforts on, focus has shifted away from more basic infrastructure needs such as water, wastewater, and road infrastructure – all of which will be crucial for Alleghany to develop/enhance if the County is to succeed in new business development and tourism expansion. The Countywide Chamber of Commerce is responsible for tourism in the County and produces excellent marketing materials.

Alleghany County is fortunate to have Blue Ridge Energies offices in Sparta. Not only does the facility offer meeting space for community events, but also economic development staff of the Coop is also an extension of County efforts and work effectively as both a regional and local source of economic development assistance. Blue Ridge is beginning a leadership program for Alleghany and other counties that should not only foster a sense of regionalism, but also help in developing new leadership throughout the counties.

Finally, the State Department of Commerce has a satellite office in Northwest North Carolina and staff acts as an extension of County economic development staff in providing assistance for business recruitment and business expansion. This is a good resource for a rural county.

APPENDIX ONE: Alleghany County Community Input

AngelouEconomics is pleased to present the results of the *Alleghany County Survey*, conducted from December 2002 to May 2003 as part of the Northwest North Carolina Comprehensive Economic Development Strategy (CEDS). AngelouEconomics elected to survey residents and companies independently in order to gain both perspectives on the local economy. Region-wide, over 1,400 surveys were submitted, with 91 surveys completed for Alleghany County. Of these, 14 responses were from corporations and 77 were from residents.

Summary of the Alleghany County Results

Like most counties in the 8-County CEDS region, Alleghany residents and companies place a high value on education, healthcare, and quality of life issues, and they perceive Alleghany to be successful in these areas. Both view effective government leadership as highly important for a place to live/work, but only companies view Alleghany's government leadership as one of the County's stronger points. Both companies and residents perceive the costs of living or doing business to be more than satisfactory, but generally desire an improvement in the economy and job situation. Respondents expressed high satisfaction with the community college system and view workforce programs as important and performing well.

Companies would like to see additional opportunities for entertainment and arts/culture, but residents are primarily concern with job-related issues (higher pay, career advancement, and job availability).

Alleghany County Companies' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Business Location	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Arts / Culture</i>
2 <i>K-12 Education</i>	<i>Family environment</i>	<i>Entertainment / Recreation</i>
3 <i>Family Environment</i>	<i>Effective Government Leadership</i>	<i>General Economy</i>
4 <i>Effective Government Leadership</i>	<i>Cost of Labor</i>	<i>Strong Economic Growth</i>
5 <i>Business Climate</i>	<i>Cost of Living</i>	<i>University</i>

Alleghany County Residents' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Low Crime</i>	<i>High Paying Jobs</i>
2 <i>Good Healthcare</i>	<i>Climate</i>	<i>Career Advancement Opportunities</i>
3 <i>Low Crime</i>	<i>Family Environment</i>	<i>Job Availability</i>
4 <i>Effective Government Leadership</i>	<i>K-12 Education</i>	<i>Strong Business Growth</i>
5 <i>Cost of Living</i>	<i>Community College</i>	<i>Arts / Culture</i>

The following tables show how Alleghany respondents rank each factor for “Importance” and “Local Condition” in Alleghany (or satisfaction). Each factor is ranked from High to Low based on its average score from all responses. A low number indicates a high ranking.

Companies

Rank by Importance / Local Condition

	Alleghany
Good Healthcare	1 / 22
K-12 ED	2 / 9
Family Environment	2 / 2
Effective Government Leadership	2 / 3
Business Climate	5 / 23
Availability of Quality Workers	5 / 10
Low Crime	7 / 1
Education	8 / 16
Cost of Utilities	9 / 16
General Economy	10 / 34
Image of City as a Place to do Business	10 / 28
Community College	12 / 13
Tax Cost	12 / 7
Cost of Labor	12 / 4
High Speed Internet	12 / 6
Workforce Training Programs	16 / 15
Good Value Housing	16 / 16
Workforce Recruitment / Retention	18 / 14
Regulatory Environment	18 / 10
Infrastructure	18 / 16
Strong Economic Growth	18 / 33
Cost of Living	22 / 4
Mobile Phone Service	22 / 24
Location for High Tech	24 / 21
State and Local Incentives / Assistance	25 / 10
Highway	25 / 30
Entrepreneurial Environment	27 / 16
Climate	28 / 7
University	29 / 31
Entertainment / Recreation	29 / 34
R&D Resources	29 / 26
Driving Time to Business Destinations	32 / 27
Proximity to Customers	33 / 25
Arts / Culture	34 / 36
Air Connectivity	35 / 31
Proximity to Suppliers	36 / 28

Residents

Rank by Importance / Local Condition

	Alleghany
K-12 ED	1 / 4
Good Healthcare	2 / 10
Low Crime	3 / 1
Effective Government Leadership	4 / 12
Cost of Living	5 / 6
Family Environment	6 / 3
Community College	7 / 5
Workforce Training Programs	7 / 8
Job Availability	9 / 23
Strong Business Growth	10 / 22
Good Value Housing	11 / 7
Career Advancement Opportunities	12 / 24
Entertainment / Recreation	13 / 19
High Paying Jobs	14 / 25
University	15 / 20
Equal Opportunity Based on Gender / Race	16 / 11
Image of City as a Place to Live	17 / 17
Location for High Tech Activity	18 / 16
Climate	19 / 2
Highway Service	20 / 15
Arts / Culture	21 / 21
High Speed Internet Connectivity	22 / 9
Driving Time to Business	23 / 13
Mobile Phone Service	24 / 14
Air Connectivity	25 / 18

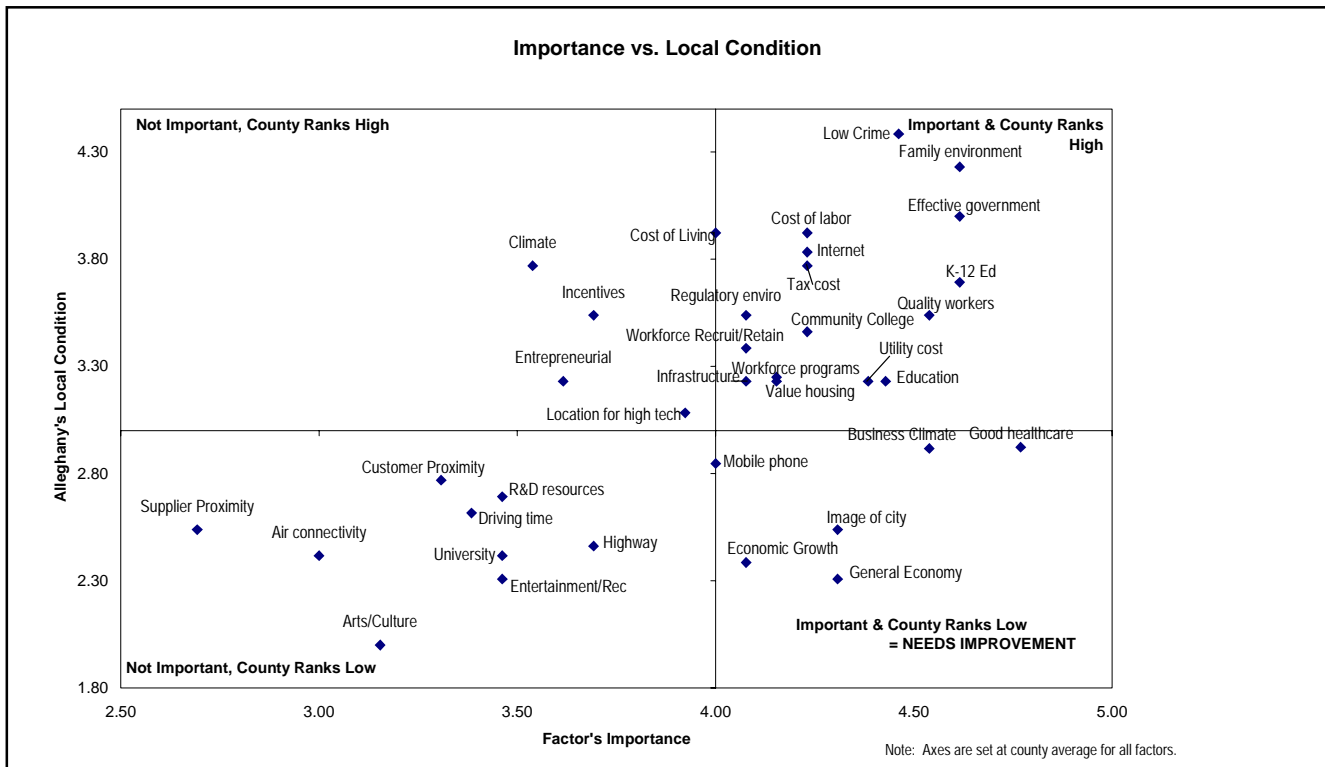
Companies

The following chart plots the results of two separate survey questions:

- “How important are the following factors to your business?” and
- “How would you rate your County on the following factors?”

The horizontal axis represents the factor’s “importance” rating, and the vertical axis represents the factor’s “local condition” within the County. Both axes are positioned at the region-wide average for all factors (Importance = 4, and Local condition = 3). For example, factors to the right of the vertical axis are of above-average “importance” to Alleghany companies. Factors in the bottom-right quadrant are of above-average “importance” and below-average “local condition”, suggesting a need for immediate improvement in Alleghany.

Looking at all factors, companies view K-12 education, government leadership, family environment, and good healthcare as the most important criteria for a business location. Healthcare is the only factor that ranks poorly in the top 5 important factors. Companies are pleased with some infrastructure-related issues such as Internet service and utility costs, but would like to see improved mobile phone service and possibly highway transportation. Companies would like to see some improvements in entertainment options, but they give a positive rating on their ability to recruit/retain/find workers. Companies do not perceive “Good value housing” as a strong positive for Alleghany, but rate most quality of life factors very favorably.



When asked, "*Are there any improvements you would like to see in your County?*" some responded with:

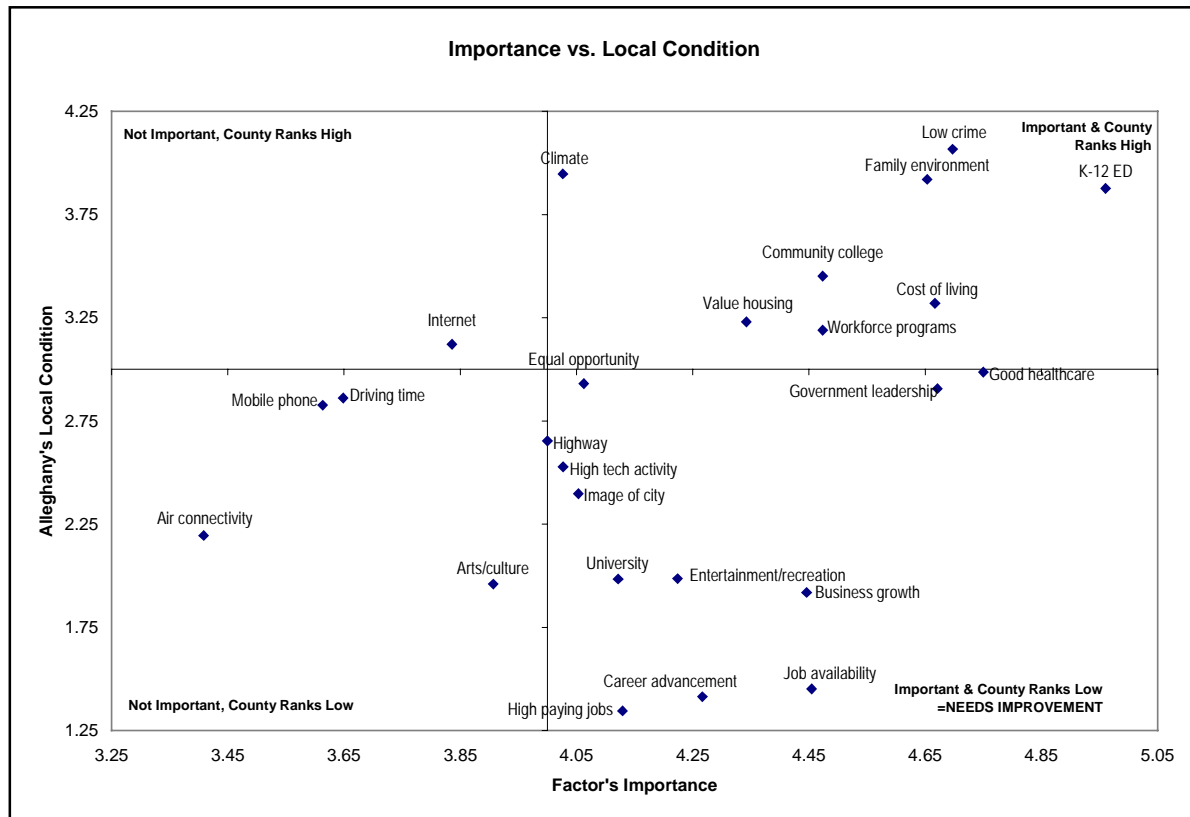
- "Expansion of mobile phone technology to support wireless Internet access"
- "Better technology training"
- "4-year colleges need to offer courses via the cyber campus"
- "More jobs for young people"
- "More vital downtown area"
- "Greater merchant involvement in efforts to revitalize downtown"
- "Big effort to increase tourism, pull existing travelers off the Parkway and into town"

Residents

Residents were asked similar questions on importance and satisfaction:

- "How important are the following factors to you?" and
- "How would you rate your County on the following factors?"

As with companies, the most important factor for residents is K-12 education, and they rank Alleghany very positively. Likewise, the most important and successful factors are family environment and low crime. Job-related concerns were rated the poorest (job availability, business growth, high paying jobs, career advancement), but Alleghany residents are generally less concerned about these issues than residents elsewhere in the region. Improved entertainment options are desired, as well as arts/culture to a lesser degree. Residents indicate that the image of the County could be improved. Overall, residents express a high level of satisfaction with the County's lifestyle, but desire greater economic opportunities. Both axes are positioned at the region-wide average for all factors (Importance = 4, and Local condition = 3).



When asked, "*Are there any improvements you would like to see in your County?*" some respond with:

- "We must be more small entrepreneur oriented to capitalize on the travel and tourism opportunities"
- "Downtown revitalization in Sparta, land use planning in Alleghany"
- "I would choose to improve the quality of life without compromising the environment"
- "Stronger arts and culture environment"
- "More incentives for business development and economic growth"

Other comments include:

- "Farmland preservation is of primary importance to many residents here"
- "Our strengths are our people, we have the best people anywhere, we need to move ahead"
- "We are ripe for innovative opportunities"

Summary of the 8-County Regional Results

In the 8-County CEDS region, residents and companies alike place a high value on education, healthcare, and low crime. While residents acknowledge that family environment and job situation are important criteria, they do not rank these issues in the top 3. Companies also recognize that a proactive government and strong economic growth are important to the business potential in the 8 counties.

Respondents identify the community college system and a safe family environment as areas of excellence for the counties, but expressed concerns regarding university, economic, and government issues. The lack of 4-year university options, economic opportunities, effective government leadership, and business resources are the top concern for respondents.

8-County Regional Summary: Companies		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Business Location	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>Strong Economic Growth</i>
2 <i>Low Crime</i>	<i>Low Crime</i>	<i>R&D Resources</i>
3 <i>Good Healthcare</i>	<i>Climate</i>	<i>University</i>
4 <i>Effective Government Leadership</i>	<i>Local Community College</i>	<i>Location for High Tech</i>
5 <i>Strong Economic Growth</i>	<i>Good Value Housing</i>	<i>General Economy</i>

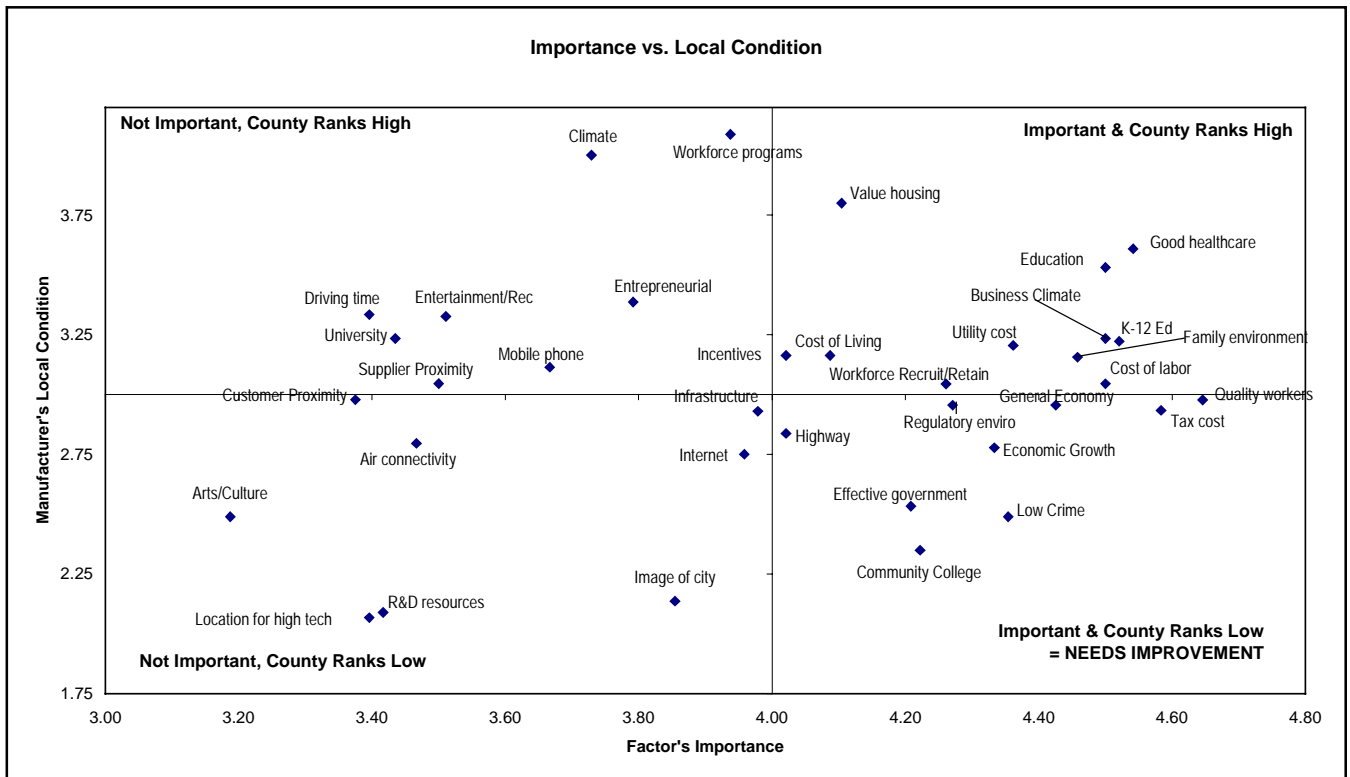
8-County Regional Summary: Residents		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>University</i>
2 <i>Low Crime</i>	<i>Local Community College</i>	<i>High Paying Jobs</i>
3 <i>Good Healthcare</i>	<i>Climate</i>	<i>Job Availability</i>
4 <i>Family Environment</i>	<i>K-12 Education</i>	<i>Strong Business Growth</i>
5 <i>Job Availability</i>	<i>Low Crime</i>	<i>Career Advancement Opportunities</i>

Manufacturers (Region-wide)

Manufacturers ranked "Availability of Quality Workers" as the #1 most important ("Cost of Labor" ranked #5), but were only moderately satisfied with region's ability to provide this workforce. Workforce training programs received high marks for their performance, but manufacturers ranked this factor of low importance, suggesting that few take advantage of them. Manufacturers ranked education factor well: both "Education" and "K-12 Education" were viewed as both important and satisfactory (#5 and #9). Surprisingly, manufacturers ranked the community college as #15 in importance and #33 in satisfaction, the lowest combined score of all corporate and resident respondents. This may suggest that manufacturers are less dependent on community colleges and less satisfied with the quality of the system than the general population.

Manufacturers expressed concern about the region's ability to retain and recruit a competitive workforce, and ranked "Entertainment/Recreation" as above-average for the region and "Arts/Culture" as below-average. Somewhat surprising, they placed "Family environment" as #8 in importance but #15 in satisfaction (the general population ranked it #1). Other quality of life factors were also rated poorly: "Low Crime" (#31), "Image of City as a Place to do Business" (#34). "Climate" was the top ranking lifestyle factor for the region (#2).

Manufacturers' satisfaction with economic issues fared slightly better: "Business Climate" ranked #11, while "General Economy" and "Strong Economic Growth" ranked #22 and #28. Manufacturers viewed the area's high tech resources in a more negative light, ranking "R&D Resources" and "Location for High Tech" as the lowest in overall satisfaction. Manufacturers are moderately satisfied with the region's business costs (utilities, labor, living) but view the cost of taxes below-average.



When asked, "*Are there any improvements you would like to see in your County?*" some respond with:

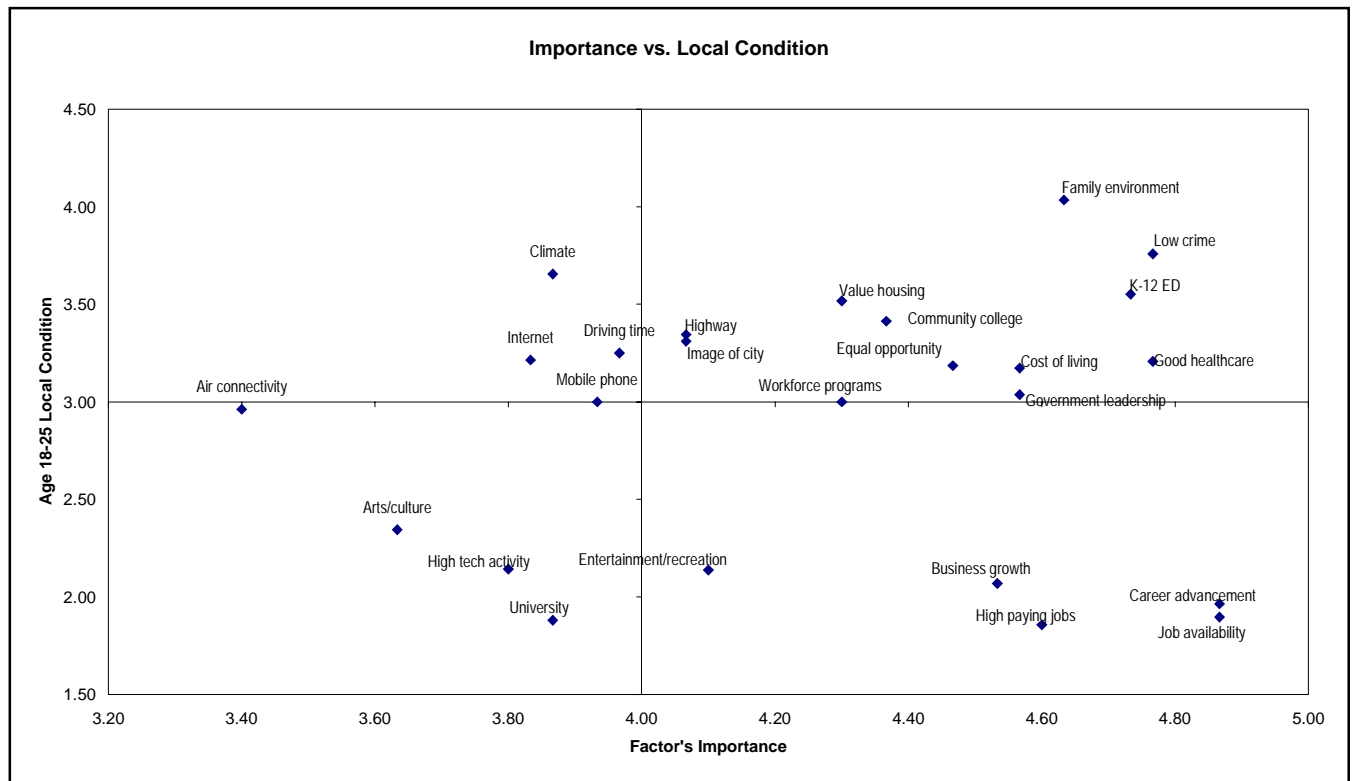
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our County"
- "The hope is that the decisions made today will improve the future for our County and the young people, which remain in our workforce"

Other comments include:

- "I would like to see us build on the strong points that we have and create jobs and businesses that could benefit from the workforce and education already present"
- "We should take note of all things rated below average or poor and make plans to improve them as we go forward"

Youth Demographic (Age 18-24) (Region-wide)

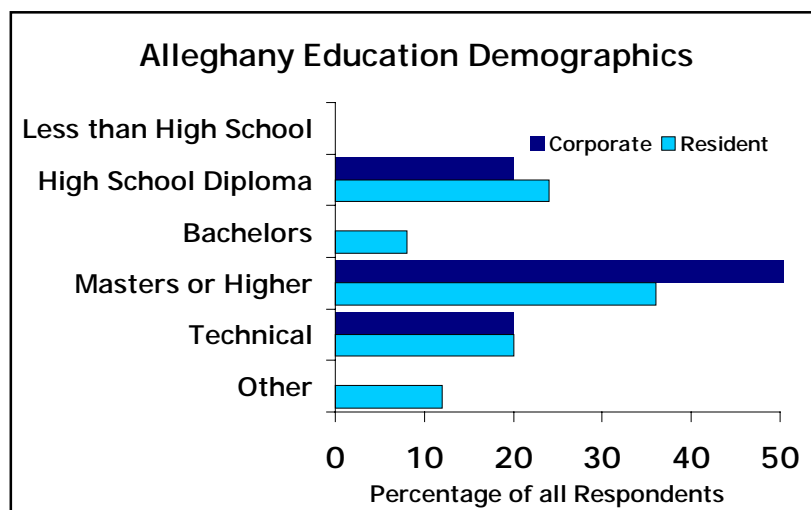
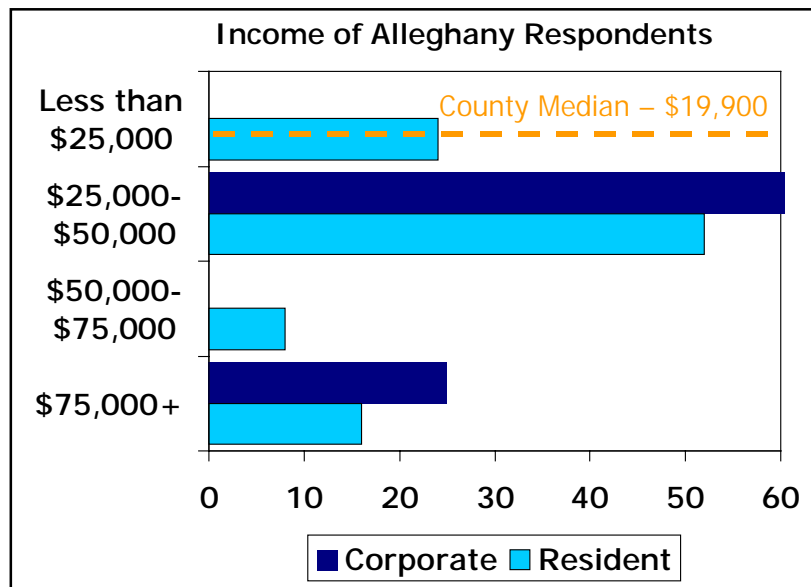
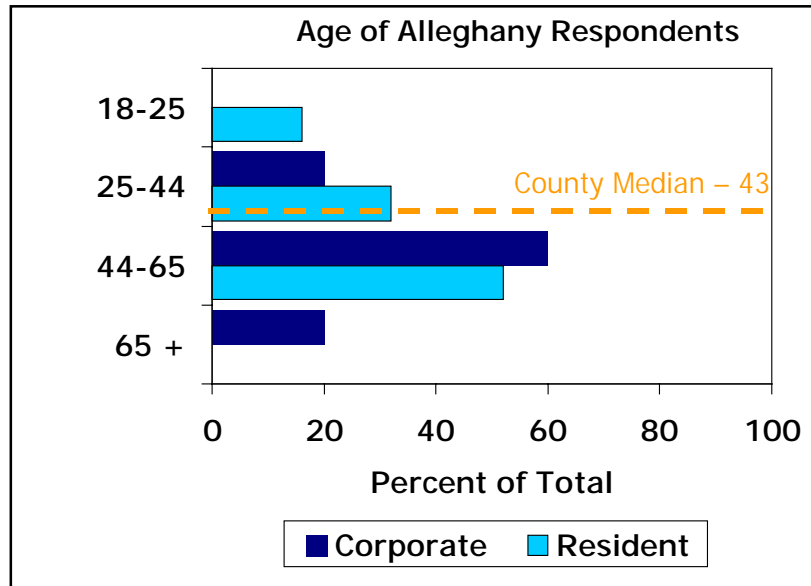
Not surprisingly, the region’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: “Family environment”, “Low Crime”, and “K-12 Education”. “Entertainment” and “Arts/Culture” rank low for local performance, but also rank relatively low in their list of priorities (although Entertainment still averages 4.0). The younger demographic is pleased with the quality of the community colleges locally and gives high marks to the value of housing. Surprisingly, interest in making the region a high tech location ranks relatively low, and “Air connectivity” is viewed as least important.

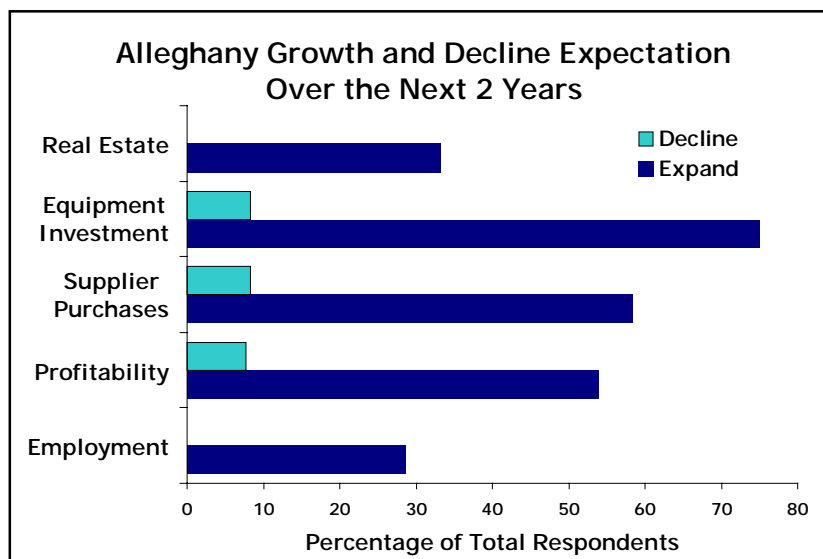
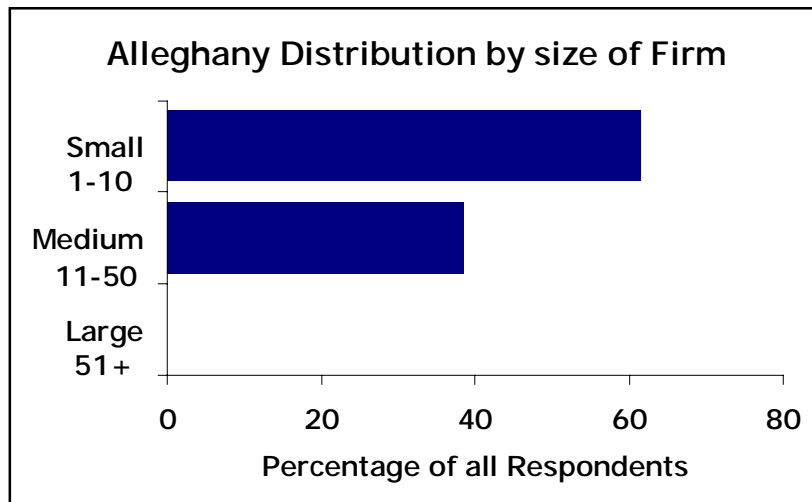
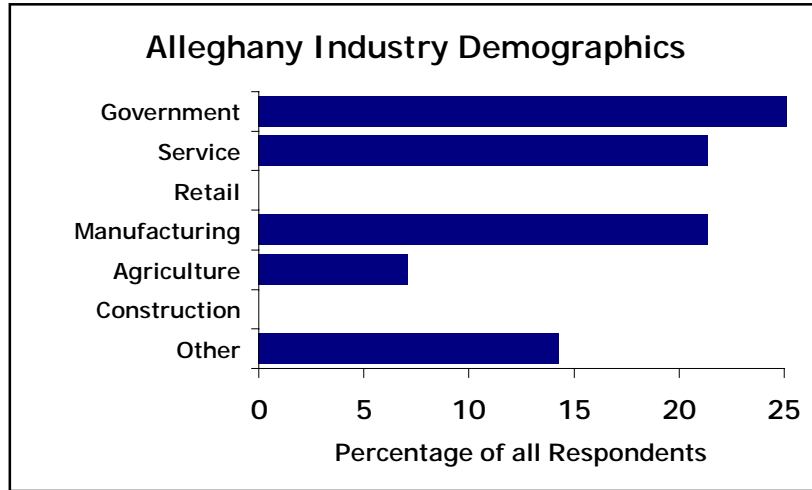


Respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

- “I would like to see more employment opportunities for young adults completing college. Right now, there’s not much to come back to.”
- “More arts and culture”
- “We need a nightlife”
- “It seems that people in the community do not look inside the community for opportunities”
- “We just need the jobs.”
- “It would be nice to see more established restaurants and hotels”

Demographic Profile of Alleghany Respondents





APPENDIX TWO: Summary Tables for All Counties

The following five tables summarize the company and residential survey results for all counties and demographics subgroups (Manufacturers, Residents 18-24, and Residents 25-44).

For companies, the first table shows each factor's ranking for "Importance" and "Local Condition". Respondents were asked to indicate each factor's level of importance on a scale of 1 to 5: 1 = Not important, 3 = Average Importance, 5 = Very Important. All respondents' scores were averaged for each factor, and factors were sorted based on this average. A high rank (low number) indicates a high level of Importance. The second column of each County/group shows the factor's ranking of average scores for "Local Condition" (1 = Poor, 5 = Excellent). A high rank (low number) indicates that the County performs well for this factor in the eyes of the respondent.

The second table shows the percentage of respondents that said the factor was Important. For each County or group, the first column shows the percent that selected "Somewhat Important" (4). The second column shows the percent that selected "Very Important" (5).

The two tables for Residents are organized similarly.

The final table shows how each County's rating for each factor ranks when compared to other counties in the region. A high rank (low number) indicates that respondents rating the factor more favorably than other counties.

**Companies: Rank of Factors
Rank of Average Scores**

Importance / Local Condition

	Alleghany	Ashe	Davie	Forsyth	Rockingham	Stokes	Surry	Yadkin	COUNTIES	ALL 8	Manufacturers
Education	8 / 16	7 / 7	3 / 6	5 / 18	4 / 18	3 / 9	2 / 9	2 / 21	3 / 10	3 / 10	5 / 5
K-12 ED	2 / 9	4 / 6	9 / 4	12 / 26	2 / 15	1 / 10	1 / 8	1 / 17	2 / 8	2 / 8	5 / 9
University	29 / 31	28 / 27	20 / 35	9 / 1	31 / 28	27 / 36	29 / 32	27 / 30	27 / 30	27 / 30	31 / 9
Community College	12 / 13	17 / 4	11 / 9	11 / 9	13 / 1	8 / 30	10 / 1	10 / 2	11 / 4	11 / 4	15 / 33
Workforce Training Programs	16 / 15	21 / 12	26 / 20	30 / 20	28 / 8	11 / 29	24 / 23	17 / 20	21 / 17	21 / 17	23 / 1
Workforce Recruitment / Retention	18 / 14	19 / 21	25 / 20	16 / 31	17 / 19	12 / 23	20 / 21	20 / 23	18 / 21	18 / 21	14 / 19
Cost of Living	22 / 4	13 / 15	17 / 7	19 / 11	14 / 5	14 / 5	15 / 13	14 / 8	15 / 6	15 / 6	18 / 13
Entertainment / Recreation	29 / 34	27 / 23	28 / 33	26 / 23	23 / 32	26 / 22	33 / 28	30 / 28	28 / 31	28 / 31	28 / 8
Arts / Culture	34 / 36	33 / 5	29 / 19	19 / 5	34 / 33	33 / 21	34 / 22	34 / 32	34 / 24	34 / 24	36 / 31
Law Crime	7 / 1	3 / 2	5 / 2	12 / 16	6 / 11	7 / 3	9 / 5	3 / 1	8 / 3	8 / 3	11 / 31
Good Healthcare	1 / 22	1 / 14	3 / 15	7 / 2	5 / 7	3 / 7	3 / 4	4 / 14	1 / 7	1 / 7	3 / 4
Family Environment	2 / 2	2 / 1	8 / 1	8 / 3	6 / 3	5 / 2	3 / 2	7 / 4	5 / 1	5 / 1	8 / 15
Climate	28 / 7	30 / 3	23 / 5	22 / 4	32 / 2	28 / 1	28 / 3	25 / 5	29 / 2	29 / 2	26 / 2
Good Value Housing	16 / 16	14 / 9	13 / 3	28 / 6	16 / 4	15 / 4	17 / 10	18 / 7	17 / 5	17 / 5	17 / 3
Business Climate	5 / 23	12 / 12	3 / 14	5 / 28	6 / 27	16 / 16	3 / 25	5 / 18	9 / 20	9 / 20	4 / 11
Tax Cost	12 / 7	9 / 8	12 / 10	19 / 33	11 / 23	20 / 8	12 / 19	13 / 15	12 / 16	12 / 16	2 / 24
Regulatory Environment	18 / 10	24 / 17	21 / 18	22 / 30	26 / 20	24 / 12	21 / 17	25 / 19	23 / 18	23 / 18	13 / 22
State and Local Incentives / Assistance	25 / 10	29 / 29	31 / 24	34 / 34	29 / 24	31 / 24	31 / 30	28 / 26	31 / 29	31 / 29	19 / 13
Proximity to Customers	33 / 25	25 / 11	17 / 17	27 / 12	19 / 12	13 / 14	30 / 11	31 / 11	24 / 13	24 / 13	35 / 20
Proximity to Suppliers	36 / 28	35 / 25	36 / 26	36 / 14	36 / 17	35 / 18	36 / 15	35 / 15	35 / 19	35 / 19	29 / 17
Availability of Quality Workers	5 / 10	11 / 26	10 / 22	9 / 24	12 / 20	9 / 13	11 / 29	8 / 22	10 / 22	10 / 22	1 / 21
Cost of Labor	12 / 4	20 / 10	14 / 16	18 / 21	20 / 9	21 / 6	21 / 12	15 / 10	19 / 9	19 / 9	5 / 18
Entrepreneurial Environment	27 / 16	17 / 19	22 / 30	31 / 29	25 / 26	22 / 27	23 / 24	22 / 26	22 / 27	22 / 27	25 / 6
Infrastructure	18 / 16	22 / 22	24 / 24	16 / 21	21 / 22	23 / 20	18 / 18	23 / 24	20 / 23	20 / 23	21 / 25
Air Connectivity	36 / 31	36 / 28	35 / 29	35 / 24	35 / 13	36 / 19	35 / 26	36 / 24	36 / 25	36 / 25	30 / 27
Highway	25 / 30	26 / 33	27 / 7	28 / 13	24 / 14	28 / 16	19 / 7	19 / 3	26 / 14	26 / 14	19 / 26
Driving Time to Business Destinations	32 / 27	34 / 24	32 / 11	32 / 10	33 / 6	34 / 15	32 / 6	32 / 6	33 / 11	33 / 11	33 / 7
Mobile Phone Service	22 / 24	23 / 32	29 / 28	33 / 8	18 / 25	25 / 31	24 / 16	24 / 13	25 / 26	25 / 26	27 / 16
High Speed Internet	12 / 6	15 / 18	19 / 11	12 / 6	15 / 10	16 / 25	13 / 14	14 / 9	14 / 12	14 / 12	22 / 29
Cost of Utilities	9 / 16	10 / 16	15 / 11	22 / 19	22 / 16	19 / 11	14 / 20	15 / 12	16 / 15	16 / 15	10 / 12
General Economy	10 / 34	5 / 31	1 / 26	3 / 36	9 / 36	9 / 28	7 / 35	6 / 28	7 / 34	7 / 34	9 / 22
Image of City as a Place to do Business	10 / 28	16 / 20	15 / 32	4 / 32	10 / 30	16 / 31	16 / 27	21 / 31	13 / 32	13 / 32	24 / 34
Effective Government Leadership	2 / 3	8 / 30	7 / 22	2 / 16	1 / 29	1 / 26	8 / 30	11 / 34	6 / 28	6 / 28	16 / 30
Strong Economic Growth	18 / 33	5 / 35	2 / 31	1 / 35	3 / 35	6 / 34	6 / 33	8 / 35	4 / 36	4 / 36	12 / 28
Location for High Tech	24 / 21	31 / 34	33 / 34	15 / 27	27 / 31	32 / 35	27 / 33	29 / 32	30 / 33	30 / 33	33 / 36
R&D Resources	29 / 26	32 / 36	34 / 36	22 / 15	30 / 34	30 / 33	26 / 35	33 / 36	32 / 35	32 / 35	32 / 35
Survey Respondents	14	73	31	26	66	29	50	36	325	325	48

Companies: Average Score for All County Respondents
 Average Score (1= Low, 5 = High)

Importance / Local Condition

	Allegheny	Ashe	Barke	Forsyth	Rockingham	Stokes	Surry	Yadkin	ALL 8 COUNTIES	Manufacturers
Education	4.4 / 3.2	4.6 / 3.3	4.5 / 3.8	4.6 / 3.5	4.7 / 2.9	4.6 / 3.3	4.8 / 3.4	4.7 / 2.8	4.6 / 3.2	4.5 / 3.5
K-12 ED	4.6 / 3.7	4.7 / 3.4	4.4 / 3.9	4.3 / 3.3	4.7 / 3.0	4.7 / 3.2	4.8 / 3.4	4.7 / 3.0	4.6 / 3.3	4.5 / 3.2
University	3.5 / 2.4	3.9 / 2.6	4.0 / 2.2	4.4 / 4.4	3.8 / 2.5	3.7 / 1.8	3.9 / 2.3	3.9 / 2.4	3.9 / 2.6	3.4 / 3.2
Community College	4.2 / 3.5	4.2 / 3.6	4.2 / 3.5	4.3 / 3.8	4.3 / 3.9	4.4 / 2.1	4.5 / 4.2	4.3 / 3.7	4.3 / 3.6	4.2 / 2.3
Workforce Training Programs	4.2 / 3.3	4.2 / 2.9	3.6 / 3.1	4.0 / 3.4	4.0 / 3.4	4.3 / 2.2	4.0 / 2.8	4.1 / 2.8	4.0 / 3.0	3.9 / 4.1
Workforce Recruitment / Retention	4.1 / 3.4	4.2 / 2.7	3.8 / 3.1	4.2 / 3.0	4.2 / 2.9	4.3 / 2.4	4.2 / 2.9	4.1 / 2.6	4.1 / 2.8	4.3 / 3.0
Cost of Living	4.0 / 3.9	4.4 / 2.9	4.0 / 3.7	4.1 / 3.7	4.3 / 3.5	4.2 / 3.4	4.2 / 3.2	4.2 / 3.4	4.2 / 3.3	4.1 / 3.2
Entertainment / Recreation	3.5 / 2.3	3.9 / 2.7	3.6 / 2.6	4.0 / 3.3	4.1 / 2.1	3.7 / 2.5	3.7 / 2.6	3.8 / 2.4	3.8 / 2.5	3.5 / 3.3
Arts / Culture	3.2 / 2.0	3.6 / 3.5	3.6 / 3.2	4.1 / 4.0	3.6 / 2.0	3.4 / 2.5	3.4 / 2.8	3.6 / 2.3	3.6 / 2.8	3.2 / 2.5
Low Crime	4.5 / 4.4	4.7 / 3.9	4.4 / 4.0	4.3 / 3.5	4.6 / 3.3	4.4 / 3.8	4.5 / 3.5	4.6 / 4.0	4.5 / 3.7	4.4 / 2.5
Good Healthcare	4.8 / 2.9	4.8 / 2.9	4.5 / 3.4	4.6 / 4.3	4.6 / 3.4	4.6 / 3.4	4.7 / 3.6	4.6 / 3.0	4.7 / 3.3	4.5 / 3.6
Family Environment	4.6 / 4.2	4.7 / 3.9	4.4 / 4.3	4.4 / 4.2	4.6 / 3.7	4.6 / 4.0	4.7 / 4.0	4.5 / 3.7	4.6 / 4.0	4.5 / 3.2
Climate	3.5 / 3.8	3.8 / 3.7	3.8 / 3.9	4.1 / 4.1	3.8 / 3.8	3.6 / 4.1	3.9 / 3.9	3.9 / 3.5	3.8 / 3.8	3.7 / 4.0
Good Value Housing	4.2 / 3.2	4.4 / 3.0	4.1 / 4.0	4.0 / 3.9	4.2 / 3.6	4.1 / 3.5	4.2 / 3.3	4.1 / 3.4	4.2 / 3.4	4.1 / 3.8
Business Climate	4.5 / 2.9	4.4 / 2.9	4.5 / 3.4	4.6 / 3.2	4.6 / 2.5	4.1 / 2.7	4.7 / 2.8	4.5 / 2.9	4.5 / 2.9	4.5 / 3.2
Tax Cost	4.2 / 3.8	4.5 / 3.1	4.2 / 3.5	4.1 / 2.8	4.4 / 2.8	3.9 / 3.3	4.4 / 2.9	4.3 / 3.0	4.3 / 3.1	4.6 / 2.9
Regulatory Environment	4.1 / 3.5	4.0 / 2.8	3.9 / 3.3	4.1 / 3.1	4.1 / 2.9	3.9 / 3.0	4.1 / 3.0	3.9 / 2.9	4.0 / 3.0	4.3 / 3.0
State and Local Incentives / Assistance	3.7 / 3.5	3.8 / 2.5	3.5 / 3.0	3.6 / 2.8	3.9 / 2.6	3.6 / 2.4	3.8 / 2.6	3.9 / 2.6	3.8 / 2.7	4.0 / 3.2
Proximity to Customers	3.3 / 2.8	4.0 / 3.0	4.0 / 3.3	4.0 / 3.7	4.2 / 3.2	4.2 / 2.8	3.9 / 3.3	3.8 / 3.2	4.0 / 3.2	3.4 / 3.0
Proximity to Suppliers	2.7 / 2.5	3.4 / 2.6	2.6 / 3.0	3.3 / 3.6	3.5 / 2.9	3.2 / 2.6	3.3 / 3.0	3.6 / 3.0	3.3 / 2.9	3.5 / 3.0
Availability of Quality Workers	4.5 / 3.5	4.5 / 2.6	4.2 / 3.1	4.4 / 3.3	4.3 / 2.9	4.3 / 2.8	4.4 / 2.6	4.5 / 2.7	4.4 / 2.8	4.6 / 3.0
Cost of Labor	4.2 / 3.9	4.2 / 3.0	4.1 / 3.3	4.2 / 3.4	4.2 / 3.4	3.9 / 3.4	4.1 / 3.2	4.2 / 3.3	4.1 / 3.3	4.5 / 3.0
Entrepreneurial Environment	3.6 / 3.2	4.2 / 2.8	3.9 / 2.9	3.8 / 3.2	4.1 / 2.5	3.8 / 2.3	4.1 / 2.8	4.0 / 2.6	4.0 / 2.7	3.8 / 3.4
Infrastructure	4.1 / 3.2	4.1 / 2.7	3.8 / 3.0	4.2 / 3.4	4.2 / 2.8	3.8 / 2.5	4.2 / 2.9	4.0 / 2.6	4.1 / 2.8	4.0 / 2.9
Air Connectivity	3.0 / 2.4	3.1 / 2.6	2.9 / 2.9	3.3 / 3.3	3.5 / 3.1	2.7 / 2.5	3.4 / 2.7	3.4 / 2.6	3.2 / 2.8	3.5 / 2.8
Highway	3.7 / 2.5	3.9 / 2.4	3.6 / 3.7	4.0 / 3.7	4.1 / 3.1	3.6 / 2.7	4.2 / 3.5	4.1 / 3.7	4.0 / 3.1	4.0 / 2.8
Driving Time to Business Destinations	3.4 / 2.6	3.6 / 2.6	3.5 / 3.5	3.7 / 3.8	3.7 / 3.4	3.3 / 2.8	3.7 / 3.5	3.7 / 3.4	3.6 / 3.2	3.4 / 3.3
Mobile Phone Service	4.0 / 2.8	4.1 / 2.4	3.6 / 2.9	3.6 / 3.9	4.2 / 2.5	3.7 / 2.0	4.0 / 3.0	3.9 / 3.1	4.0 / 2.8	3.7 / 3.1
High Speed Internet	4.2 / 3.8	4.3 / 2.8	4.0 / 3.5	4.3 / 3.9	4.3 / 3.3	4.1 / 2.3	4.3 / 3.2	4.3 / 3.4	4.2 / 3.2	4.0 / 2.8
Cost of Utilities	4.4 / 3.2	4.5 / 2.9	4.0 / 3.5	4.1 / 3.4	4.1 / 3.0	4.0 / 3.1	4.3 / 2.9	4.2 / 3.2	4.2 / 3.1	4.4 / 3.2
General Economy	4.3 / 2.3	4.6 / 2.5	4.6 / 3.0	4.7 / 2.7	4.5 / 1.8	4.3 / 2.2	4.6 / 2.0	4.5 / 2.4	4.5 / 2.3	4.4 / 3.0
Image of City as a Place to do Business	4.3 / 2.5	4.3 / 2.7	4.0 / 2.8	4.6 / 2.9	4.4 / 2.7	4.1 / 2.0	4.2 / 2.7	4.1 / 2.4	4.3 / 2.5	3.9 / 2.1
Effective Government Leadership	4.6 / 4.0	4.6 / 2.5	4.4 / 3.1	4.7 / 3.5	4.7 / 2.5	4.7 / 2.3	4.5 / 2.6	4.3 / 2.2	4.6 / 2.7	4.2 / 2.5
Strong Economic Growth	4.1 / 2.4	4.6 / 2.2	4.5 / 2.8	4.8 / 2.7	4.7 / 1.8	4.5 / 1.9	4.6 / 2.0	4.5 / 2.1	4.6 / 2.2	4.3 / 2.8
Location for High Tech	3.9 / 3.1	3.7 / 2.3	3.2 / 2.5	4.2 / 3.3	4.0 / 2.2	3.5 / 1.8	3.9 / 2.0	3.9 / 2.3	3.8 / 2.3	3.4 / 2.1
R&D Resources	3.5 / 2.7	3.7 / 2.1	3.1 / 2.0	4.1 / 3.6	3.8 / 2.0	3.6 / 1.9	4.0 / 2.0	3.6 / 2.1	3.7 / 2.2	3.4 / 2.1
AVERAGE RATING FOR ALL FACTORS	4.0 / 3.2	4.2 / 2.9	3.9 / 3.2	4.2 / 3.5	4.2 / 2.9	4.0 / 2.7	4.2 / 3.0	4.1 / 2.9	4.1 / 3.0	3.4 / 2.1
Survey Respondents	14	73	31	26	66	29	50	36	325	48

Companies: % Important
% of Respondents that rate factor as Important
% Somewhat Important / % Very Important

	Alleghany	Ashe	Danville	Forsyth	Rockingham	Stokes	Surry	Yadkin	COUNTIES	Manufacturers
Education	0.0 / 78.6	11.3 / 76.1	9.7 / 67.7	22.0 / 64.0	26.0 / 70.3	17.2 / 72.4	8.7 / 87.0	26.7 / 71.4	16.8 / 74	26 / 62.6
K-12 ED	7.7 / 84.6	11.3 / 81.7	12.9 / 67.7	28.0 / 62.0	15.9 / 76.2	10.3 / 79.3	6.5 / 89.1	17.6 / 76.5	13.5 / 77.2	15.2 / 69.6
University	46.2 / 16.4	24.6 / 29.1	31.0 / 34.5	32.0 / 56.0	30.2 / 33.3	27.6 / 31.0	26.7 / 37.8	36.3 / 32.4	29.6 / 36.2	23.9 / 17.4
Community College	61.5 / 30.8	21.1 / 66.3	40.0 / 40.0	41.7 / 45.8	34.4 / 51.6	25 / 67.1	28.9 / 60.0	30.6 / 65.6	31.5 / 52.4	37.8 / 44.4
Workforce Training Programs	38.5 / 38.5	25.4 / 50.7	29.0 / 29.0	25.0 / 41.7	23.4 / 45.3	24.1 / 65.2	19.1 / 46.8	37.1 / 45.7	26.1 / 45.5	42.8 / 29.2
Workforce Recruitment / Retention	46.2 / 30.8	23.2 / 65.1	22.6 / 35.5	23.3 / 45.8	26.6 / 53.1	24.5 / 48.3	31.1 / 46.7	25.0 / 50.0	26 / 48.6	34.8 / 47.8
Cost of Living	53.8 / 20.1	21.7 / 58.0	26.7 / 40.0	32.0 / 44.0	37.5 / 48.4	34.5 / 41.4	31.1 / 48.9	19.4 / 62.8	29.9 / 48.2	34.8 / 39.1
Entertainment / Recreation	46.2 / 7.7	26.7 / 28.6	35.5 / 19.4	52.0 / 22.0	32.8 / 39.1	34.5 / 20.7	21.7 / 28.3	30.6 / 27.8	31.8 / 30.6	27.7 / 19.1
Arts / Culture	30.8 / 0.0	36.2 / 25.4	29.0 / 22.6	36.0 / 40.0	28.1 / 28.1	37.9 / 17.2	14.9 / 25.5	19.4 / 30.6	26.5 / 25.6	12.5 / 16.7
Low Crime	23.1 / 61.5	14.3 / 80.0	22.6 / 61.3	28.0 / 52.0	25.0 / 65.6	31.0 / 65.2	25.5 / 61.7	22.2 / 69.4	22.9 / 66	27.1 / 54.2
Good Healthcare	23.1 / 76.9	12.9 / 84.3	29.0 / 61.3	36.0 / 60.0	31.2 / 65.6	31.0 / 65.5	31.9 / 68.1	16.7 / 72.2	25.4 / 70.5	27.1 / 64.6
Family Environment	23.1 / 69.2	12.7 / 80.3	19.4 / 61.3	24.0 / 60.0	26.6 / 64.1	31.0 / 62.1	19.1 / 74.5	19.4 / 63.9	20.9 / 68.7	20.8 / 62.5
Climate	38.5 / 7.7	29.4 / 29.6	32.3 / 25.8	36.0 / 40.0	26.6 / 26.6	31.0 / 20.7	21.3 / 40.4	38.9 / 27.8	32.2 / 29.1	18.8 / 33.3
Good Value Housing	53.8 / 30.8	33.8 / 62.1	48.4 / 32.3	40.0 / 32.0	33.3 / 46.0	41.4 / 37.9	48.9 / 36.2	41.2 / 38.2	40.3 / 41.2	37.5 / 37.5
Business Climate	30.8 / 61.5	16.9 / 69.0	45.2 / 51.6	24.0 / 68.0	23.4 / 67.2	31.0 / 44.8	27.7 / 70.2	25.0 / 66.7	26.9 / 64.2	25 / 66.7
Tax Cost	30.8 / 46.2	23.2 / 65.2	22.6 / 51.6	28.0 / 48.0	25.0 / 57.8	31.0 / 41.4	22.2 / 57.8	27.8 / 47.2	25.3 / 54.8	25 / 66.7
Regulatory Environment	30.8 / 38.5	24.6 / 42.5	30.0 / 33.3	48.0 / 32.0	28.1 / 42.2	28.6 / 32.1	37.0 / 41.3	36.1 / 30.6	31.5 / 38.3	27.1 / 50
State and Local Incentives / Assistance	15.4 / 30.8	24.6 / 39.1	16.1 / 29.0	16.0 / 36.0	28.1 / 35.9	35.7 / 28.6	31.9 / 31.9	36.1 / 30.6	26.8 / 33.9	35.4 / 37.5
Proximity to Customers	30.8 / 15.4	20.0 / 48.6	25.8 / 45.2	24.0 / 44.0	23.8 / 49.2	28.6 / 50.0	27.7 / 38.3	28.6 / 31.4	25 / 43.3	25 / 16.7
Proximity to Suppliers	23.1 / 7.7	21.4 / 25.7	16.1 / 9.7	40.0 / 8.0	23.8 / 23.8	17.9 / 25.0	19.1 / 23.4	28.6 / 22.9	22.1 / 20.8	25 / 18.8
Availability of Quality Workers	46.2 / 53.8	23.9 / 64.8	26.7 / 56.7	32.0 / 56.0	32.8 / 50.0	31.0 / 58.6	23.4 / 61.7	33.3 / 58.3	29.2 / 58.1	27.1 / 68.8
Cost of Labor	46.2 / 38.5	21.0 / 47.9	35.5 / 41.9	36.0 / 44.0	29.7 / 43.8	24.1 / 41.4	32.6 / 42.6	33.3 / 41.7	32.1 / 42.8	29.2 / 60.4
Entrepreneurial Environment	30.8 / 23.1	26.8 / 49.3	25.8 / 35.5	32.0 / 28.0	40.3 / 35.5	24.1 / 37.9	40.4 / 38.3	41.7 / 33.3	33.4 / 37.9	41.7 / 22.9
Infrastructure	30.8 / 38.5	25.7 / 45.7	43.3 / 23.3	45.8 / 37.5	35.9 / 42.2	25.0 / 35.7	38.6 / 43.2	42.9 / 34.3	35.1 / 39.3	53.2 / 23.4
Air Connectivity	18.2 / 18.2	20.0 / 18.5	13.8 / 6.9	32.0 / 20.0	20.6 / 23.8	7.1 / 10.7	20.0 / 22.2	31.4 / 14.3	20.6 / 17.9	20 / 20
Highway	46.2 / 15.4	36.7 / 37.1	26.7 / 23.3	32.0 / 36.0	34.4 / 39.1	27.6 / 31.0	36.2 / 42.6	48.6 / 34.3	35.5 / 35.1	41.7 / 31.2
Driving Time to Business Destinations	38.5 / 7.7	24.3 / 22.9	36.7 / 10.0	44.0 / 20.0	32.8 / 25.0	21.4 / 14.3	36.2 / 23.4	33.3 / 27.8	34.2 / 21.1	29.2 / 12.5
Mobile Phone Service	38.5 / 38.5	38.0 / 43.7	29.0 / 22.6	40.0 / 20.0	32.3 / 46.8	31.0 / 31.0	29.8 / 38.3	50.0 / 25.0	35.7 / 36	27.1 / 25
High Speed Internet	46.2 / 38.5	25.4 / 67.7	36.7 / 30.0	40.0 / 48.0	21.9 / 54.7	24.1 / 48.3	21.3 / 55.3	44.4 / 44.4	29.2 / 50.2	35.4 / 33.3
Cost of Utilities	46.2 / 46.2	27.1 / 61.4	46.7 / 33.3	40.0 / 36.0	34.9 / 39.7	41.4 / 34.5	26.2 / 46.8	30.6 / 44.4	35.5 / 45	31.9 / 53.2
General Economy	38.5 / 46.2	23.9 / 70.4	37.9 / 58.6	16.7 / 76.0	29.7 / 62.5	24.1 / 65.2	19.1 / 70.2	26.7 / 62.9	26 / 64.7	27.7 / 57.4
Image of City as a Place to do Business	23.1 / 53.8	24.3 / 57.1	40.0 / 33.3	20.0 / 72.0	18.8 / 64.1	31.0 / 44.8	25.5 / 48.9	25.0 / 41.7	25.2 / 53.2	27.1 / 33.3
Effective Government Leadership	38.5 / 61.5	22.5 / 70.4	36.7 / 53.3	12.0 / 80.0	23.4 / 73.4	31.0 / 69.0	29.8 / 61.7	27.8 / 58.3	26.3 / 67	37.5 / 45.8
Strong Economic Growth	15.4 / 46.2	16.9 / 74.6	35.5 / 54.8	16.0 / 84.0	17.2 / 75.0	25.0 / 64.3	19.1 / 72.3	27.8 / 61.1	21 / 69.5	29.2 / 54.2
Location for High Tech	46.2 / 30.8	29.0 / 33.3	30.0 / 10.0	24.0 / 52.0	31.2 / 39.1	35.7 / 14.3	31.9 / 36.2	37.1 / 34.3	31.8 / 32.5	29.2 / 16.7
R&D Resources	15.4 / 15.4	21.0 / 29.6	17.2 / 6.9	24.0 / 48.0	29.5 / 32.8	20.7 / 24.1	19.1 / 42.6	41.7 / 22.2	26.7 / 29.6	20.8 / 18.8
Survey Respondents	14	73	31	36	66	29	50	36	310	40

**Residents: Rank of Factors
Rank of Average Scores**

Importance / Local Condition

	Alleghany	Ashie	Davie	Forsyth	Rockingham	Stokes	Sunny	Yaokin	TOTAL	Residents 18-24	Residents 25-44
K-12 ED	1 / 4	3 / 3	2 / 2	1 / 12	1 / 10	1 / 6	1 / 4	1 / 10	1 / 6	5 / 4	1 / 4
University	15 / 20	18 / 21	23 / 25	11 / 2	20 / 18	17 / 24	16 / 20	15 / 24	18 / 20	20 / 24	20 / 21
Community College	7 / 5	12 / 5	13 / 10	17 / 6	9 / 1	11 / 19	5 / 1	8 / 5	11 / 4	12 / 6	12 / 5
Workforce Training Programs	7 / 8	14 / 10	14 / 16	22 / 17	12 / 9	12 / 17	13 / 12	12 / 16	14 / 13	13 / 15	14 / 15
Cost of Living	5 / 6	3 / 8	6 / 9	8 / 10	11 / 6	5 / 5	10 / 11	9 / 7	7 / 8	8 / 13	8 / 8
Entertainment / Recreation	13 / 19	20 / 19	18 / 20	13 / 15	18 / 19	21 / 13	22 / 19	23 / 18	20 / 19	15 / 20	15 / 19
Arts / Culture	21 / 21	25 / 7	25 / 18	18 / 8	25 / 21	25 / 15	23 / 18	25 / 21	24 / 18	24 / 18	25 / 18
Low Crime	3 / 1	2 / 1	1 / 3	2 / 13	4 / 8	2 / 3	2 / 5	2 / 3	2 / 3	3 / 2	2 / 3
Good Healthcare	2 / 10	1 / 12	4 / 12	3 / 1	2 / 13	3 / 8	3 / 8	3 / 15	3 / 9	3 / 11	3 / 12
Family Environment	6 / 3	6 / 2	3 / 1	8 / 3	7 / 4	7 / 1	6 / 2	4 / 2	4 / 1	6 / 1	5 / 1
Climate	19 / 2	21 / 4	16 / 4	23 / 4	22 / 2	22 / 2	19 / 3	20 / 1	21 / 2	20 / 3	22 / 2
Good Value Housing	11 / 7	11 / 11	10 / 8	12 / 11	14 / 3	14 / 4	14 / 9	13 / 4	12 / 6	13 / 5	11 / 7
Air Connectivity	25 / 18	24 / 16	24 / 14	24 / 14	24 / 11	24 / 9	24 / 15	24 / 14	25 / 14	25 / 17	24 / 13
Highway Service	20 / 15	17 / 17	15 / 7	19 / 15	17 / 12	15 / 11	18 / 10	17 / 8	15 / 10	16 / 7	17 / 9
Driving Time to Business	23 / 13	22 / 13	20 / 5	21 / 7	23 / 5	19 / 7	21 / 6	22 / 6	22 / 7	18 / 9	21 / 6
Mobile Phone Service	24 / 14	23 / 18	21 / 17	25 / 9	21 / 15	18 / 18	25 / 14	19 / 13	23 / 16	19 / 15	23 / 16
High Speed Internet Connectivity	22 / 9	16 / 15	19 / 11	20 / 5	19 / 7	20 / 14	20 / 13	18 / 9	19 / 11	22 / 10	19 / 11
Job Availability	9 / 23	5 / 24	7 / 23	4 / 24	3 / 24	5 / 21	4 / 25	5 / 19	5 / 24	1 / 23	4 / 24
Career Advancement Opportunities	12 / 24	8 / 23	8 / 22	6 / 22	8 / 22	8 / 22	9 / 23	11 / 20	8 / 23	1 / 22	7 / 23
High Paying Jobs	14 / 25	9 / 25	9 / 24	10 / 25	10 / 25	9 / 25	11 / 24	10 / 25	10 / 25	7 / 25	9 / 25
Equal Opportunity Based on Gender / Race	16 / 11	13 / 9	12 / 13	16 / 18	13 / 14	13 / 12	12 / 17	14 / 11	13 / 15	11 / 12	13 / 14
Image of City as a Place to Live	17 / 17	19 / 6	17 / 6	15 / 20	15 / 17	16 / 10	17 / 7	21 / 12	17 / 12	16 / 8	18 / 10
Effective Government Leadership	4 / 12	7 / 13	5 / 15	5 / 19	5 / 16	4 / 16	7 / 16	6 / 17	6 / 17	8 / 14	6 / 17
Strong Business Growth	10 / 22	10 / 22	11 / 19	7 / 23	6 / 23	10 / 20	8 / 22	7 / 23	9 / 22	10 / 21	10 / 20
Location for High Tech Activity	18 / 16	15 / 20	22 / 21	14 / 21	16 / 20	23 / 23	15 / 21	16 / 22	16 / 21	23 / 19	16 / 22
Survey Respondents	77	108	227	83	169	92	208	112	1077	31	314

Residents: Average Score for All County Respondents

Average Score (1=Low, 5 = High)

Importance / Local Condition

	Alleghany	Ache	Deale	Foycuth	Rockingham	Stokes	Sunny	Yadkin	TOTAL	Residents 19-24	Residents 25-44
K-12 ED	5.0 / 2.9	4.6 / 3.6	4.8 / 3.8	4.7 / 3.4	4.8 / 3.0	4.8 / 3.1	4.8 / 3.6	4.8 / 3.0	4.8 / 3.5	4.7 / 3.6	4.8 / 3.5
University	4.1 / 2.0	3.9 / 2.1	3.7 / 2.0	4.4 / 4.2	4.0 / 2.0	3.9 / 1.8	4.1 / 2.3	4.1 / 1.8	4.0 / 2.2	3.9 / 1.9	3.9 / 2.0
Community College	4.5 / 3.5	4.3 / 3.5	4.1 / 3.2	4.0 / 3.8	4.6 / 3.8	4.3 / 1.9	4.7 / 4.2	4.5 / 3.2	4.4 / 3.5	4.4 / 3.4	4.3 / 3.4
Workforce Training Programs	4.5 / 3.2	4.1 / 2.9	4.0 / 2.9	3.8 / 3.1	4.4 / 3.1	4.2 / 2.3	4.4 / 3.1	4.3 / 2.6	4.2 / 2.9	4.3 / 3.0	4.1 / 2.8
Cost of Living	4.7 / 3.3	4.6 / 2.9	4.5 / 3.4	4.4 / 3.5	4.5 / 3.2	4.6 / 3.3	4.5 / 3.1	4.4 / 3.2	4.5 / 3.2	4.6 / 3.2	4.5 / 3.3
Entertainment / Recreation	4.2 / 2.0	3.8 / 2.3	3.8 / 2.4	4.2 / 3.2	4.0 / 1.9	3.7 / 2.4	3.8 / 2.6	3.8 / 2.2	3.9 / 2.4	4.1 / 2.1	4.0 / 2.3
Arts / Culture	3.9 / 2.0	3.4 / 3.1	3.5 / 2.7	4.0 / 3.7	3.7 / 1.9	3.5 / 2.3	3.6 / 2.6	3.5 / 2.0	3.6 / 2.5	3.6 / 2.3	3.4 / 2.4
Law Crime	4.7 / 4.1	4.7 / 3.9	4.8 / 3.8	4.7 / 3.3	4.7 / 3.1	4.7 / 3.7	4.8 / 3.5	4.7 / 3.5	4.7 / 3.6	4.8 / 3.8	4.7 / 3.7
Good Healthcare	4.8 / 3.0	4.7 / 2.8	4.6 / 3.1	4.7 / 4.3	4.7 / 2.9	4.7 / 2.9	4.8 / 3.3	4.7 / 2.8	4.7 / 3.1	4.8 / 3.2	4.6 / 3.0
Family Environment	4.7 / 3.9	4.5 / 3.9	4.7 / 4.0	4.4 / 4.0	4.6 / 3.3	4.6 / 3.8	4.7 / 3.8	4.6 / 3.6	4.6 / 3.8	4.6 / 4.0	4.6 / 3.8
Climate	4.0 / 3.9	3.7 / 3.5	3.9 / 3.7	3.8 / 3.8	3.8 / 3.6	3.7 / 3.8	3.9 / 3.8	3.9 / 3.7	3.8 / 3.7	3.9 / 3.7	3.8 / 3.7
Good Value Housing	4.3 / 3.2	4.3 / 2.9	4.2 / 3.5	4.2 / 3.4	4.3 / 3.3	4.1 / 3.4	4.3 / 3.3	4.2 / 3.4	4.2 / 3.3	4.3 / 3.5	4.3 / 3.3
Air Connectivity	3.4 / 2.2	3.5 / 2.6	3.5 / 3.0	3.7 / 3.2	3.7 / 3.0	3.6 / 2.9	3.6 / 2.9	3.6 / 2.8	3.6 / 2.9	3.4 / 3.0	3.5 / 2.9
Highway Service	4.0 / 2.7	3.9 / 2.5	4.0 / 3.5	4.0 / 3.2	4.1 / 2.9	3.9 / 2.8	4.0 / 3.2	4.1 / 3.0	4.0 / 3.1	4.1 / 3.3	3.9 / 3.2
Driving Time to Business	3.6 / 2.9	3.6 / 2.7	3.7 / 3.6	3.9 / 3.7	3.8 / 3.2	3.8 / 3.0	3.8 / 3.3	3.8 / 3.2	3.8 / 3.2	4.0 / 3.3	3.8 / 3.3
Mobile Phone Service	3.6 / 2.8	3.5 / 2.5	3.7 / 2.9	3.4 / 3.6	3.9 / 2.7	3.8 / 2.2	3.5 / 3.0	3.9 / 2.8	3.7 / 2.8	3.9 / 3.0	3.8 / 2.8
High Speed Internet Connectivity	3.8 / 3.1	4.1 / 2.6	3.8 / 3.2	3.9 / 3.8	4.0 / 3.1	3.8 / 2.4	3.9 / 3.1	3.9 / 3.0	3.9 / 3.1	3.8 / 3.2	3.9 / 3.0
Job Availability	4.5 / 1.5	4.6 / 1.7	4.4 / 2.3	4.6 / 2.6	4.7 / 1.6	4.6 / 1.8	4.7 / 1.7	4.6 / 2.1	4.6 / 1.9	4.9 / 1.9	4.6 / 1.9
Career Advancement Opportunities	4.3 / 1.4	4.4 / 1.8	4.3 / 2.3	4.5 / 2.7	4.6 / 1.8	4.5 / 1.8	4.6 / 1.8	4.3 / 2.0	4.5 / 2.0	4.9 / 2.0	4.5 / 2.0
High Paying Jobs	4.1 / 1.3	4.4 / 1.5	4.3 / 2.1	4.4 / 2.5	4.5 / 1.5	4.4 / 1.7	4.5 / 1.7	4.4 / 1.8	4.4 / 1.8	4.6 / 1.9	4.5 / 1.8
Equal Opportunity Based on Gender / Race	4.1 / 2.9	4.2 / 2.9	4.2 / 3.1	4.1 / 3.1	4.3 / 2.7	4.1 / 2.7	4.4 / 2.7	4.1 / 2.9	4.2 / 2.9	4.5 / 3.2	4.1 / 2.9
Image of City as a Place to Live	4.1 / 2.4	3.8 / 3.3	3.9 / 3.5	4.1 / 3.1	4.2 / 2.4	3.9 / 2.9	4.0 / 3.3	3.8 / 2.9	4.0 / 3.0	4.1 / 3.3	3.9 / 3.1
Effective Government Leadership	4.7 / 2.9	4.5 / 2.7	4.6 / 3.0	4.6 / 3.1	4.6 / 2.4	4.6 / 2.3	4.6 / 2.7	4.6 / 2.3	4.6 / 2.7	4.6 / 3.0	4.5 / 2.6
Strong Business Growth	4.4 / 1.9	4.4 / 2.0	4.2 / 2.6	4.5 / 2.6	4.6 / 1.6	4.3 / 1.8	4.5 / 1.8	4.5 / 1.8	4.4 / 2.1	4.5 / 2.1	4.4 / 2.1
Location for High Tech Activity	4.0 / 2.5	4.1 / 2.2	3.7 / 2.3	4.2 / 2.8	4.1 / 1.9	3.7 / 1.8	4.1 / 2.1	4.1 / 1.9	4.0 / 2.2	3.8 / 2.1	4.0 / 2.0
AVERAGE RATING FOR ALL FACTORS	4.2 / 2.7	4.1 / 2.7	4.1 / 3.0	4.2 / 3.4	4.3 / 2.6	4.1 / 2.5	4.3 / 2.9	4.2 / 2.7	4.2 / 2.9	4.3 / 2.9	4.2 / 2.8
Survey Respondents	77	108	227	83	169	92	208	112	1077	31	314

Residents: % Important

% of Respondents that rate factor as Important

% Somewhat Important / % Very Important

	Alleghany	Acute	Duane	Forsyth	Rockingham	Stokes	Surry	Youth	TOTAL	Residents 18-24	Residents 25-44
K-12 ED	1.3 / 97.4	6.5 / 91.5	6.2 / 93.8	13.3 / 81.9	5.4 / 94.6	4.4 / 91.1	4.3 / 95.9	7.2 / 92.8	5.9 / 97.7	6.7 / 93.3	6.1 / 93.6
University	17.6 / 82.4	25.5 / 74.5	27.1 / 72.9	30.5 / 69.5	27.2 / 72.8	25.6 / 74.4	24.9 / 75.1	29.1 / 70.9	26.2 / 73.8	23.3 / 76.7	26.1 / 73.9
Community College	27.6 / 72.4	29 / 71	34.5 / 65.5	39 / 61	21.8 / 78.2	28.4 / 71.6	17.1 / 82.9	37.5 / 62.5	28.2 / 71.8	43.3 / 56.7	29.7 / 70.3
Workforce Training Programs	32.9 / 67.1	28.7 / 71.3	38.5 / 61.5	32.1 / 67.9	22.9 / 77.1	34.4 / 65.6	25.6 / 74.4	40 / 60	31.5 / 68.5	33.3 / 66.7	40.1 / 59.9
Cost of Living	17.3 / 82.7	24.1 / 75.9	20.9 / 79.1	32.5 / 67.5	26.4 / 73.6	18.2 / 81.8	27.3 / 72.7	35.1 / 64.9	25.2 / 74.8	23.3 / 76.7	27.1 / 72.9
Entertainment / Recreation	28.9 / 71.1	23.6 / 76.4	33.0 / 67.0	33.7 / 66.3	35.2 / 64.8	22.2 / 77.8	35 / 65	36.9 / 63.1	32 / 68	23.3 / 76.7	35.5 / 64.5
Arts / Culture	40 / 60	27.1 / 72.9	26.5 / 73.5	39.8 / 60.2	36.5 / 63.5	24.4 / 75.6	31.2 / 68.8	24.1 / 75.9	30.6 / 69.4	6.7 / 93.3	26.8 / 73.2
Low Crime	19.7 / 80.3	11.1 / 88.9	13.7 / 86.3	18.1 / 81.9	15.5 / 84.5	14.4 / 85.6	15.9 / 84.1	19.6 / 80.4	15.6 / 84.4	23.3 / 76.7	17.3 / 82.7
Good Healthcare	19.7 / 80.3	12 / 88	16.8 / 83.2	23.2 / 76.8	19.2 / 80.8	22.2 / 77.8	15.5 / 84.5	25.9 / 74.1	18.5 / 81.5	16.7 / 83.3	21.1 / 78.9
Family Environment	18.7 / 81.3	18.9 / 81.1	16.5 / 83.5	22.9 / 77.1	19.9 / 80.1	25.6 / 74.4	19.8 / 80.2	19.6 / 80.4	19.4 / 80.6	23.3 / 76.7	18.2 / 81.8
Clinical	34.7 / 65.3	24.1 / 75.9	31.7 / 68.3	38.6 / 61.4	35.4 / 64.6	31.1 / 68.9	34.6 / 65.4	37.8 / 62.2	33.4 / 66.6	26.7 / 73.3	31.8 / 68.2
Good Value Housing	34.2 / 65.8	30.6 / 69.4	27.4 / 72.6	45.8 / 54.2	35.3 / 64.7	36.4 / 63.6	38.5 / 61.5	39.4 / 60.6	35.3 / 64.7	26.7 / 73.3	33.1 / 66.9
Air Connectivity	28.2 / 71.8	29 / 71	33.0 / 67.0	34.1 / 65.9	30.7 / 69.3	28.7 / 71.3	24.5 / 75.5	27.3 / 72.7	29.4 / 70.6	36.7 / 63.3	29.9 / 70.1
Highway Service	36.8 / 63.2	32.7 / 67.3	42.9 / 57.1	49.4 / 50.6	38.7 / 61.3	43.7 / 56.3	38.9 / 61.1	45 / 55	40.8 / 59.2	40 / 60	44.5 / 55.5
Driving Time to Business	44.6 / 55.4	34.6 / 65.4	33.2 / 66.8	39.8 / 60.2	33.9 / 66.1	25.8 / 74.2	42.3 / 57.7	34.8 / 65.2	36 / 64	40 / 60	38.8 / 61.2
Mobile Phone Service	33.3 / 66.7	32.4 / 67.6	27.1 / 72.9	24.1 / 75.9	34.5 / 65.5	31 / 69	37.7 / 62.3	42 / 58	32.9 / 67.1	36.7 / 63.3	31 / 69
High Speed Internet Connectivity	37.0 / 63.0	25 / 75	20.9 / 79.1	30.1 / 70.0	34.1 / 65.9	21.3 / 78.7	35.9 / 64.1	37.5 / 62.5	29.9 / 70.1	23.3 / 76.7	26.4 / 73.6
Job Availability	24.2 / 75.8	17.1 / 82.9	22.6 / 77.4	32 / 68	14.4 / 85.6	15.2 / 84.8	19.8 / 80.2	26.8 / 73.2	21 / 79	13.3 / 86.7	20.5 / 79.5
Career Advancement Opportunities	40.0 / 60.0	18.3 / 81.7	27 / 73	31.5 / 68.5	21.2 / 78.8	22.7 / 77.3	27.4 / 72.6	39.1 / 60.9	26.9 / 73.1	13.3 / 86.7	27.7 / 72.3
High Paying Jobs	32.3 / 67.7	21.9 / 78.1	28 / 72	42.7 / 57.3	29.9 / 70.1	25 / 75	31.7 / 68.3	34.8 / 65.2	30.1 / 69.9	26.7 / 73.3	28.6 / 71.4
Equal Opportunity Based on Gender / Race	34.4 / 65.6	27.9 / 72.1	23 / 77	28 / 72	19 / 81	21.6 / 78.4	21.5 / 78.5	28.8 / 71.2	23.8 / 76.2	23.3 / 76.7	21.9 / 78.1
Image of City as a Place to Live	30.7 / 69.3	33.3 / 66.7	32.2 / 67.8	40 / 60	32.5 / 67.5	28.4 / 71.6	34.1 / 65.9	33 / 67	32.9 / 67.1	50 / 50	31.9 / 68.1
Effective Government Leadership	27.6 / 72.4	27.8 / 72.2	25.8 / 74.2	31.3 / 68.7	24.6 / 75.4	21.6 / 78.4	24.3 / 75.7	29.7 / 70.3	26.1 / 73.9	26.7 / 73.3	31.9 / 68.1
Strong Business Growth	29.7 / 70.3	20.8 / 79.2	35.1 / 64.9	30.9 / 69.1	28 / 72	26.7 / 73.3	23.7 / 76.3	37.5 / 62.5	29.2 / 70.8	23.3 / 76.7	32.9 / 67.1
Location for High Tech Activity	40.5 / 59.5	25.5 / 74.5	30.6 / 69.4	39.8 / 60.2	41 / 59	31.1 / 68.9	32.2 / 67.8	37.8 / 62.2	34.8 / 65.2	30 / 70	33.9 / 66.1
Survey Respondents	77	105	227	63	169	92	205	112	1073	30	313

Rank of County Satisfaction
Rank of County Average Scores for Each Factor

	Alleghany	Ashe	Boyle	Forsyth	Rockingham	Stokes	Surry	York	Yadkin
Companies									
Education	6	4	1	2	7	5	3	3	3
K-12 Ed	2	3	1	5	7	6	4	3	3
University	5	2	7	1	3	3	6	4	3
Community College	7	5	6	3	2	3	1	4	4
Workforce programs	3	5	4	1	2	3	7	6	6
Workforce Recruitment	1	6	2	3	5	3	4	7	7
Cost of Living	1	8	3	2	4	5	7	6	6
Entertainment/Rec	7	2	4	1	3	5	3	6	5
Arts/Culture	7	2	3	1	3	5	4	6	7
Low Crime	1	4	2	7	3	5	6	3	7
Good healthcare	7	8	5	1	3	4	2	6	6
Family environment	2	6	1	3	7	5	4	3	4
Clinical	5	7	4	2	6	1	3	3	3
Value housing	7	8	1	2	3	4	6	5	4
Business Climate	3	3	1	2	3	4	6	5	6
Tax cost	1	4	2	7	3	7	6	5	5
Regulatory enviro	1	8	2	3	7	4	5	6	6
Incentives	1	7	2	3	4	3	5	6	6
Customer Proximity	3	6	2	1	4	7	3	5	3
Supplier Proximity	3	7	4	1	5	6	2	3	3
Quality workers	1	8	3	2	4	5	7	6	6
Cost of labor	1	8	5	2	4	2	7	6	6
Entrepreneurial	1	4	3	2	7	3	5	6	6
Infrastructure	2	6	3	1	5	3	4	7	7
Air connectivity	3	7	3	1	2	5	4	6	6
Highway	7	8	3	2	5	6	4	1	1
Driving time	7	8	3	1	5	6	2	4	4
Mobile phone	5	7	4	1	6	3	3	2	2
Internet	2	7	3	1	5	3	6	4	4
Utility cost	3	7	1	2	6	5	3	4	4
General Economy	5	3	1	2	3	6	7	4	4
Incentive of city for business	5	3	2	1	7	3	4	6	6
Effective government	1	5	3	2	6	7	4	3	3
Economic Growth	3	4	1	2	3	7	6	5	5
Location for high tech	2	4	3	1	6	3	7	5	5
R&D resources	2	3	5	1	7	3	6	4	4

Residents

	Alleghany	Ashe	Boyle	Forsyth	Rockingham	Stokes	Surry	York	Yadkin
K-12 ED	1	3	2	5	7	6	4	3	3
University	4	3	5	1	6	3	2	7	7
Community college	5	4	6	3	2	3	1	7	7
Workforce programs	1	6	5	3	4	3	2	7	7
Cost of living	3	3	2	1	5	4	7	6	6
Entertainment/recreation	7	5	4	1	3	3	2	6	6
Arts/culture	7	2	3	1	3	5	4	6	6
Low crime	1	2	3	7	3	4	6	5	5
Good healthcare	4	3	3	1	6	5	2	7	7
Family environment	3	4	1	2	3	6	5	7	7
Clinical	1	3	5	3	7	4	2	6	6
Value housing	7	3	1	2	5	3	6	4	4
Air connectivity	3	7	2	1	3	5	4	6	6
Highway	7	3	1	3	5	6	2	4	4
Driving time	7	3	2	1	4	6	3	5	5
Mobile phone	4	7	3	1	6	3	2	5	5
Internet	3	7	2	1	4	3	6	6	6
Job availability	3	5	2	1	7	4	6	3	3
Career advancement	3	6	2	1	7	5	4	3	3
High paying jobs	3	6	2	1	7	5	4	3	3
Equal opportunity	3	4	2	1	3	7	6	5	5
Incentive of city	3	3	1	4	7	5	2	6	6
Government leadership	3	5	2	1	6	7	4	3	3
Business growth	4	3	2	1	3	6	5	7	7
High tech activity	2	4	3	1	7	3	6	5	6

