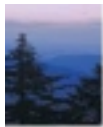


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT Analysis

Ashe County

August 2003

SWOT Outline

I. SWOT Analysis

- a. Overview
- b. Purpose of SWOT Report
- c. Key Findings

II. Factors

- a. Factor One: Business Climate and Entrepreneurship
- b. Factor Two: Workforce and Education
- c. Factor Three: Infrastructure
- d. Factor Four: Quality of Life
- e. Factor Five: Economic Development Efforts

III. Appendix: Survey Summary and Results

Ashe County SWOT Analysis

July 2003



AngelouEconomics is pleased to present the Ashe 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 *Ashe 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.

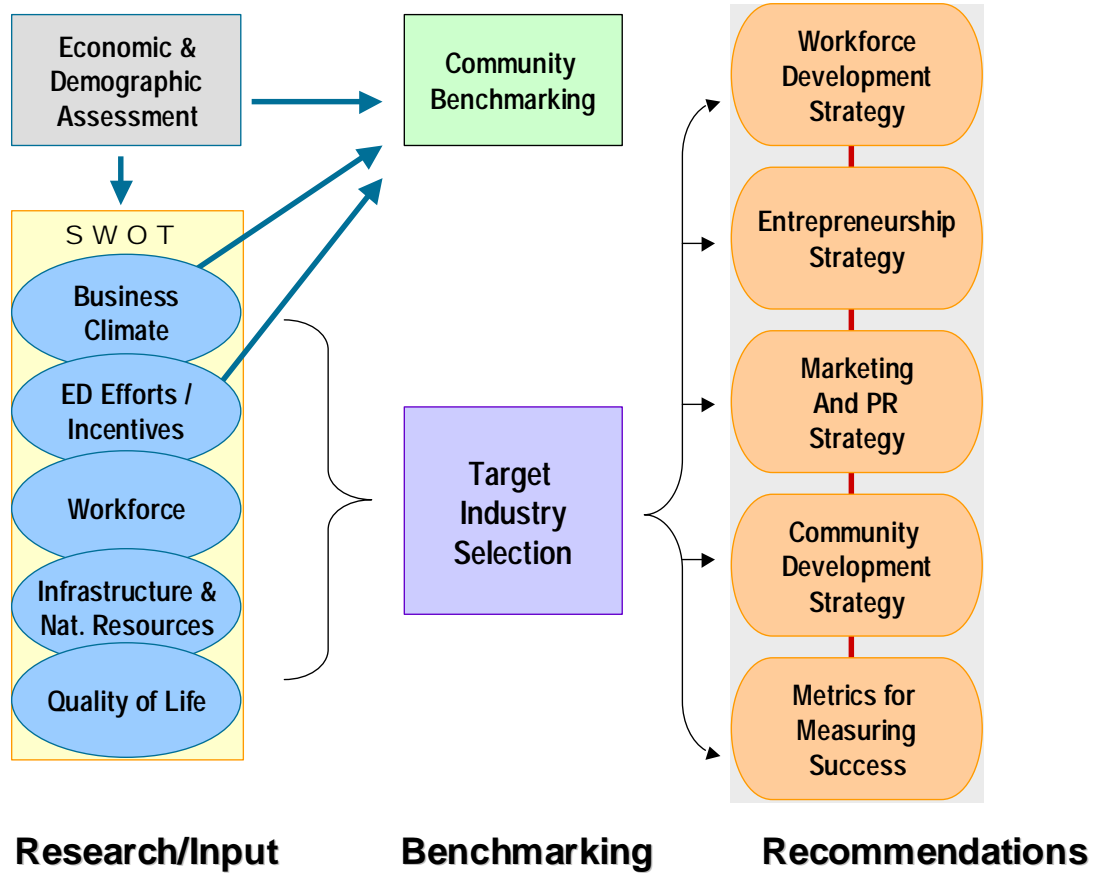
The *SWOT Analysis*, Report Two, takes the investigation of Ashe County's economic conditions one step further. First, it incorporates the *perceptions* of the county that the consulting team gathered during its interviews, focus groups, county tours, and on-line survey. It also considers how closely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

The community's perceptions of Ashe 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 Ashe 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 (e.g., 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 Ashe 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 – Ashe County's current state does not meet the needs of existing and future businesses and their workers.

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

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

Key Findings

The SWOT Analysis represents perceptions of Ashe 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.

| Ashe 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>Strong Family Environment</i> | <i>Access to R&D Resources</i> |
| 2 <i>Family Environment</i> | <i>Low Crime</i> | <i>Strong Economic Growth</i> |
| 3 <i>Low Crime</i> | <i>Climate</i> | <i>Location for High Tech Activities</i> |
| 4 <i>Good K-12 Education</i> | <i>Local Community College</i> | <i>Highway</i> |
| 5 <i>Strong Economic Growth</i> | <i>Arts / Culture</i> | <i>Mobile Phone Service</i> |

| Ashe 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>Good Healthcare</i> | <i>Low Crime</i> | <i>High Paying Jobs</i> |
| 2 <i>Low Crime</i> | <i>Strong Family Environment</i> | <i>Family Environment</i> |
| 3 <i>Good K-12 Education</i> | <i>Good K-12 Education</i> | <i>Career Advancement Opps.</i> |
| 4 <i>Low Cost of Living</i> | <i>Climate</i> | <i>Strong Business Growth</i> |
| 5 <i>Good Job Availability</i> | <i>Local Community College</i> | <i>University</i> |

While more than 70 people participated in focus groups, the on-line survey provided an opportunity for all residents of Ashe County to provide their thoughts on economic development issues. In total, 108 residents and 73 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.

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

- Coordination of economic development efforts
- Influx of retirees and second home owners
- Position within a regional economy

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

Coordination of economic development efforts

In December 2003, Ashe County revitalized its previously inactive economic development advisory board. Called the Economic Development Industrial Coordinating Board, the board is comprised of county commissioners, business people, and representatives from Blue Ridge Electric, Wilkes Community College and the Ashe County Chamber of Commerce. Funding for the EDIAB comes from the county.

During its initial meetings, the Board set goals and objectives. Workforce development and vocational education have been recognized as essential components of economic development. Importantly, members of the Board recognize that economic development today is no longer about recruiting large employers, but rather fostering an environment for small business growth.

The economic development strategy that will be developed in this CEDS process will provide the EDIAB with a roadmap for its own activities. It will help the EDIAB prioritize how and when it spends its resources. It will also offer new marketing themes that are targeted toward attracting and growing Ashe County's target industries. It is strongly recommended that the EDIAB delay the development of marketing collateral or Web-based information until after this plan is complete (estimated timing is October 2003).

The county also has the opportunity to hire a full-time economic development director. With a full-time staff person, Ashe County will be better able to establish its image within the wider region as a good place to live and grow businesses. First, a dedicated economic development director is a key ingredient for the county to build on the strengths and remedy the challenges highlighted in this report. Second, together with the EDIAB and other important economic development entities such as the Chamber of Commerce, the ED director will make it possible to implement the recommendations in the final CEDS plan. Most importantly, a single economic development representative will be responsible for facilitating communication between the many organizations in Ashe County that impact economic growth – from workforce developers and educators to tourist agencies and public officials.

In the final economic development strategy, the consulting team will be providing Ashe County with examples of successful structures around which an economic development team is organized and funded.

Influx of retirees and second homeowners

With its scenic beauty, Ashe County is quickly becoming a prime location for retirees and second homeowners. This trend has sparked a transition within the local economy, leading to a recent surge of home construction and retail development, with an average of 25-30 housing starts per month. In future years, this new population is expected to affect the dynamics within almost every industrial sector, creating new business opportunities and impacting the direction of economic development efforts.

During the 1990s, the in-migration of second homeowners and retirees has helped the county reverse its net population loss of the 1980s. Although Ashe County's population rise is still modest relative to the more urban counties in the CEDS study area, growth – and the expansion of retail and service companies to supply new residents – is expected to continue long-term.

The influx of retirees and second homeowners has also edged up Ashe County's median age. The percentage of residents over the age of 45 has increased while the portion ages 25-44 years old is steadily declining. This younger age group contains the workers that typically fuel information technology and creative businesses, and will therefore impact the types of businesses Ashe County should target in its economic development efforts.

Position within a regional economy

During the last 10 years, migration of workers into and out of Ashe County has increased, and the trend is expected to continue. Each day, 25% of Ashe County residents commute outside of the county for work. While Watauga and Wilkes Counties employ a large portion of these individuals, some Ashe County residents are going as far as Yadkin, Avery, or crossing the Tennessee state line into Washington County for work. Likewise, 12% of Ashe workers commute in from outside of the county on a daily basis.

| People | 1990 | 2000 |
|--|--------------|--------------|
| Working in Ashe | 8,863 | 9,423 |
| Live & work in Ashe | 8,257 | 8,288 |
| Live elsewhere & work in Ashe | 606 | 1,135 |
| % workforce commuting in | 7% | 12% |
| Live in Ashe & work elsewhere | 1,917 | 2,794 |
| % resident workers commuting out | 19% | 25% |

Workforce migration is just one indicator of the county's strong ties with its neighboring counties. Rural areas such as Ashe and the surrounding counties are particularly influenced by regional economic conditions.

Counties not only share workers, but infrastructure, quality of life, and tourist amenities as well. Improved conditions within a neighboring county can make the entire region a better place to live and provide new employment opportunities for residents. It can also entice taxpayers to move across county lines. For these reasons, it is essential that Ashe County consider its role within the broader region.

During focus groups and interviews, participants repeatedly voiced their view that Ashe County is linked to Winston-Salem and Forsyth County. Despite a driving distance of longer than one hour, residents stated that they consider Winston-Salem their primary shopping and entertainment destination. When discussing target industries, focus group participants considered Ashe a good destination for expansions of Winston-Salem based companies. This will impact not only the target industries recommended for Ashe County, but also with which communities Ashe County's economic development initiative works together.

Factor 1: Business Climate and Entrepreneurship Development

Definition

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 a county, towns and school districts

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

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

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

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

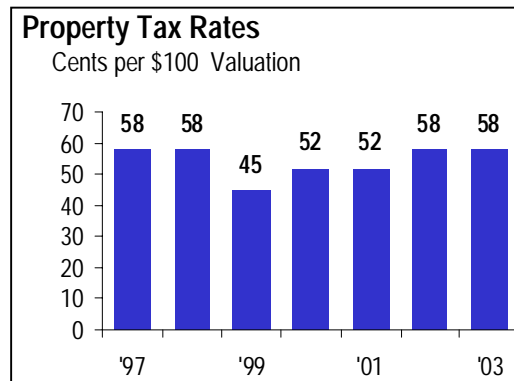
Incentive policy – Includes tax abatements, permitting fee waivers, and utility hook-up waivers

Ashe County's Ratings

Tax burden – Ashe County enjoys a relatively low property tax burden and has been able to maintain its county rate relatively constant over the years (\$0.58). West Jefferson has the highest town rate in the county, but the combined town/county rate still falls significantly lower than other counties 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 state line. Low property tax rates and high corporate income tax rates are generally conducive to an economy based on capital-intensive manufacturing. Without considering the effect of incentives, Ashe County's tax burden should be considered attractive to these types of

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



industries.

Regulatory Climate

The regulatory climate in Ashe County is pro-business and considered a strength for the county. Without zoning outside of town limits, businesses face few obstacles over where they locate. County and town governments are easily accessible; businesses seeking permits find it easy to contact and work with town and county officials.

However, minimal regulation in the county could impact Ashe County's land use and quality of life over the long-term. Several survey respondents expressed concern over the lack of a land use plan for the county and the threat that unchecked growth has on the ability to preserve the one of the county's greatest selling points – its natural beauty. A fresh attempt at creating a countywide land use plan should become a priority for Ashe County leaders. The plan should be tied to population and economic growth projections, so that the county is investing in infrastructure in areas appropriate for residential and business development, yet is protecting those areas that are essential to maintaining its pristine environmental quality.

Prior to the creation of a land use plan, the county could launch an internal campaign to educate residents about the benefits of planning. Leaders need to clarify the distinction between land use planning and architectural ordinances that caused controversy during the previous attempt.

Respondents also voiced concern over current personal land use issues; there is a perception that the number of "auto graveyards and other eye sores" is increasing. As one respondent noted, "attention to the details will keep our county fresh and attractive to new businesses and residents." This could be interpreted as a request for zoning and sensible regulations on the type of business activity permitted in Ashe County.

Industry Growth

Industry growth in Ashe County is considered a weakness. Employment fell 2.5% in 2001 and unemployment is up to nearly 10%. During the past five years, the county has lost numerous manufacturing jobs within its major employers, including Sara Lee, Jefferson Apparel, Thomasville Chair, Mr. Casuals, and Penery Manufacturing. Even so, the industry still comprises 22% of the county's employment – nearly double that of the U.S. average.

A portion of the manufacturing jobs lost with these companies' downsizing or plant closures has been replaced with service sector and construction jobs. Increased employment in both industries is a direct response to the number of new homes being built within the county. While the service sector has increased employment by nearly 50% during the past 10 years, its wage levels are below the county average. The construction industry, with wages slightly higher than average, has almost grown 100% since 1990.

In addition to construction, Ashe County has experienced growth in its Christmas tree industry. The agriculture industry comprises 15% of the county's total employment, significantly higher than the U.S. and North Carolina averages of around 4%. Involving up to 500 farmers within the county, Christmas trees are creating significant revenue for some locals. Yet, sustaining the industry long-term will be difficult. The trees are detrimental to the soil, and a plot of land can only support three rounds of harvesting.

While today's employment growth is weak, the seeds for future growth are in place. Jefferson, for example, is home to McFarland book publishing and several design-oriented businesses have started-up within the county, including screen-printing and a bike frame manufacturer. During the focus groups, one local metal cutting company executive mentioned his company's rapid employment growth. The Villages of Ashe and future senior care or medical facilities could provide a core for industry growth. Tourism-related businesses are another strong opportunity.

Location

Ashe County's location is both a strength and a weakness. Its rural atmosphere and natural scenery have attracted new residents and created a positive outside perception of the community as being a scenic getaway. The county's physical distance from major markets, and, in particular, the poor condition of its roadway infrastructure, threatens its ability to support companies that require rapid distribution of products.

Entrepreneurial Climate

Enhancing Ashe County's climate for entrepreneurship is a significant opportunity. The elements of an entrepreneurial climate are already in place – the county is viewed as a top destination for residents. Based on the new homes being constructed, Ashe is an ideal location for early retirees and business executives who are looking for an escape from big city bustle. These individuals could become the fuel for new companies and entrepreneurial support infrastructure.

A good example of a local entrepreneurial success is BREW Bikes. The 16-employee company started as Blue Ridge Electric and Welding and over the years has transformed itself into a world class bike frame and components company. Today, its new facility in the Ashe County Industrial Park has the capacity to build 12,000 frames per year.

Many survey respondents described their desire for the county to focus more on small business growth rather than recruiting large employers. Several good recommendations for improving Ashe's entrepreneurial environment were offered by respondents. One individual stated, "local organizations, including local governments, often fail to take advantage of resources within local businesses." Another respondent continued this thought by suggesting that county leaders support programs that "train people who want to operate their own businesses." A few individuals recommended that Ashe leaders create a business resource center modeled after ones found within neighboring counties.

Wilkes Community College's entrepreneurship program teaches potential business owners about bookkeeping and small business finance. This is a good asset that could be expanded. Should small business growth be a priority for Ashe County economic developers, this program should be actively promoted throughout the county. Involving local business executives and knowledgeable retirees in "coaching" new business start-ups is another opportunity. A local SCORE "Counselors to America's Small Business" chapter could be established to provide a formal structure for volunteering. The closest SCORE chapter in North Carolina is located in Asheville (www.SCORE.org). Ashe County is also located within the service area of the Region D Development Corporation (staffed by the High Country Council of Governments) which can provide fixed rate long-term financing, for eligible small businesses, through the SBA 504 Loan Program. Their offices are located in Boone.

Incentives

Ashe County currently lacks a targeted incentives package. In the past, towns within Ashe County have partnered with Blue Ridge Electric Membership Cooperative, Ashe County, and Ashe County Job Development to provide cash incentives and utility upgrades to local employers. It is estimated that companies that have recently received incentives, have created \$12.5 million in capital investment and 300 new jobs.

The county has an opportunity to customize incentives packages around the industries its economic development program targets. Non-financial inducements should be considered as part of these packages. Many communities, for example, consider access to entrepreneurial resources (financing, business incubators, or R&D) a part of inducement packages.

Companies located in North Carolina face a high income tax burden relative to Virginia, Tennessee, and South Carolina. The State offers numerous tax 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, for example, invest in business parks and "shovel-ready" sites that provide adequate infrastructure to meet the needs of target industries. They may also work together with local educators to customize training programs to better prepare local workers for target businesses. These two examples are popular alternatives to cash grants and tax abatements.

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

Definition

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 Ashe County'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 training facilities – 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.

Ashe County's Ratings

K-12 Education

Both Ashe County businesses and residents named K-12 education as a top five location factor as well as a top five strength of Ashe County. Within the region, Ashe County is perceived to provide excellent K-12 education to its residents. Maintaining a quality system will be essential to retaining the county's businesses and residents.

| 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 training</i> | Moderate |
| <i>Labor pool</i> | Moderate |
| <i>Educational attainment levels</i> | Low |

Within the survey comments, several businesses expressed an interest in seeing Ashe County high schoolers graduating with better occupational and life skills. Some respondents indicated that while graduates are "book smart," they sometimes lack basic customer service skills. This presents the county with an opportunity to enhance vocational, on-the-job, or career training exercises during K-12 education.

Some programs exposing students to the work environment and local professionals are already in place, including 4-H, the 4-H Ashe Youth Connection, ASU's Upward Bound, the Ashe County Arts Council, the Chamber's Youth Leadership Program, and Ashe County Hospital's "candy striper" program and links to local nursing training programs.

Higher Education and Workforce Training

Wilkes Community College was ranked as a top five strength within Ashe County by businesses responding to the survey. One respondent addressed the need to continue improving the programs offered at WCC, ensuring that the programs are tuned into the workforce needs of local employers. Other individuals requested increased high tech training and for WCC to become a center for R&D resources shared by local companies. WCC is also involved with providing technical training to local high school students.

Ashe County's close proximity to Appalachian State University is a strength, serving as a source for skilled workers and high tech resources not available at WCC. "ASU graduates move to Ashe County because they like snow sports, the mountain air, the livable summers, and local arts and performers," cited one survey respondent. The lack of jobs, however, was considered to be the top issue standing in the county's way of drawing in more young professionals from ASU and other universities in the area.

The Workforce Investment Act (WIA) is the county's top source of workforce development funding for employers in the area. However good workforce development programs are, 31.4% of Ashe County residents do not have a high school diploma. On this front, the entire CEDS study area does not fare well when compared against the U.S. – 17% of the adult population nationwide does not have a high school degree. Many individuals without a high school diploma are not comfortable returning to a traditional school setting to complete their degree, even if it means that job opportunities pass them by. *Identifying creative methods for encouraging older individuals to engage in GED preparation courses will be an objective of the final CEDS strategies.*

The upcoming Family Central will be a tremendous strength, expected to become a center for workforce training, education, and recreation in the county. Opened in 1997, it occupies 69,000 square feet of space at the old Ashe Central High School building. The Family Central facility houses the Ashe County Partnership for Children, human services providers, the Employment Security Commission, GED instruction, apprenticeship programs, a Job Link center, a computer center, a day care center and indoor and outdoor facilities for Ashe County Parks & Recreation. The facility's cafeteria is utilized by various groups for family reunions, receptions, church picnics and other special events. The facility has the opportunity to continue expanding its services. In the future, it could become a location for many other activities, such as a small business incubator or entrepreneurship training for high school students. In 2001, Skyline Telephone Membership Corporation pledged to donate \$30,000 over a three-year period to renovating the facility. Complete renovation of Family Central is expected by 2004.

While many good workforce-training programs are present in Ashe County, local companies and training providers seem disconnected. Many local companies indicated that they lack information about what programs are available within the community. When a training need arises, several employers stated that they do not know which individual or organization can help them identify a training program or funding source to incentivize their workforce development activities.

Labor Pool

Survey respondents and focus group participants all describe Ashe County residents as being hard working and loyal employees who take great pride in their work. Companies in Ashe County experience a low worker turnover. 22.4% of workforce is considered “professional” while 2.3% of documented workers are employed in the agriculture sector.

In addition, Ashe workforce is affordable and does not demand higher incomes as residents in larger nearby counties. Ashe’s per capita income in 2000 was \$21,600 while Forsyth’s was \$23,000. The study area as a whole is still much less expensive than the Charlotte and Raleigh-Durham areas, where per capita incomes are around \$27,000 annually. A low cost labor pool is both a positive and a negative. Some survey respondents mentioned the challenge of recruiting quality applicants for public and private jobs because wages in the county are lower than surrounding areas.

With an unemployment rate nearing 10%, Ashe County has ample workers to supply new employers or expanding local businesses. Its high unemployment rate is a result of recent company closings and slowed job growth. Retraining these workers to better meet the needs of future business is one of the county’s most urgent issues to address today.

Eighteen percent of Ashe County residents are aged 65 or older, with a median county age of 42. While this growing elder population tends to be wealthier and stable, the aging trend will dramatically affect the county’s labor pool long term. The county will soon find itself with an older population demanding more services and a shortage of working age to supply those services. The younger demographic will also become necessary to compete in virtually every economic arena (including manufacturing) as processes become more high-tech. The portion of residents between the ages of 25-44 is at 27 percent; high-growth, technically driven communities have this number near 33 percent.

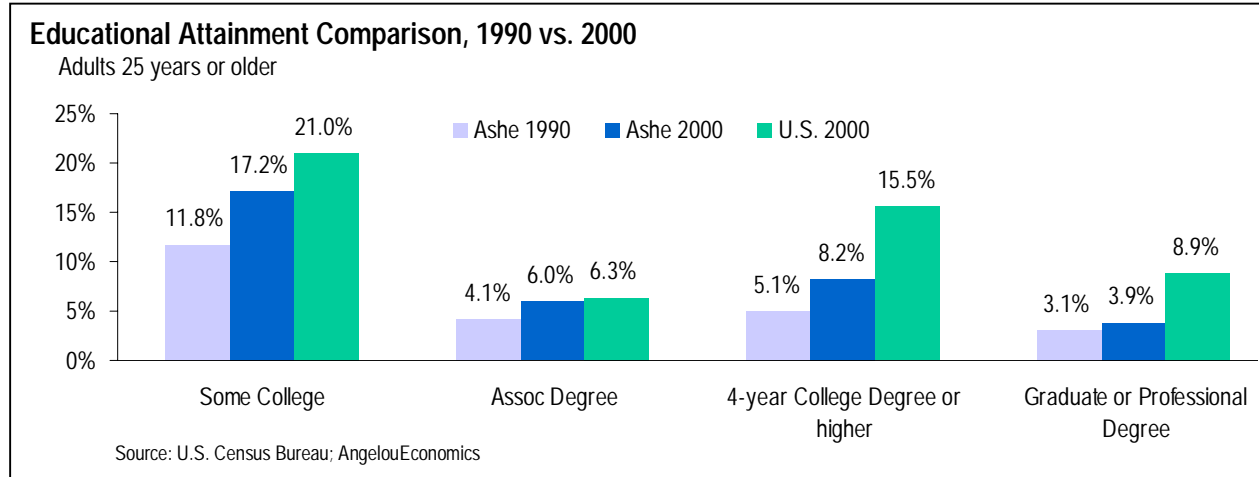
With fewer and fewer young professionals, Ashe could consider a two-pronged economic development effort. One strategy could involve improving the county’s entertainment and lifestyle characteristics so that they are more in-tune with the needs of young adults. This could be as simple as promoting the development of central gathering places such as restaurants, coffee shops, and adult sports programs. The average American spends 43 percent of his/her food budget in restaurants, eating out an average of 4.2 times per week. How often would an Ashe resident have to repeat restaurants in a month?

The other strategy could target businesses that provide services to and employ the retiree population. Retirees could provide valuable mentoring to Ashe County entrepreneurs and residents contemplating future career options.

Educational Attainment Levels

Though improving, the percentage of Ashe County population with a college degree or higher is still almost half that of the U.S. average. The county is stronger in its percentage of residents with some college education (17.2%). This population segment has dramatically increased since 1990 – likely attributed to the influx of second homeowners into the county.

Although the population of 4-year degree holders in Ashe County is low, the percentage of residents with some college or technical training is nearing the U.S. average.



Factor 3: Infrastructure and Land Use

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

Land – The costs and availability of commercial and industrial land

Transportation infrastructure – Town and county transportation infrastructure, which 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.

Ashe County's Ratings

Land

Ashe County has several small greenfield sites available for development. The Beaver Creek Industrial Park and Jefferson Apparel property combined provide 20 acres with some utility infrastructure in place for business expansions. The hilly terrain makes it difficult to identify a large, flat site for development. But that same attribute makes the county an attractive place for small to medium sized offices and park-like business campuses.

| 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> | High |
| <i>Available buildings / sites</i> | Moderate |

For the county, the development of land may be more expensive than its neighboring counties.

Transportation Access

Poor roadway infrastructure was mentioned as a weakness of Ashe County by many businesses and residents responding to the survey. According to the Department of Transportation, 29% of Ashe County roads are unpaved of the 840 miles of state maintained roads. Numerous individuals requested that the county expedite the expansion of Highway 221 to four lanes and connect it to Highway 421.

Ashe County's commuter airport was mentioned as a strength. With its 4,300-foot runway, the airport can accommodate a variety of corporate jets. Its capacity is expected to expand even more within the next few years, when grant funding for the airport will raise to up to \$6 million and its runway expanded to 5,000 feet.

Telecommunications

Both mobile phone service and high speed Internet were listed among Ashe County's top five weaknesses by local businesses and residents. Ensuring excellent telecommunications infrastructure is critical to the county's business climate, particularly for small business growth.

Although survey responses indicated that the county has limited high-speed access, the situation is actually quite good. Skyline Telephone Membership Corporation's service area has covered the entire county outside of the towns of Jefferson and West Jefferson, and now the company has received approval to provide service within town limits. Ninety percent of Skyline members have access to DSL service. In addition, a local company, Fastransit, is currently developing wireless high-speed access in coordination with North Carolina's Rural Internet Access Authority.

The county government and other public offices have embraced high speed and wireless Internet. The county government building, for example, is wired with T-1 lines on all floors and is covered by a wireless system on the second floor. Public access to high speed Internet is also available at WCC, the Ashe County Public Library, and Family Central.

Cell phone coverage in the county could be improved. Access within some parts of the county is limited. The Town of West Jefferson recently imposed a 6-month moratorium on cell tower construction; however, at their last meeting, they approved a proposal to construct a cell tower within the town limits.

Utilities

Power, water, and wastewater utilities in Ashe County are considered a strength by both residents and businesses. Its local utility providers have kept pace with historical growth in demand, and left the county with ample excess capacity to support almost any medium-sized facility expanding in the county.

Local municipalities have ensured that Ashe County towns are equipped with sufficient capacity. West Jefferson, for example, has spent nearly \$9 million during the past five years to upgrade water and wastewater infrastructure. With a capacity of 400,000 gallons per day, the town is capable of supporting nearly twice its current usage. West Jefferson predicts that its current capacity will support growth for another 10 years before upgrades are needed.

Available Buildings and Sites

Ashe County's 5-acre business park, Beaver Creek, is situated just 1 mile off of Highway 221 in a scenic location. The site is shovel-ready. It is currently equipped with 6" water and wastewater lines, capable of supporting an office use, and a 3-phase voltage distribution electric capacity.

Ashe County also contains several large vacant facilities that could be converted for alternative uses. As mentioned earlier, the 68,000 square-foot Jefferson Apparel is currently for sale. The facility rests on 12.8 acres just off of Highway 16.

The 230,000 square foot Thomasville Furniture facility located in downtown West Jefferson is an excellent example of an innovative use of existing facilities. The facility is planned for redevelopment as a multi-use project containing retail, residential, cultural centers, and business space. This combined with a

streetscape improvement initiative led by HandMade in America, is expected to completely revitalize downtown West Jefferson over the next 10 years. This could drastically change the face of Ashe County and make the entire region more appealing to young professionals.

Both Jefferson and West Jefferson contain a good supply of small retail space. As the Thomasville Furniture facility is converted and more emphasis is placed on creating vibrant downtowns, it is likely that new retail shops and restaurants could fill in existing vacant space.

Factor 4: Quality of Life

Definition

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 Ashe County'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

Entertainment – 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.

Ashe County's Ratings

Crime Rate

On the survey, a low crime rate was listed within the top five most important location factors and county strengths by both Ashe County residents and companies.

Survey participants were accurate in their perception of the county being a safe place to live and conduct business. Ashe County can boast an extremely low crime rate (14.7 crimes per 1,000 people) relative to neighboring Wilkes (27.2) and Watauga (35.2) and larger urban counties such as Forsyth (72.2).

| 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> | High |
| <i>Diversity of housing stock</i> | Moderate |
| <i>Entertainment</i> | Low |

Commute Times

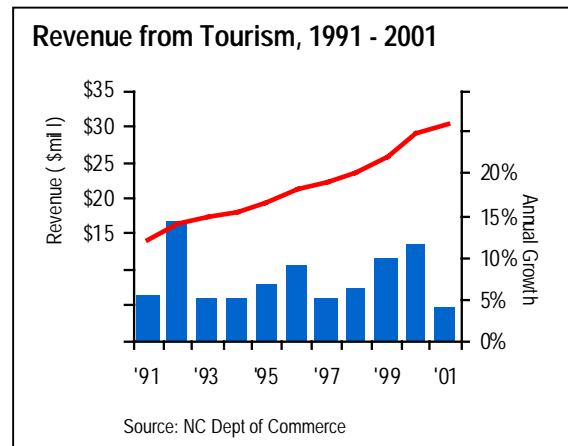
On average, Ashe County residents drive 26 minutes one-way to work. This is slightly longer than its neighboring counties. With 25% of population commuting outside of the county for work, commute times are longer than if more job opportunities were located locally.

Twenty-three percent of people working in Ashe County commute in from another county. This is significantly higher than neighboring counties. Fifteen percent of Alleghany, 12.3% of Watauga, and 20% of Wilkes employees live outside of the counties.

Retail Choice

Many focus group participants considered Winston-Salem as their destination for “big shopping.” One survey respondent pled for more retail options so that she “could buy her clothes someplace other than Walmart.” Ashe County currently lacks retail choice, but the situation is improving.

The recent opening of Walmart is a good sign that retailers are noticing the residential boom in Ashe County. The revitalization of the Thomasville Furniture building as a lifestyle and entertainment complex will supply local retail demand, but also draw in spending from outside of the county. With more retail choice, Ashe County will be able to keep tourists in the county for longer periods of time, increasing even more the county’s tax revenue from tourism. In the future, Ashe could become a regional retail hub.



Health Care

Many survey respondents and focus group participants noted the important need for Ashe County’s health care sector to expand to keep pace with its growing retiree population. Others indicated that local health care lacks specialists, and residents travel outside of the county for everything other than emergency care or family physicians.

This perception is reinforced by examining Ashe County statistics. The county is home to 10.4 physicians per 10,000 people. This is low compared to urban Forsyth County (37.3), and neighbors Alleghany (12.2) and Watauga (21.8). This low percentage of physicians per capita is not, however, reflective of demand for health care. Annual visits to the emergency room per 1,000 Ashe County residents (480) are significantly higher than in surrounding counties. Neighbors Alleghany (436), Watauga (417), and Wilkes (374) are significantly lower, as is Forsyth (399). This could be an effect of Ashe County’s higher percentage of residents 65 years old and older. It also points out an opportunity to increase the number of physicians working within the county.

Transportation issues have made it difficult for residents in rural parts of the county to quickly access medical facilities. The county has worked to provide more convenient 24-hour medical treatment for its residents. Ashe County recently received a three-year grant to establish urgent public care during evenings and weekends at Ashe County Middle School. The grant pays for a registered nurse and

physician's assistant. There are plans for the urgent care center to be connected to the hospital's clinical and business information management systems.

Health care in the county is expected to continue improving. Together with the urgent care services grant, the county is home to 11 volunteer fire departments and two ambulance providers. Ashe Memorial Hospital is currently engaged in renovating its general medical surgical area, pharmacy and clinical laboratory. AMH also has an active program of prevention and wellness in community health with their Mt. Hearts facility. They were recognized as a leader in community health in 2000 when they were one of five hospitals nationally to receive the NOVA award.

Community Image

Both residents and people outside of the county recognize Ashe County as a beautiful location with a pristine natural environment. Many second homeowners and retirees are currently moving into Ashe County to take advantage of this very asset. The county is faced with an opportunity to fine-tune this strength and promote itself as a high quality environment for conducting business as well as living.

Towns in Ashe County contain unique architectural structures and history, but buildings are vacant. The revitalization of Ashe towns and enhancing their tourism-related resources will give a boost to community pride. Greater investment in urban infrastructure, especially supporting the conversion of the Thomasville Furniture facility, will improve the county's entertainment options and make the county more appealing to professionals and businesses alike. Beautiful towns are inviting environments that keep residents living close by and help preserve surrounding natural environments by reducing sprawl.

Some survey respondents noted the possibility that individuals outside of the county have the perception that Ashe County residents are "backwoods" and uneducated. In reality, Ashe County's educational statistics stack up well against several other counties in the region – in both high school graduation rates as well as percentage of the population with some level of college education.

Community image starts at home. Is the appearance of Ashe County one of energy and prosperity or one of struggle? The image of Ashe as a naturally beautiful, mountainous county is well defined. People from across the state and U.S. come to North Carolina to tour the Blue Ridge Parkway and visit the region. It will be important for Ashe County leaders to identify and promote those elements of its image that position it as a place to do business as well as to vacation and retire.

Diversity of Housing Stock

The diversity of homes in Ashe County is improving with the continuing construction trend. At an average price of \$91,600, homes in Ashe County are less expensive than surrounding, more urban areas. Almost 21% of homes in the county are mobile homes (compared to Alleghany County at 14%; Watauga at 10%; and Wilkes at 24%). Slightly less than 50% of homes in Ashe County are owned. Fewer than 15% of Ashe County homeowners pay mortgages that are more than 30% of their income (more than 30% is considered unaffordable). A variety of homes are available: 43.4% of homes in Ashe were built between 1980 and 2000, and 47.4% were built between 1939 and 1979.

Entertainment

For outdoors and sports enthusiasts, Ashe County is a haven. With numerous hiking and biking trails, camping, canoeing along the New River, and golfing, the county offers options for every season. Local residents have commented on the need to enhance this even further – by establishing a YMCA within the county and better developing the infrastructure for winter sports such as skiing.

In addition to outdoor activities, Ashe County has many other attractions, including the Ashe County Cheese Company, the Churches of the Frescoes, and bluegrass music festivals. Within the county, spending on the arts is a priority. Per capita spending on recreation and parks, museums, libraries and arts in Ashe County is \$38 per year – significantly higher than other counties in the region (Wilkes is \$16 per capita; Watauga is \$25; and Alleghany is \$30).

Many entertainment opportunities are still left to be developed, however, including more nightlife activities, restaurants, and cinemas. Currently, the county has very few entertainment options attractive to young professionals. Several Ashe residents requested a YMCA or similar community facility. With additional investment, the Ashe Civic Center could host recreational activities, evening functions, and meetings.

In 2002, Ashe earned \$30 million in tourism-related tax revenue. While Ashe County tourism revenue is increasing every year, Watauga County earned \$147 million and Avery earned \$74 million in 2002. The same natural beauty that is attractive to new residents will also be attractive to tourists. Overnight accommodations, including bed and breakfasts, should be better marketed so that tourists stay longer and spend more in the county. The County has the opportunity to significantly bolster its tourism promotion efforts, perhaps in conjunction with surrounding counties.

Factor 5: Economic Development Efforts

Definition

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.

Ashe County’s Ratings

External Promotion

As mentioned in the introduction section of this report, Ashe County’s economic development efforts are in a fledgling state. With no dedicated economic development director within the county, and very few funds

available for marketing the county, a majority of **external promotion** of the county to expanding and relocating businesses has been the responsibility of AdvantageWest, a regional economic development commission covering a 23-county region, and the North Carolina Department of Commerce.

Gaining name recognition outside of the region and state is the first step to an economic development marketing effort. In many instances, tourism campaigns establish an outside perception of a community long before economic development initiative. In the case of strong tourist regions, economic development efforts should complement the marketing theme already established by tourism. Tourism marketing and economic development go hand-in-hand toward promoting a positive image of a community.

To date, no money other than the limited funds provided to the Chamber for tourism marketing has been spent on externally promoting the county. Since 1991, the Ashe County Chamber of Commerce has received a small portion of the county’s occupancy tax for the purposes of promoting the county for travel and tourism. In ten years, tourism revenue in Ashe County increased from \$10 million to \$30 million. The county has the opportunity build on its tourism promotion efforts (Ashe still lags behind its neighbors that have dedicated more resources to tourism), while developing an economic development theme that reinforces Ashe’s position as a fresh, beautiful location for living and working.

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

In addition to local tourism initiatives, several regional campaigns are also underway. HandMade in America, for example, promotes arts and crafts activities in Western North Carolina and the Blue Ridge Mountains, positioning the region as the center of handmade objects in the U.S. Second, HandMade in America has begun to establish a brand identity for the region that is recognizable across the country. This image should be considered when crafting Ashe County's marketing message.

HandMade in America recognizes the importance of community development within the towns in the region. It has been extremely proactive, for example, in improving the downtown core of West Jefferson, working with local leaders on a Streetscape Plan and creating a work plan for the adaptive re-use of the Thomasville Plan. The organization has been active in providing leadership training, planning recommendations, and recruiting retailers to the area.

Internal Promotion

As one survey respondent stated, "there is a need for improved communication from the local government to the general population." The re-establishment of the Economic Development Industrial Advisory Board (EDIAB) is evidence that county leaders have recognized the need to place more emphasis on economic development and cooperation between organizations. Wilkes Community College, Blue Ridge Electric, the Chamber of Commerce, public officials, and the employment office are all represented on the board.

However, **internal communication** about economic development within Ashe County still has room to improve. With a small population, Ashe County contains a variety of organizations that are related to economic development, yet communicating different messages. In addition to the EDIAB, groups such as the Ashe Chamber of Commerce, Ashe County Revitalization Group, the Business Associations of both West Jefferson and Jefferson, and arts and crafts organizations all represent the interests of local businesses and are, therefore, related to economic development. These organizations are faced with an opportunity to improve communication with one another and establish mutual long-term goals for the future of business within the county.

One challenge cited by Ashe County companies has been a lack of knowledge about what resources are available for local companies, whether for workforce training or small business assistance. A majority of communication between businesses and the public sector has been through WCC or associations such as the Chamber of Commerce. While communication among not-for-profits, educators, and public organizations is improving, internal promotion will only be a strength for the county when local companies are knowledgeable of and actively involved in economic development.

Resource allocation

Funding for economic development is a weakness in Ashe County. No funding is dedicated to economic development at the county level, and the majority of external promotion is handled by AdvantageWest, an organization funded by the State of North Carolina. Staff resource allocation is also a weakness. Only the Town of West Jefferson has a dedicated economic development director – the town manager was recently elected to this position.

APPENDIX ONE: Ashe County Community Input

AngelouEconomics is pleased to present the results of the *Ashe 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. Within the CEDS study area, over 1,400 surveys were submitted, with 181 surveys completed for Ashe County. Of these, 73 responses were from corporations and 108 were from residents.

Summary of the Ashe County Results

Like most counties in the 8-county CEDS study area, Ashe residents and companies place a high value on education, healthcare, and quality of life issues. While residents and companies both acknowledge that the business climate and job situation are important criteria for a good business location, they do not rank these issues in the top 3.

Respondents point to the community college system and family environment as areas of excellence for Ashe County, but expressed low satisfaction rankings for university, economic, and government issues.

| Ashe County Companies' Survey Summary | | |
|--|--|--|
| Top 5 Issues Ranked within Each Category | | |
| Important Criteria for a Business Location | Criteria in which County is Successful | Criteria in which County Needs Improvement |
| 1 <i>Good Healthcare</i> | <i>Strong Family Environment</i> | <i>Access to R&D Resources</i> |
| 2 <i>Family Environment</i> | <i>Low Crime</i> | <i>Strong Economic Growth</i> |
| 3 <i>Low Crime</i> | <i>Climate</i> | <i>Location for High Tech Activities</i> |
| 4 <i>Good K-12 Education</i> | <i>Local Community College</i> | <i>Highway</i> |
| 5 <i>Strong Economic Growth</i> | <i>Arts / Culture</i> | <i>Mobile Phone Service</i> |

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

The following tables show how Ashe respondents rank each factor for “Importance” and “Local Condition” in Ashe (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**

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

Residents

**Rank by
Importance / Local Condition**

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

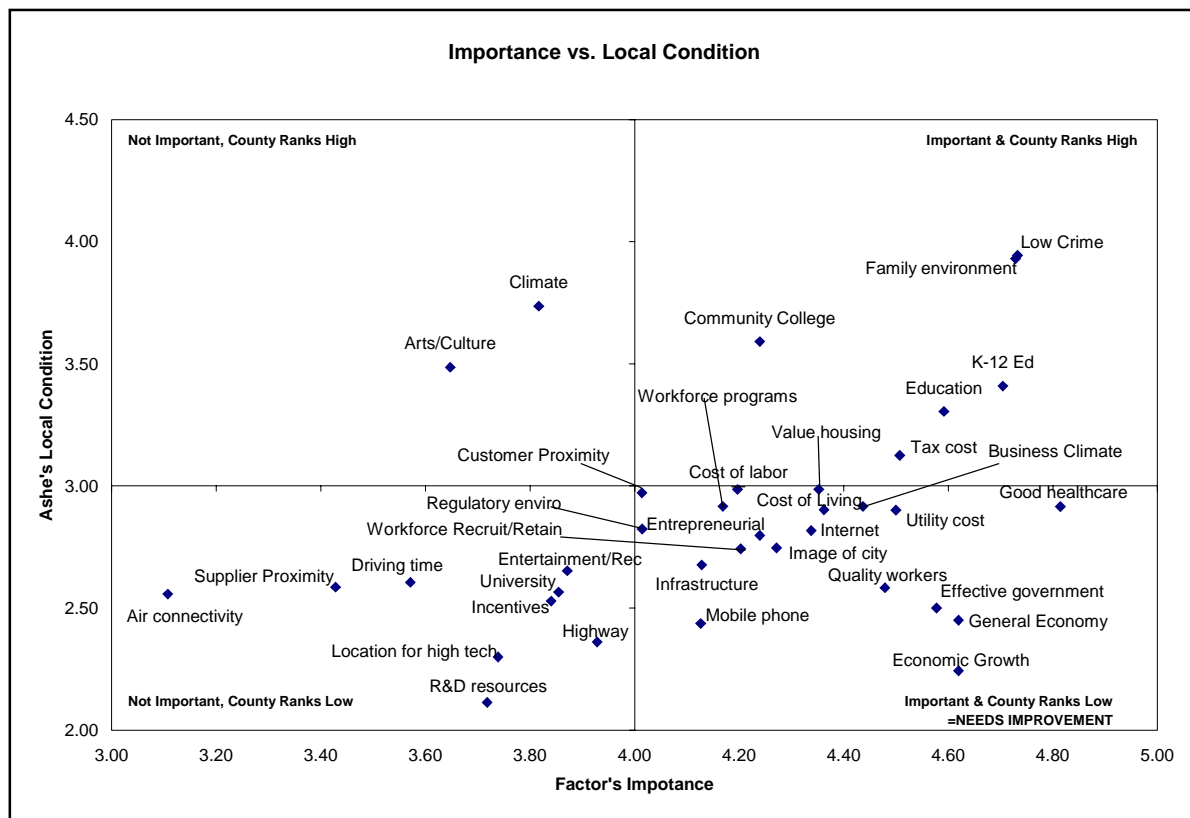
Companies

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 Ashe companies. Factors in the bottom-right quadrant are of above-average "importance" and below-average "local condition", suggesting a need for immediate improvement in Ashe.

Looking at all factors, good healthcare is the most important factor to companies, but companies rank it about average locally. Low crime and family environment are rated high importance and also as the most successful factors in Ashe. The least important factor to Ashe companies is air connectivity. Economic concerns and worker quality are highly important, generally rank low in satisfaction. Overall, companies expressed high levels of satisfaction in two important areas: the community college and family environment in Ashe.



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

- "Road infrastructure plan is in place, but it is taking far too long for the plans to be completed"
- "Local governments get more behind our local community and the arts"
- "Not Wal-Mart Jobs"
- "Better affordable housing"
- "Efforts at developing small business and local agriculture cooperatives"
- "YMCA"
- "Communication from the local government to the general population"

Other comments include:

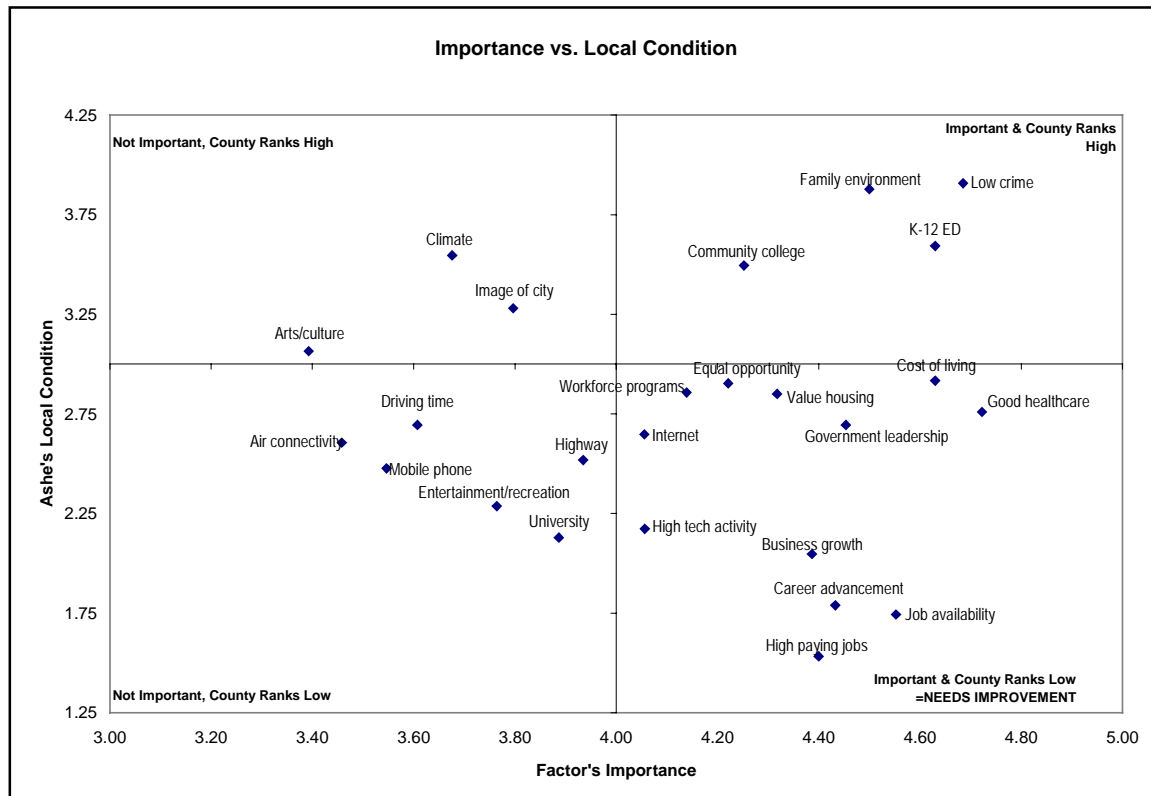
- "Soft business can thrive here"
- "All characteristics favored by tourists and persons building/buying retirement or second homes"

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 good healthcare, and residents rank Ashe slightly higher in satisfaction. Likewise, the most important and successful factors are family environment and low crime. Job-related concerns were the top issues in need of improvement (job availability, business growth, high paying jobs, career advancement). Respondents were generally satisfied with Ashe's physical resources (climate, housing, highway, Internet), but expressed concern over entertainment and cultural amenities (but still valued them less than job issues).



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

- "I would love to see a 4-year University in the county"
- "Enforced laws against pollution, junk cars"
- "More organized activities that attract businesses or bring in money"
- "County wide land use plan"
- "I would like to see the good ol' boy mentality pass out so that we can elect leaders who aren't in office because everyone knows their family"
- "More entertainment and recreation"

Other comments include:

- "Skilled craftsmanship should be capitalized"
- "We have a low cost of living"
- "Wilkes Community College has been very helpful in training people for incoming jobs"

Summary of the 8-County Results

In the 8-county CEDS study area, 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> |

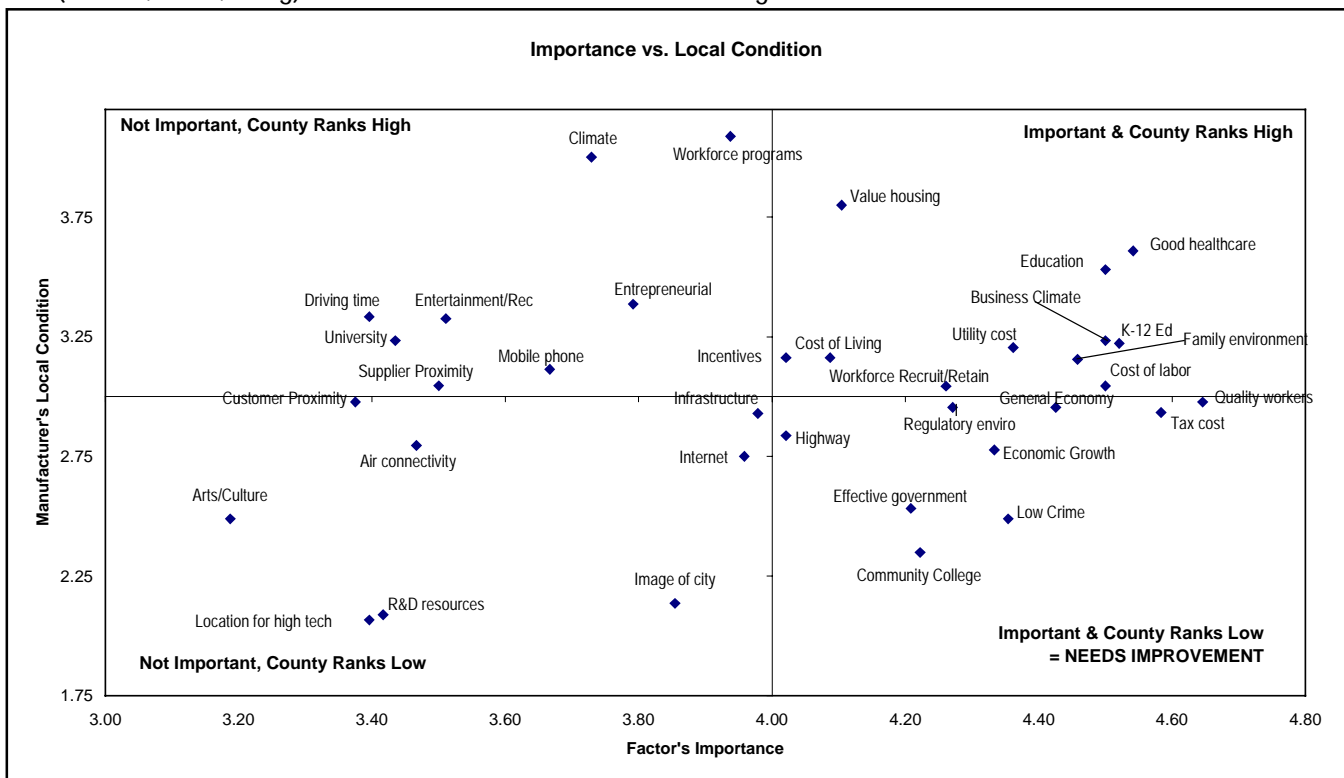
| 8-County Regional Summary: Residents | | |
|---|---|---|
| <i>Top 5 Issues Ranked within Each Category</i> | | |
| Important Criteria for a Place to Live | Criteria in which County is Successful | Criteria in which County Needs Improvement |
| 1 <i>K-12 Education</i> | <i>Family Environment</i> | <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 study area’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 area’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:

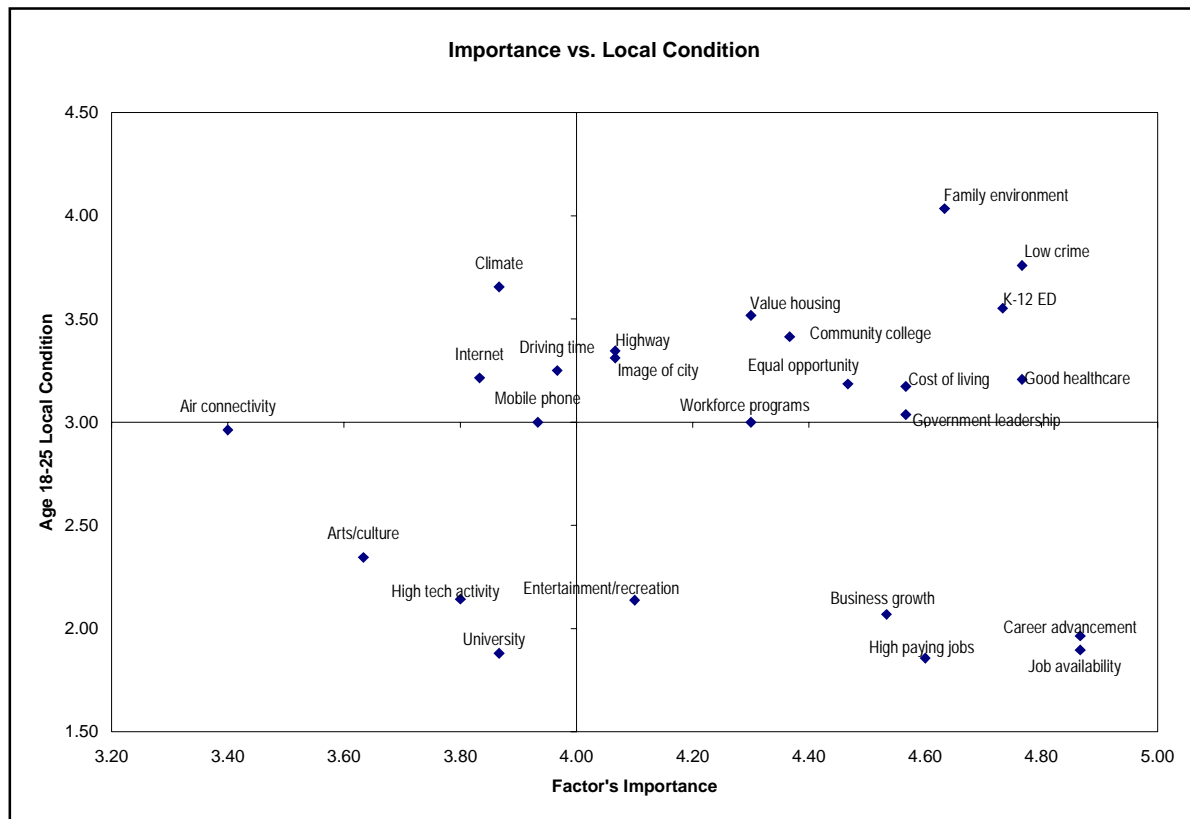
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our county"
- "The hope is that the decisions made today will improve the future for our county and the young people, which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

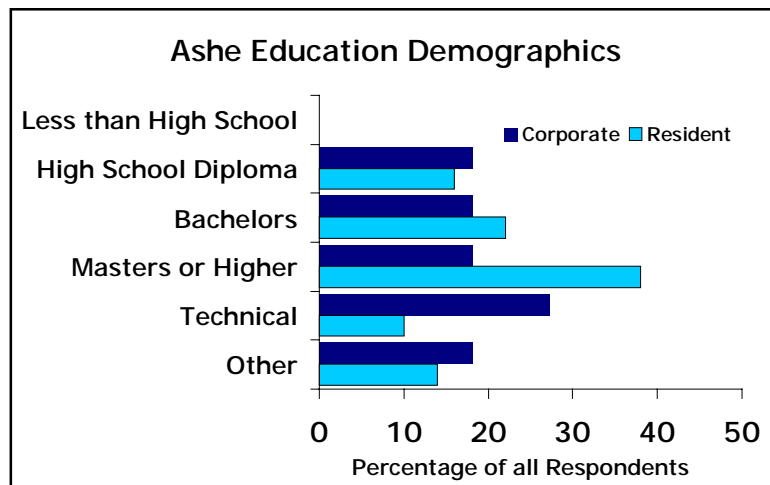
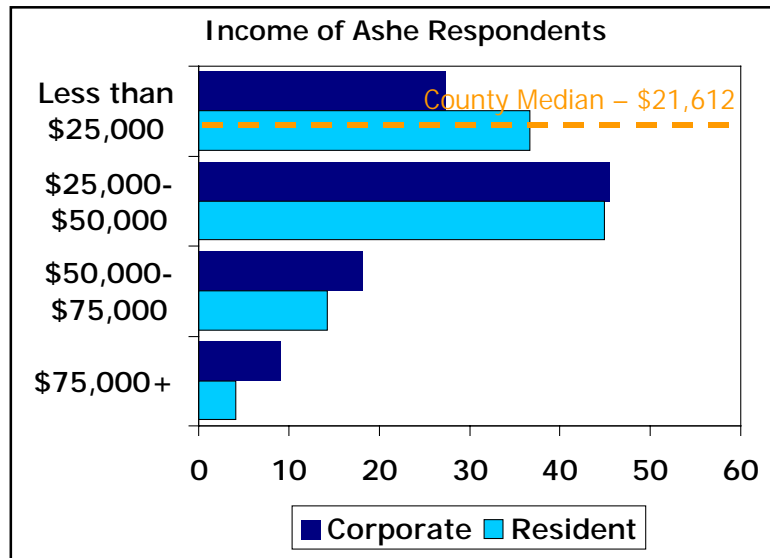
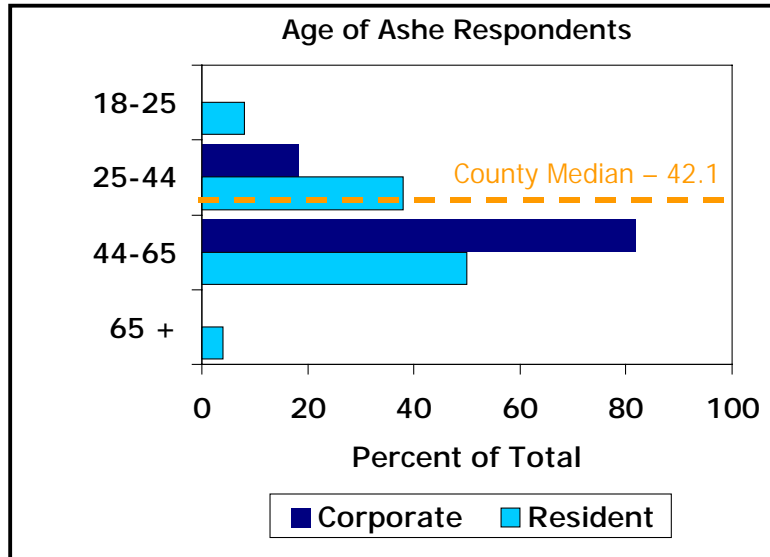
Not surprisingly, the area’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: “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.

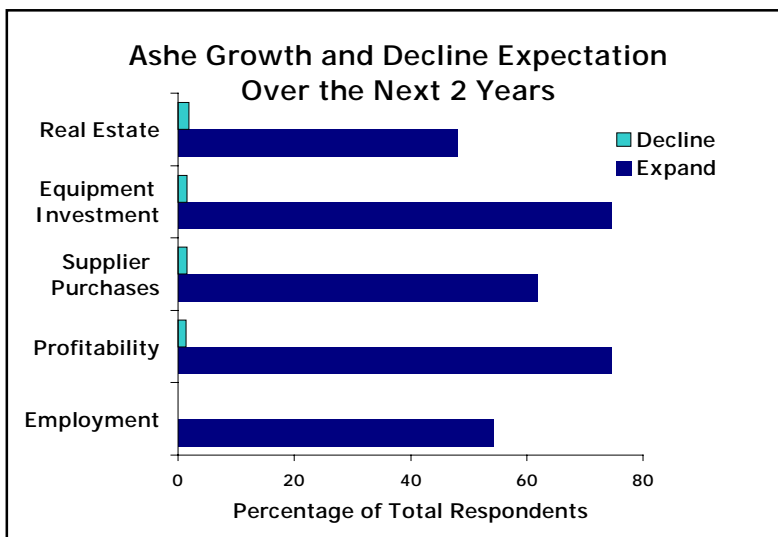
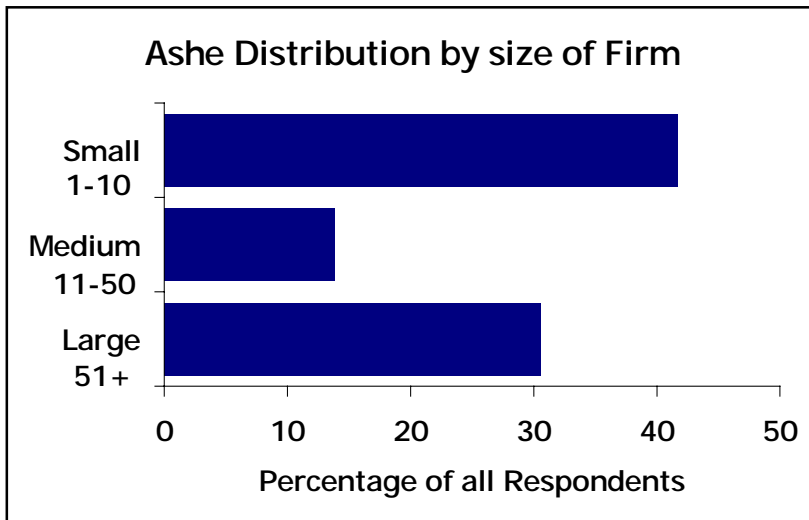
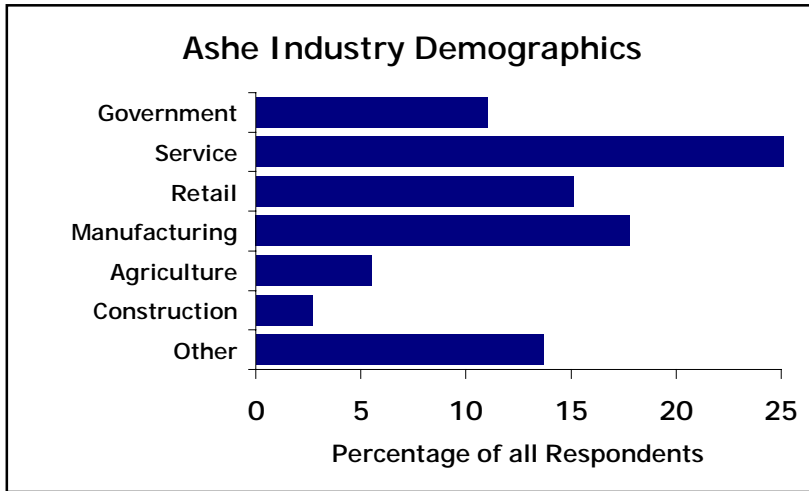


Respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

- “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 Ashe 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 | Beale | 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 | 3.8 / 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

| | ALL 9 | | | | | | | | | | | | | | | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|
| | Alleghany | | Ashe | | Daniels | | 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 | 26.7 / 71.4 | 16.8 / 74 | 26.7 / 71.4 | 16.8 / 74 | 26.7 / 71.4 | 16.8 / 74 | 26.7 / 71.4 | 16.8 / 74 | 26.7 / 71.4 | 16.8 / 74 | 26.7 / 71.4 | 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 | 15.9 / 76.2 | 10.3 / 79.3 | 6.5 / 89.1 | 17.6 / 76.5 | 13.5 / 77.2 | 15.9 / 76.2 | 10.3 / 79.3 | 13.5 / 77.2 | 15.9 / 76.2 | 10.3 / 79.3 | 6.5 / 89.1 | 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 | 30.2 / 33.3 | 27.6 / 31.0 | 26.7 / 37.8 | 36.3 / 32.4 | 29.6 / 36.2 | 30.2 / 33.3 | 27.6 / 31.0 | 29.6 / 36.2 | 30.2 / 33.3 | 27.6 / 31.0 | 26.7 / 37.8 | 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 | 34.4 / 51.6 | 25 / 67.1 | 28.9 / 60.0 | 30.6 / 65.6 | 31.5 / 52.4 | 34.4 / 51.6 | 25 / 67.1 | 31.5 / 52.4 | 34.4 / 51.6 | 25 / 67.1 | 28.9 / 60.0 | 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 | 23.4 / 45.3 | 24.1 / 65.2 | 19.1 / 46.8 | 37.1 / 45.7 | 26.1 / 45.5 | 23.4 / 45.3 | 24.1 / 65.2 | 26.1 / 45.5 | 23.4 / 45.3 | 24.1 / 65.2 | 19.1 / 46.8 | 43.8 / 29.2 |
| Workforce Recruitment / Retention | 46.2 / 30.8 | 23.2 / 65.1 | 22.6 / 35.5 | 33.3 / 45.8 | 26.6 / 53.1 | 24.5 / 48.3 | 31.1 / 46.7 | 25.0 / 50.0 | 26 / 48.6 | 26.6 / 53.1 | 24.5 / 48.3 | 31.1 / 46.7 | 25.0 / 50.0 | 26 / 48.6 | 26.6 / 53.1 | 24.5 / 48.3 | 26 / 48.6 | 26.6 / 53.1 | 24.5 / 48.3 | 31.1 / 46.7 | 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 | 37.5 / 48.4 | 34.5 / 41.4 | 31.1 / 48.9 | 19.4 / 62.8 | 29.9 / 48.2 | 37.5 / 48.4 | 34.5 / 41.4 | 29.9 / 48.2 | 37.5 / 48.4 | 34.5 / 41.4 | 31.1 / 48.9 | 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 | 32.8 / 39.1 | 34.5 / 20.7 | 21.7 / 28.3 | 30.6 / 27.8 | 31.8 / 30.6 | 32.8 / 39.1 | 34.5 / 20.7 | 31.8 / 30.6 | 32.8 / 39.1 | 34.5 / 20.7 | 21.7 / 28.3 | 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 | 28.1 / 28.1 | 37.9 / 17.2 | 14.9 / 25.5 | 19.4 / 30.6 | 26.5 / 25.6 | 28.1 / 28.1 | 37.9 / 17.2 | 26.5 / 25.6 | 28.1 / 28.1 | 37.9 / 17.2 | 14.9 / 25.5 | 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 | 25.0 / 65.6 | 31.0 / 65.2 | 25.5 / 61.7 | 22.2 / 69.4 | 22.9 / 66 | 25.0 / 65.6 | 31.0 / 65.2 | 22.9 / 66 | 25.0 / 65.6 | 31.0 / 65.2 | 25.5 / 61.7 | 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 | 31.2 / 65.6 | 31.0 / 65.5 | 31.9 / 68.1 | 16.7 / 72.2 | 25.4 / 70.5 | 31.2 / 65.6 | 31.0 / 65.5 | 25.4 / 70.5 | 31.2 / 65.6 | 31.0 / 65.5 | 31.9 / 68.1 | 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 | 26.6 / 64.1 | 31.0 / 62.1 | 19.1 / 74.5 | 19.4 / 63.9 | 20.9 / 68.7 | 26.6 / 64.1 | 31.0 / 62.1 | 20.9 / 68.7 | 26.6 / 64.1 | 31.0 / 62.1 | 19.1 / 74.5 | 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 | 26.6 / 26.6 | 31.0 / 20.7 | 21.3 / 40.4 | 38.9 / 27.8 | 32.2 / 29.1 | 26.6 / 26.6 | 31.0 / 20.7 | 32.2 / 29.1 | 26.6 / 26.6 | 31.0 / 20.7 | 21.3 / 40.4 | 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 | 33.3 / 46.0 | 41.4 / 37.9 | 48.9 / 36.2 | 41.2 / 38.2 | 40.3 / 41.2 | 33.3 / 46.0 | 41.4 / 37.9 | 40.3 / 41.2 | 33.3 / 46.0 | 41.4 / 37.9 | 48.9 / 36.2 | 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 | 23.4 / 67.2 | 31.0 / 44.8 | 27.7 / 70.2 | 25.0 / 66.7 | 26.9 / 64.2 | 23.4 / 67.2 | 31.0 / 44.8 | 26.9 / 64.2 | 23.4 / 67.2 | 31.0 / 44.8 | 27.7 / 70.2 | 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 | 25.0 / 57.8 | 31.0 / 41.4 | 22.2 / 57.8 | 27.8 / 47.2 | 25.3 / 54.8 | 25.0 / 57.8 | 31.0 / 41.4 | 27.8 / 47.2 | 25.3 / 54.8 | 25.0 / 57.8 | 22.2 / 57.8 | 25 / 66.7 |
| Regulatory Environment | 30.8 / 38.5 | 24.6 / 43.5 | 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 | 28.1 / 42.2 | 28.6 / 32.1 | 37.0 / 41.3 | 36.1 / 30.6 | 31.5 / 38.3 | 28.1 / 42.2 | 28.6 / 32.1 | 36.1 / 30.6 | 31.5 / 38.3 | 28.1 / 42.2 | 37.0 / 41.3 | 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 | 28.1 / 35.9 | 35.7 / 28.6 | 31.9 / 31.9 | 36.1 / 30.6 | 26.8 / 33.9 | 28.1 / 35.9 | 35.7 / 28.6 | 26.8 / 33.9 | 28.1 / 35.9 | 35.7 / 28.6 | 31.9 / 31.9 | 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 / 31.4 | 27.7 / 38.3 | 28.6 / 31.4 | 25 / 43.3 | 23.8 / 49.2 | 28.6 / 31.4 | 27.7 / 38.3 | 28.6 / 31.4 | 25 / 43.3 | 23.8 / 49.2 | 28.6 / 31.4 | 25 / 43.3 | 23.8 / 49.2 | 28.6 / 31.4 | 27.7 / 38.3 | 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 | 23.8 / 23.8 | 17.9 / 25.0 | 19.1 / 23.4 | 28.6 / 22.9 | 22.1 / 20.8 | 23.8 / 23.8 | 17.9 / 25.0 | 22.1 / 20.8 | 23.8 / 23.8 | 17.9 / 25.0 | 19.1 / 23.4 | 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 | 32.8 / 50.0 | 31.0 / 58.6 | 23.4 / 61.7 | 33.3 / 58.3 | 29.2 / 58.1 | 32.8 / 50.0 | 31.0 / 58.6 | 29.2 / 58.1 | 32.8 / 50.0 | 31.0 / 58.6 | 23.4 / 61.7 | 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 / 43.6 | 33.3 / 41.7 | 32.1 / 42.8 | 29.7 / 43.8 | 24.1 / 41.4 | 32.6 / 43.6 | 33.3 / 41.7 | 32.1 / 42.8 | 29.7 / 43.8 | 24.1 / 41.4 | 32.6 / 43.6 | 33.3 / 41.7 | 32.1 / 42.8 | 29.7 / 43.8 | 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 | 40.3 / 35.5 | 24.1 / 37.9 | 40.4 / 38.3 | 41.7 / 33.3 | 33.4 / 37.9 | 40.3 / 35.5 | 24.1 / 37.9 | 41.7 / 33.3 | 33.4 / 37.9 | 40.3 / 35.5 | 40.4 / 38.3 | 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 | 35.9 / 42.2 | 25.0 / 35.7 | 38.6 / 43.2 | 42.9 / 34.3 | 35.1 / 39.3 | 35.9 / 42.2 | 25.0 / 35.7 | 42.9 / 34.3 | 35.1 / 39.3 | 35.9 / 42.2 | 38.6 / 43.2 | 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 | 20.6 / 23.8 | 7.1 / 10.7 | 20.0 / 22.2 | 31.4 / 14.3 | 20.6 / 17.9 | 20.6 / 23.8 | 7.1 / 10.7 | 20.6 / 17.9 | 20.6 / 23.8 | 7.1 / 10.7 | 20.0 / 22.2 | 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 | 34.4 / 39.1 | 27.6 / 31.0 | 36.2 / 42.6 | 48.6 / 34.3 | 35.5 / 35.1 | 34.4 / 39.1 | 27.6 / 31.0 | 36.2 / 42.6 | 48.6 / 34.3 | 35.5 / 35.1 | 36.2 / 42.6 | 41.7 / 31.2 |
| Driving Time to Business Destinations | 38.5 / 7.7 | 34.3 / 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 | 32.8 / 25.0 | 21.4 / 14.3 | 36.2 / 23.4 | 33.3 / 27.8 | 34.2 / 21.1 | 32.8 / 25.0 | 21.4 / 14.3 | 34.2 / 21.1 | 32.8 / 25.0 | 21.4 / 14.3 | 36.2 / 23.4 | 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 | 40.0 / 20.0 | 32.3 / 46.8 | 31.0 / 31.0 | 29.8 / 38.3 | 50.0 / 25.0 | 35.7 / 36 | 40.0 / 20.0 | 35.7 / 36 | 40.0 / 20.0 | 32.3 / 46.8 | 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 | 21.2 / 55.3 | 44.4 / 44.4 | 29.2 / 50.2 | 40.0 / 48.0 | 21.9 / 54.7 | 24.1 / 48.3 | 21.2 / 55.3 | 44.4 / 44.4 | 29.2 / 50.2 | 40.0 / 48.0 | 44.4 / 44.4 | 29.2 / 50.2 | 40.0 / 48.0 | 21.2 / 55.3 | 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 | 40.0 / 36.0 | 34.9 / 39.7 | 41.4 / 34.5 | 26.2 / 46.8 | 30.6 / 44.4 | 35.5 / 45 | 40.0 / 36.0 | 30.6 / 44.4 | 35.5 / 45 | 40.0 / 36.0 | 26.2 / 46.8 | 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 | 16.7 / 76.0 | 29.7 / 62.5 | 24.1 / 65.2 | 19.1 / 70.2 | 26.7 / 62.9 | 26 / 64.7 | 16.7 / 76.0 | 26.7 / 62.9 | 26 / 64.7 | 16.7 / 76.0 | 29.7 / 62.5 | 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 | 20.0 / 72.0 | 18.8 / 64.1 | 31.0 / 44.8 | 25.5 / 48.9 | 25.0 / 41.7 | 25.2 / 53.2 | 20.0 / 72.0 | 25.0 / 41.7 | 25.2 / 53.2 | 20.0 / 72.0 | 25.5 / 48.9 | 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 | 12.0 / 80.0 | 23.4 / 73.4 | 31.0 / 69.0 | 29.8 / 61.7 | 27.8 / 58.3 | 26.3 / 67 | 31.0 / 69.0 | 27.8 / 58.3 | 26.3 / 67 | 31.0 / 69.0 | 29.8 / 61.7 | 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 | 16.0 / 84.0 | 17.2 / 75.0 | 25.0 / 64.3 | 19.1 / 72.3 | 27.8 / 61.1 | 21 / 69.5 | 16.0 / 84.0 | 27.8 / 61.1 | 21 / 69.5 | 16.0 / 84.0 | 17.2 / 75.0 | 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 | 24.0 / 52.0 | | | | | | | | | | | |

Residents: Rank of Factors
Rank of Average Scores

Importance / Local Condition

| | Alleghany | Ashie | Davie | Forsyth | Rockingham | Stokes | Sunny | Yadkin | 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

| | Allegheny | Ashe | Beale | Forsyth | Rockingham | Stokes | Surry | 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 / 2.6 | 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 | Ashe | David | Forsyth | Rockingham | Stokes | Surry | Youthn | 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 | 32.1 / 67.9 |
| 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 | 21.5 / 78.5 | 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

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