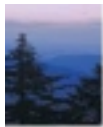


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT Analysis

Davie County

July 2003

SWOT Outline

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Davie County SWOT Analysis

July 2003



AngelouEconomics is pleased to present the Davie 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 region during a 10-month process to identify the area's assets and prepare the region 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, a region 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 *Davie 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.

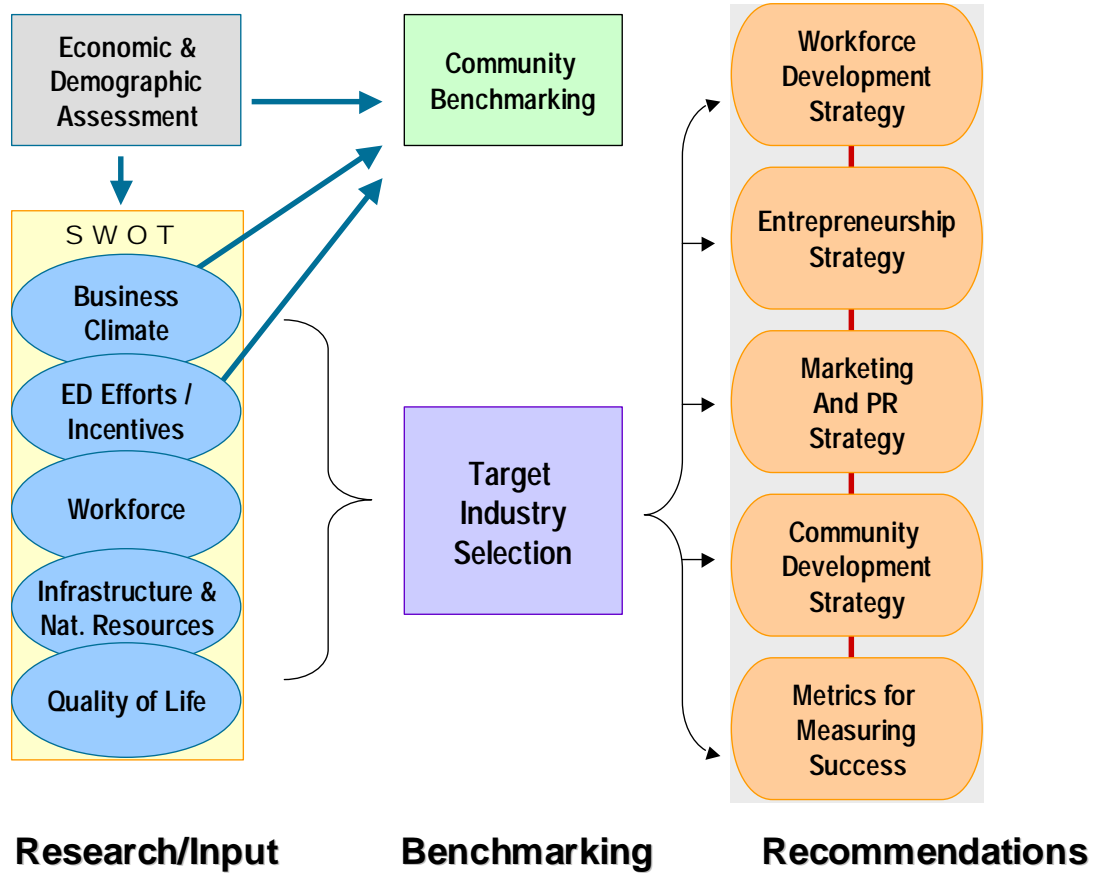
The *SWOT Analysis*, Report Two, takes the investigation of Davie County's economic conditions one step further. First, it incorporates the *perceptions* of the county that the consulting team gathered during its interviews, focus groups, county tours, and on-line survey. It also considers how closely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

The community's perceptions of Davie 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 Davie 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:** The capacity of the 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, 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 sites.
- 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.
- 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 Davie 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 – Davie County's current state does not meet the needs of existing and future businesses and their workers.

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

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

Key Findings

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

While more than 50 people participated in focus groups, the on-line survey provided an opportunity for all residents of Davie County to provide their thoughts on economic development issues. In total, 227 residents and 31 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.

Davie 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>General Economy</i>	<i>Family Environment</i>	<i>R&D Resources</i>
2 <i>Strong Economic Growth</i>	<i>Low Crime</i>	<i>University</i>
3 <i>Education</i>	<i>Good Value Housing</i>	<i>Location for High Tech</i>
4 <i>Good Healthcare</i>	<i>K-12 Education</i>	<i>Entertainment /Recreation</i>
5 <i>Business Climate</i>	<i>Climate</i>	<i>Image of the City as a Place to do Business</i>

Davie 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>Low Crime</i>	<i>Family Environment</i>	<i>University</i>
2 <i>K-12 Education</i>	<i>K-12 Education</i>	<i>High Paying Jobs</i>
3 <i>Family Environment</i>	<i>Low Crime</i>	<i>Job Availability</i>
4 <i>Good Healthcare</i>	<i>Climate</i>	<i>Career Advancemnet Opportunities</i>
5 <i>Cost of Living / Effective Gov. Leadership</i>	<i>Driving Time to Business / Vacation</i>	<i>Location for High Tech Activity</i>

The survey results pinpoint specific areas of strengths and challenges within Davie County. Davie County's identity as a suburban residential area versus business location is a top issue that will drive future economic development, as will the role of western and eastern portions of the county. A countywide land use plan could address these issues that today affect the county's ability to make critical decisions related to infrastructure investment and development.

Davie County's residents and businesses are positive about the county's prospects. Many comments were voiced about the proactive leadership and cooperation between government organizations. Many other statements addressed the county's attractive quality of life. One resident expressed what many other survey participants felt by saying, "Davie County is the best place I have ever lived, and I always recommend living here to anyone that I meet when I travel. The people are very friendly and have smiles on their faces."

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 county, city, and school district

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

Industry growth – The growth rates of major area industries, indicating the health of the local economy

Location – Access to major highways, airports, seaports, and to metropolitan areas

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

Incentive policy – Includes a variety of incentives such as tax abatements, permitting fee waivers, and utility hook-up waivers

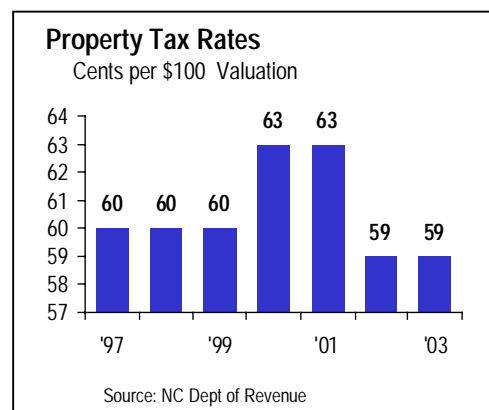
Davie County's Ratings

Tax burden

Davie County enjoys a low property tax burden and has been able to maintain and even lower its county rate over the years (\$0.59). Davie's major cities also have low property tax rates, and the average city/county rate is still lower than most of the surrounding counties. Businesses participating in the survey noted that Davie County's tax rate is a strength. Recent news from the county indicates that tax rates will not increase in 2004.

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

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>	Moderate
<i>Location</i>	High
<i>Entrepreneurial environment</i>	Low
<i>Incentive policy</i>	Moderate



based in capital-intensive manufacturing. Without considering the effect of incentives, Davie County's tax burden should be considered attractive to these types of industries.

Regulatory Climate

Numerous residents taking the survey requested the county enact "more intense plans for architectural guidelines and landscape requirements to create a better sense of community." Suggestions by residents included more zoning to maintain quality of country living and restrictions related to nighttime lighting, noise, water and air quality, and billboard placement.

The county is currently tackling many of the regulatory issues raised in the survey. As a sign of Davie's progressive attitude, it is one of the few rural counties in the state that has countywide zoning in place. County leaders and its two planning boards are considering rezoning so that industrial areas are more clearly defined and business developments occur in specific areas of the county. This will go a long way to addressing the community's concerns about sprawl and preserving the county's natural beauty. Developing a countywide land use plan would be a good next step.

Industry Growth

Industry growth in Davie County is considered a weakness, but the county has not experienced the extreme changes witnessed in other counties in the region. Employment fell 2.1% in 2001, and the unemployment rate is up to 5.1%.

Throughout the 1990s, the county experienced steady employment increases due to expansions by local companies. The availability of jobs in Davie County has been suffering recently, however, and is largely affected by the vitality of a few major employers in the county. Manufacturing still comprises 23% of the county's employment – nearly double that of the U.S. average. One point emphasized during focus groups is the county's goal to diversify both its industrial composition and its demographic makeup. Manufacturing companies will continue to leave the county; therefore, strong economic development activities are needed now to help the county counter job losses that lie ahead.

A portion of the manufacturing jobs lost with downsizing or plant closures has been replaced with jobs in the service, retail, and finance/real estate sectors. Increased employment in all three industries is a direct response to the influx of new residents into Davie. While the service and retail sectors have added hundreds of new jobs in the past 10 years, their average wage levels (\$20,350 and \$16,700 respectively) are below the county's average of \$24,500. With an average wage of \$33,800, the finance and real estate sector is Davie's highest paying.

Davie is in a good location for capturing some of Forsyth County's future growth. It also has an opportunity to grow small businesses in sectors that are lacking – retail, restaurants, hotels, and entertainment venues. With its skilled workers and attractiveness to young, professional families, the county could also capture businesses associated with the medical and design sectors that are expected to be strong in Winston-Salem. The solid foundation of warehousing and plastics-related activities could be built upon. The new Fed-Ex hub could renew distribution activities in the county. As with many counties in the CEDS project region, healthcare and businesses serving an aging population are other possibilities for future growth.

Specific business targets and a detailed description of those targets will be presented to Davie County during the next step of this project.

Location

Davie County's location is a strength, particularly for residents and businesses located in the eastern portion of the county. Davie's proximity to Greensboro is also ideal for travelers – residents are a quick drive away from an international airport. The driving distance to Greensboro and Winston-Salem is minimal, making it easy for some residents to access shopping and dining amenities, and for businesses to be connected to customers and suppliers. Because of its location, some parts of Davie County have emerged as suburban neighborhoods for individuals working in Winston-Salem.

While the county's proximity to Winston-Salem is a strength for business location, it is a challenge for retail and entertainment. One survey respondent estimated that she "drives to Winston for 90% of [her] shopping, entertainment, and dining." If Davie's population and spending power increases in the future, the county should expect to see additional retail and restaurant investment.

Entrepreneurial Climate

During focus groups, all participants agreed that the county should begin targeting small to medium-sized businesses. Strong entrepreneurial climates typically contain excellent telecommunications infrastructure, access to capital, a young workforce, and close proximity to colleges, universities, and research and development activities. Davie County has many characteristics that could be attractive to entrepreneurs. The county already has elements in place to nurture start up companies. With three of the top banks in the region calling Davie home, for example, funding is nearby. The Mocksville Chamber of Commerce works closely with the state small business development center to provide free counseling to entrepreneurs. Seventy-seven percent of Davie businesses employ fewer than 10 people.

Home-grown businesses could be the future for Davie County business growth and revitalization, particularly in more rural parts of the county. With its proximity to Winston-Salem and Davidson Community College campus, Davie has access to tremendous training, university, and research and development resources. Combined with the young professional influx in Winston-Salem, Davie is among the younger counties in the 8-county CEDS area. Several individuals surveyed recommended that the best way for the county to revitalize its cities is to provide "incentives to smaller businesses to locate in the downtowns of Mocksville, Cooleemee, and Hillsdale."

Davie faces one challenge within its entrepreneurial climate. Residents lack knowledge about how to start a business or that entrepreneurship is a career option. Many of the industries that are desperately needed in Davie County (retail, restaurants, and lodging) could be launched by residents if they had access to entrepreneurship education resources. One business person surveyed requested that the county further its "culture of openness and inclusion for new businesses and entrepreneurs," including an effort to "create awareness of and support for local businesses." To encourage this type of business climate, the Mocksville Chamber's entrepreneurship counseling could be built upon or the program adopted by other communities in the county.

Incentives

Traditionally, Davie County has not relied heavily on incentives to promote business expansion. Local utility companies, such as Duke Power, have adopted policies that allow them to provide inducements to expanding or relocating facilities. Many survey respondents emphasized their desire for the county to offer greater incentives for businesses relocating to Davie County and to smaller local companies.

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

Most competitive incentives in the southeastern U.S. are cash- or grant-based, of which little is available in North Carolina at the state or local level. Although the State of North Carolina does not allow counties to give economic incentives in the form of property tax abatements, certain measures can be taken by the county to enhance its attractiveness to relocating companies. Counties may, 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 Davie 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, community colleges, and technical training programs. Greater community access to higher education facilities provides more opportunities for workforce skill improvement, customized training programs for local companies, and 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 from which the community can draw to support employers' workforce needs. 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.

Davie County's Ratings

K-12 Education

Davie County residents and businesses are in agreement on the high quality of local schools. The statistics validate this perception. The high school drop out rate in Davie (5.9%) is lower than that of any of the neighboring counties of Forsyth (6.7%), Rowan (6.9%) and Davidson (6.1%). The U.S. average is 11.2%.

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

SAT scores, another indicator of performance, are much higher in Davie than surrounding counties. Davie (average SAT score of 1027) is higher than Forsyth (1000), Rowan (976), and Davidson (977). The county is also higher than the state average of 998 and the U.S. average of 1020. North Carolina ranks 13th in the U.S. for highest percentage of students taking the SAT.

On the survey, both residents and local companies ranked education among their top five most important location factors. Several school facilities in the county are in need of expansions or renovations. To maintain the county's stature as having a high quality K-12 educational system, it will be important to continue investing in the quality of the school buildings. School bond elections, for example, are a factor examined by site selectors and an issue that affects everyone within a community, with or without school age children. For potential investors, communities that do not vote 'yes' for school bonds make an impression that they do not value education. It will be important for Davie County residents to pass the upcoming November \$8.8 million school bond election to upgrade facilities and technology within local schools.

Higher Education and Workforce Training

Davie County is fortunate to have a satellite campus of Davidson Community College (DCC) located in Mocksville. The college has several programs that tie in well with Davie's potential target industries, including nursing programs and plastics training. The college also serves as the county's primary workforce training provider; offering customized training courses for employers.

DCC's course offerings could be increased to meet growing demands of Davie residents. Its popular e-commerce and technology training programs are in high demand, but locals complain that not all courses required for certification can be completed on the 2-building Davie County campus. Local employers also voiced a desire to see DCC offer more vocational training and increased connection with local high schools. In future years, the county has an opportunity to encourage DCC to add additional buildings to its current site and fill the needs of the county's rising population.

Labor Pool

Survey respondents and focus group participants all describe Davie County's workforce as being hardworking, ethical, and proud. Many Davie residents' families have lived in the county for generations, increasing their commitment to stay in the county long-term. For companies, Davie County's workforce is affordable relative to Forsyth, but not as low cost as employees in the more rural counties in the CEDS region. Davie County's per capita income in 2000 was \$21,350 while Forsyth's was \$23,000. The region as a whole is still much less expensive than the Charlotte and Raleigh-Durham areas, where per capita incomes are around \$27,000 annually.

The county contains a diverse workforce, containing skilled craftsmen to business people. Residents in neighborhoods bordering Forsyth County, particularly in Bermuda Run, are well-educated high-income professionals and retirees, many with financial and health care experience. Davie is also becoming a preferred location for artists who want to leave the big city environment but stay active in the arts community (locally, in Winston-Salem, and across the state.) Professionals in technical fields, such as engineers, are among the most difficult for Davie employers to find locally.

The county average unemployment rate for 2002 was 5.1%, below the both the national average of 5.8% and state average of 6.7%. The relatively low rate is reflective of the suburban nature of the community, particularly in the southern portion of the county where many residents have a large area in which to search for work. Additionally, 30% of workforce is considered "professional," a group less apt to lose their jobs in this recent economic downturn.

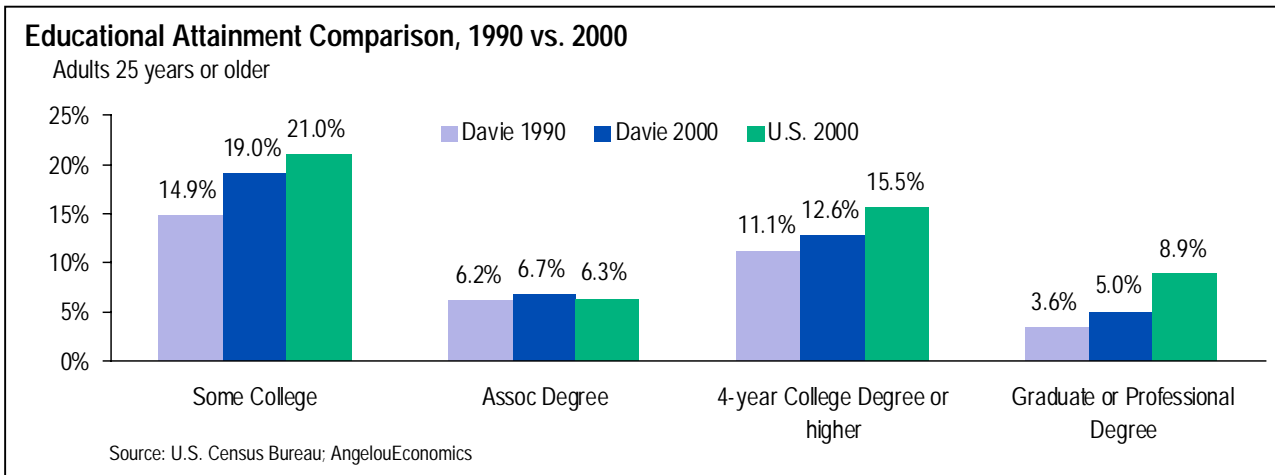
The region as a whole has been growing older; in Davie this is due to both a loss of younger people and an influx of older people. The 1990 Census reported that 33 percent of county residents were between the ages of 25 and 44. This percentage is comparable to many young high tech centers of the nation. By 2000, this percentage had fallen to 29.

These figures show two things. First, it shows the ability to attract young people into the area. Secondly, while regional economic issues largely influence the trend, it shows the challenge in retaining them. Often, strategies for holding onto this demographic are as simple as promoting the development of central gathering places such as restaurants, coffee shops, and adult sports programs. Connecting young adults with each other will also connect them with the larger community, leading to stronger ties to the county.

Educational Attainment Levels

Though improving, the percentage of Davie County population with a college degree or higher is still less than the U.S. average. The county is stronger in its percentage of residents with some college education (19% compared to 21% U.S. average). This population segment has dramatically increased since 1990 – likely due to educated individuals moving into new upscale neighborhoods. DCC will continue to play a significant role in helping the county reach (and exceed) the U.S. average educational attainment.

These numbers do not illustrate the percentage of residents without a high school degree. At 22%, Davie County has a lower portion of non-graduates than Davidson (28%), Rowan (26%), and Yadkin (28%). While Davie compares well locally, the entire region does not fare well when compared against the U.S. – 17% of the adult population nationwide does not have a high school degree.



Factor 3: Infrastructure and Land Use

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

Land – The costs and availability of commercial and industrial land

Transportation infrastructure – City 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.

Davie County's Ratings

Land, Buildings, and Sites

Davie County has an abundance of available sites and buildings. The county contains five sites zoned for industrial use: Swicegood in Mocksville (75 acres / \$20,000 per acre); the Wachovia site just outside of Mocksville (95 acres / \$15,000 per acre); Meroney in Mocksville (125 acres / \$20,000 per acre); the Moose site near Cooleemee (147 acres / \$6,500 per acre); and the Foltz Enterprises site in Mocksville (244 total acres / \$8,179 per acre). The county also contains almost 700,000 square feet of industrial and office space available for lease or purchase.

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

Local businesses expressed a need for smaller office space (less than 10,000 square feet) to be made available. This would complement an economic development effort aimed at entrepreneurship. Several individuals also described their wish for the county to develop a large meeting space. This would tie into the county's position as a tourism destination – providing an opportunity to increase the number of business retreats and conferences coming to the county.

Transportation Access

Davie is in an ideal location for businesses. It is within a three-hour drive of every metropolitan area in North Carolina. It is situated near three major interstates: I-40 (which bisects the county), I-85, and I-77. The EDC estimates that one-half of the nation's population and one trillion dollars in industrial production,

representing 60% of the U.S. market, is located within 800 miles of Davie County. This strength could be promoted to any business that requires the distribution of goods, either by air or by road, and any business that supplies Piedmont-Triad's major employers.

Survey respondents mentioned several possible roadway improvements. Among top issues mentioned is the need for exit ramps at I-40 and for work on the bypass of Highway 64 around Mocksville to be expedited. The County is currently working with the NCDOT to create turn lanes at the Highway 158 and 801 intersection, a move that is expected to relieve some of the traffic congestion currently experienced in eastern parts of the county.

Telecommunications

Telecommunications service, particularly in rural areas, is essential to business growth and entrepreneurship. Within Davie County, there is an overall need for improved access to affordable high speed Internet connection. Parts of the county experience "very poor" cell phone coverage. Residents with good telecommunications service complain of the high cost. As a survey respondent mentions, "Davie County needs more choice in phone and cable service providers."

The telecommunications situation in Davie is improving, however. Rural access is increasing. New service providers are expanding in the county, providing locals with more choice and lower costs. A single fiber optic network connects all Davie County schools and government offices. Many see the high Davie student rankings in computing conferences as a direct result of this network.

Yadkin Valley Telecommunications is beginning to provide DSL service to more rural parts of the county. Sprint offers DSL in Mocksville. Adelphia is currently the county's primary telephone provider.

Utilities

Davie County is served by three water plants supplying eight million gallons per day of total capacity (two million excess). Eastern Davie County is the only area suffering from a shortage of sewage capacity as the existing system is unable to keep pace with heightened demand from residential growth in the area. There is a sense that the water shortage in that part of the county has prohibited new retail, entertainment, and single / multifamily residential development. County leaders are facing tough decisions related to financing and placement of a new sewage treatment plant. A countywide land use plan could help identify the appropriate location of the facility.

Despite budget cuts, Davie County's proposed budget for next year includes funding to increase water capacity and upgrade the Cooleemee Sewer Plant without raising water and sewer rates.

Local businesses have stated that Duke Power's service and low cost electric service is an important strength.

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 Davie 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 driving 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.

Davie County's Ratings

Safety

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

Survey participants were accurate in their perception of the county being a safe place to live and conduct business. Davie County can boast a crime rate lower than any of its neighboring counties (20.7 crimes per 1,000 people) relative to Iredell (39.5), Davidson (28.5), and larger Forsyth County (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>	Moderate
<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, Davie County residents drive 24 minutes one-way to work. This is typical of the suburban communities surrounding Winston-Salem. With a whopping 53% of Davie residents commuting outside of county for work, commute times are longer than they would be if more job opportunities were located locally.

People	1990	2000
Working in Davie	10,610	10,692
Live & work in Davie	8,214	7,710
Live elsewhere & work in Davie	2,396	2,982
% workforce commuting in	23%	28%
Live in Davie & work elsewhere	6,265	8,924
% resident workers commuting out	43%	54%

Source: US Census Bureau

Retail Choice

With its close proximity to Winston-Salem and Greensboro, a number of Davie residents living in the eastern part of the county have commented on their appreciation of the convenience to a wide variety of retail. Within Davie County itself, however, retail choice could be expanded. "Those of us in the bottom of the county," stated one survey respondent, "do not have much shopping and commercial choice as people living closer to Winston-Salem." Another participant stated that Davie needs "some clothing and shoe stores other than Walmart."

As mentioned in the *Davie County Community Assessment*, after growing for five continuous years, retail sales in Davie County fell 12% in 2002. This decline is not indicative of long-term retail growth in Davie County. Retail sales are volatile and closely tied to economic conditions. As more people move to Davie County, it is likely that new stores will spring up as well.

Health Care

Davie County's hospital has been through dramatic changes in recent years. One year ago, it reopened and made available 24-hour emergency care. Local residents understand that their location has always allowed them to access to first-rate hospitals in Winston-Salem. With the exception of a multiple sclerosis clinic, specialty services are not available in Davie.

Examining Davie County statistics reinforces this perception of being underserved by medical care. The county is home to 6.6 physicians per 10,000 people. This is low compared to urban Forsyth County (37.3) and Rowan (12.1). This low percentage of physicians per capita may be connected to the degree Davie County residents utilize services in Forsyth County. It also points out an opportunity to increase the number of physicians and health care facilities within the county.

Community Image

During focus groups and in reviewing the survey responses, a variety of comments were made regarding the image of the county. Many people expressed a desire for Davie to become more of a business destination rather than a departing point for commuters. This is reflected in the unanimous desire for new jobs to be created in the county.

Community image starts at home. Is the appearance of Davie County one of energy and prosperity or one of struggle? The image of Davie as a naturally beautiful and historic county is well defined. The county is faced with an opportunity to build upon this image by encouraging more business investment in its downtowns. Davie cities contain beautiful architecture and history, but buildings are vacant. Beautiful

cities are inviting atmospheres that keep residents living close by and reduce sprawl. The continued revitalization of Davie downtowns combined with an effort to enhance the tourism-related resources across the county will boost community pride even higher. Greater investment in urban infrastructure will improve entertainment options and make Davie more appealing to businesses and residents. Strong ordinances controlling signage and development within natural areas will help preserve the image of the county long-term.

Diversity of Housing Stock

Many residents participating in the survey commented on the lack of multifamily housing and availability of quality homes for first-time homebuyers and seniors. Without a diversity of housing stock, Davie could experience difficulty recruiting young professionals to fuel future business growth. Two 700+ house subdivisions are currently planned for Davie County. These new homes could expand the diversity of the county's housing stock.

Twenty-four percent of homes in Davie County are mobile homes, a much higher concentration than in neighboring Davidson (18%) and Iredell (18%). Yadkin is the only neighboring county with a higher percentage (30%). Slightly more than one-half of Davie residents own their own home

Entertainment

A large portion of survey respondents requested improvement in local entertainment for all ages, from teenagers to seniors. Common requests included a movie theater, bowling alley, and new family-friendly restaurants. To get a sense of how important this aspect of a community is, the average American spends 43 percent of his/her food budget in restaurants, eating out an average of 4.2 times per week. A lack of nighttime entertainment was also mentioned.

The county contains good infrastructure for outdoor recreation and youth sports, including the Brock Recreation Center and the YMCA. Residents recommended that the county consider developing more trails and greenways that connect the county for cyclists and hikers. Golfing and canoeing are other outdoor options.

Entertainment options are plentiful within a short driving distance of the county. The county is within a two-hour drive of the mountains and a four-hour drive of the ocean. Locals frequently take day-trips into Charlotte and other Piedmont Triad cities. The many wineries in the region provide tourists and local residents an entertainment option not found in many other communities.

Per capita spending on recreation and parks, museums, libraries and arts in Davie County is \$22 per year – on par with neighboring counties (Davidson is \$22 per capita; Iredell is \$24; and Yadkin is \$15) but significantly lower than Forsyth (\$49 per capita). Cooleemee is currently putting the finishing touches on a museum at the Textile Heritage Center; by the end of 2003, the city will have two museums and a nature park on the banks of the Yadkin River. The Uptown arts and crafts festivals, Brock Point Performing Arts Center, vintage automobile show, and summer cruise-ins are other unique entertainment options found only in Davie.

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.

Davie County's Ratings

External Promotion

While Davie County has an excellent team of economic developers and Economic Development Council, a majority of business prospects approaching the county have been generated through contacts at the Piedmont Triad Partnership.

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>	Moderate

Internal Promotion

Davie County leaders, municipalities, chambers of commerce, and local employers share a cooperative relationship. The level of participation in focus groups by Davie County businesses was greater than almost any other county in the CEDS project region. The county, cities, and companies recognize the importance of economic development and are willing to work together to enhance job creation. When asked why they chose Davie County, several businesses said it was because of the sense of welcome they received from the county's public sector leadership.

Does this mean that the entire county is in agreement over economic development? The county still contains a faction of individuals who are concerned about business growth. Greater internal communication explaining that the county supports a balance between business growth and preservation of Davie's natural beauty could relieve any tension over economic development. Land use planning could better define the roles of the eastern and western portions of the county. Several local businesses requested that the county boost the internal marketing effort by creating “more avenues to communicate interests and ideas,” including a series of “open forums at which the public can help Davie County plan the

direction of its future.” The survey and focus groups conducting as a part of this CEDS process are a good starting point for opening up the lines of communication even further within Davie County.

Resource allocation

As with all counties in North Carolina, the State government's freeze of funds to help balance the state budget has hurt Davie County. In fiscal year 2001-2002, the State froze \$900,000 in Davie County revenue; in 2002-2003, the budget freeze was expected to reach \$2.3 million. This has had a serious impact on the ability of the county to invest in economic development and infrastructure improvements that could make the county better suited for business growth. In 2002-2003, the Davie County EDC agreed to a \$20,000 cut in its already lean budget. The State is expected to allow counties to keep their ½ cent sales tax collections no earlier than the 2004-2005 fiscal year.

Although economic development funding is restricted both at the county and city levels, human capital remains strong. The county's 12-person EDC Board of Directors, Chairman, and representatives from Davie cities and Chambers of Commerce are the county's best resources.

APPENDIX ONE: Davie County Community Input

AngelouEconomics is pleased to present the results of the *Davie County Survey*, conducted from December 2002 to May 2003 as part of the Northwest North Carolina Comprehensive Economic Development Strategy (CEDS). AngelouEconomics elected to survey residents and companies independently in order to gain both perspectives on the local economy. Region-wide, over 1,400 surveys were submitted, with 258 surveys completed for Davie County. Of these, 31 responses were from corporations and 227 were from residents.

Summary of the Davie County Results

Like most counties in the 8-county CEDS region, Davie residents place a high value on education, healthcare, and low crime, but companies are more concerned today with economic issues. Both residents and companies are pleased with the performance of K-12 schools and also rate quality of life factors very highly: family environment, low crime, climate.

Both companies and residents expressed concern over the “University” factor, suggesting a lack of university programs or coordination with the county. Somewhat surprisingly, both also expressed a desire to make the area more of a region for high tech, and businesses would like to see improvements in the county’s image as a place to do business and more access to research and development resources. Companies are also concerned about entertainment options, presumably for their workers, but residents are more concerned with job availability and the presence of high-paying jobs and career advancement opportunities. All respondents expressed high satisfaction with the county’s cost of living and housing.

Davie 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>General Economy</i>	<i>Family Environment</i>	<i>R&D Resources</i>
2 <i>Strong Economic Growth</i>	<i>Low Crime</i>	<i>University</i>
3 <i>Education</i>	<i>Good Value Housing</i>	<i>Location for High Tech</i>
4 <i>Good Healthcare</i>	<i>K-12 Education</i>	<i>Entertainment /Recreation</i>
5 <i>Business Climate</i>	<i>Climate</i>	<i>Image of the City as a Place to do Business</i>

Davie 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>Low Crime</i>	<i>Family Environment</i>	<i>University</i>
2 <i>K-12 Education</i>	<i>K-12 Education</i>	<i>High Paying Jobs</i>
3 <i>Family Environment</i>	<i>Low Crime</i>	<i>Job Availability</i>
4 <i>Good Healthcare</i>	<i>Climate</i>	<i>Career Advancemnet Opportunities</i>
5 <i>Cost of Living / Effective Gov. Leadership</i>	<i>Driving Time to Business / Vacation</i>	<i>Location for High Tech Activity</i>

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

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

Residents

Rank by Importance / Local Condition

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

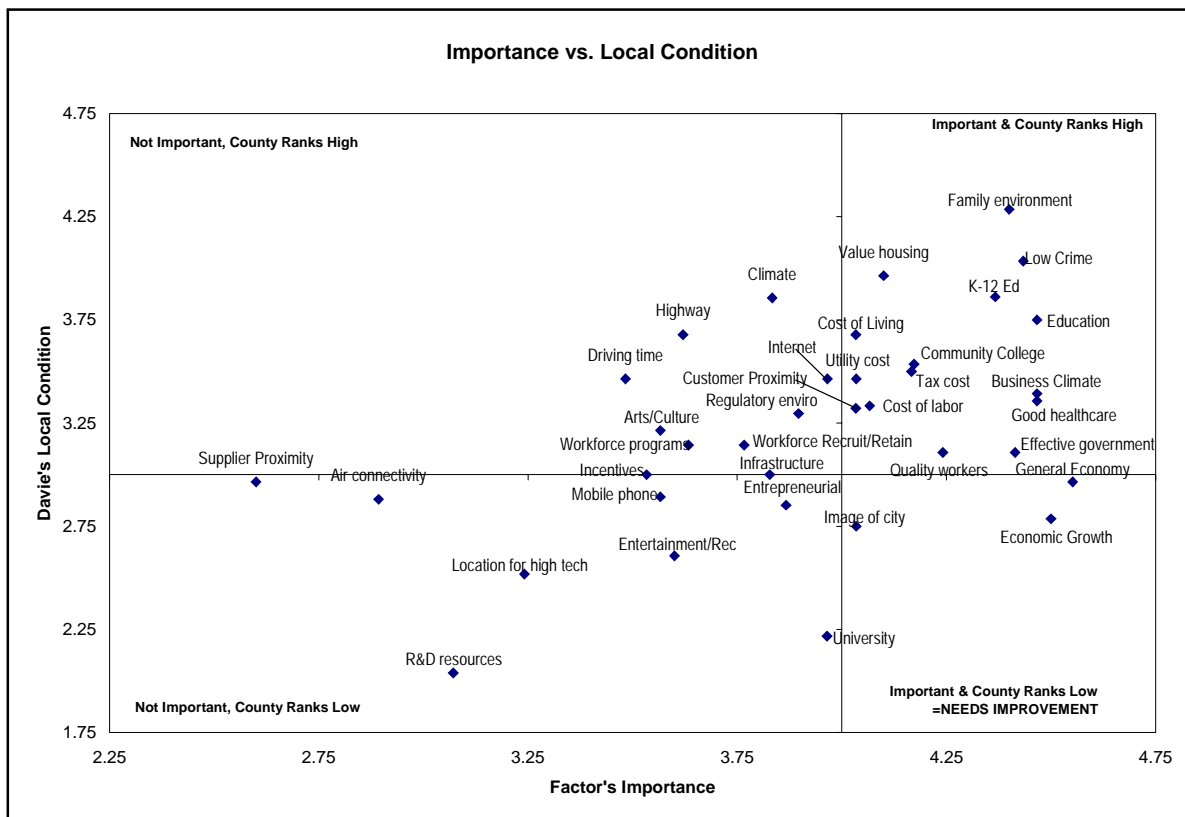
Companies

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

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

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

Many quality of life factors rate both important to companies and performing well locally: family environment, low crime, education, and housing value. Companies ranked healthcare as one of their top issues of importance, but only rated healthcare in the county slightly above average. Effective government leadership is also highly important, but is rated just below average. The community college was rated well, but labor-related factors (cost, quality, recruitment, training) all rated average. Companies would like more from their university and other R&D resources, and generally rate the entrepreneurial environment and high tech assets as average or below average. More entertainment options are desired, and companies rate the county’s arts and culture slightly about average. Overall, companies are pleased with the quality of the county, and mostly desire improvements in the general economy and image of the city as a



place to do business.

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

- "County wide sewer availability"
- "More avenues to communicate interests and ideas"
- "Improve infrastructure and cooperation with firms investing in county"

Other comments include:

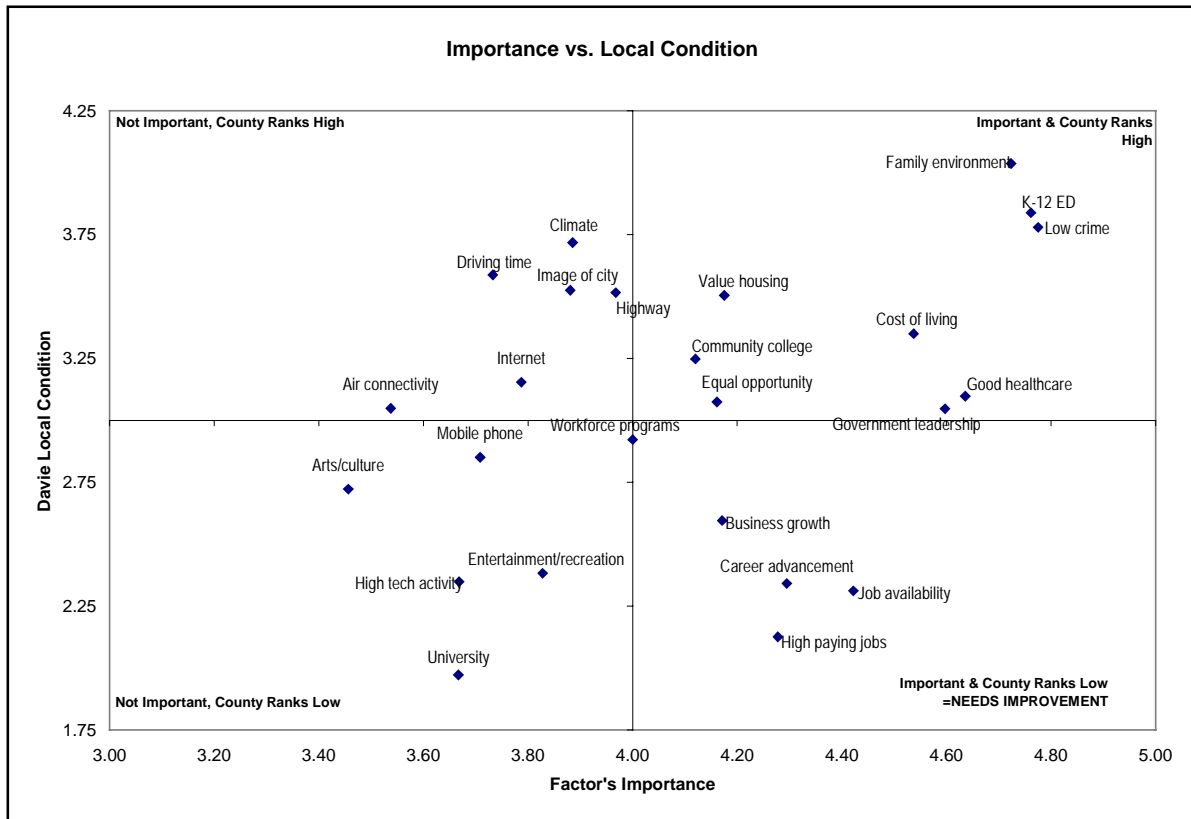
- "Davie county is a great place to live, work and raise a family"
- "Make sure County Manager Terry Bralley stays here and continues his very positive economic development efforts"
- "Our past dependence on manufacturing has hurt us economically"

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 factors for residents related to education and quality of life. The county’s family environment received the highest rating of all factors. Good healthcare is a modest concern, as is effective government leadership, but most residents are preoccupied with job-related issues (career advancement, higher pay, and job availability). Residents expressed a desire for more entertainment options, but are very pleased with the city’s image as a place to live. Cost of living and housing rated highly, and drive times are viewed very positively. Residents do not perceive Davie County to be a place for high tech, but rate this low in their priorities of importance. Residents are generally pleased with their Internet access, but would like to see better mobile phone service. The community college is rated well, but residents rated workforce programs as just below average. Overall, Davie residents rate the community highly.



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

- "Unified development ordinances"
- "Improvements of some of the road systems"
- "More condominiums for the elderly and the first time home owners"
- "The county must make some bold moves with regard to transportation"
- "More restaurants besides fast food"
- "Improved physical buildings for schools"

Other comments include:

- "Davie County is the best place that I have ever lived and I always recommended living here to anyone that I meet while I travel."
- "Support smaller 'ma & pa' companies"
- "Work needs to be done with the local community college to ensure that courses leading the certification can be done locally."

Summary of the 8-County Regional Results

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

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

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

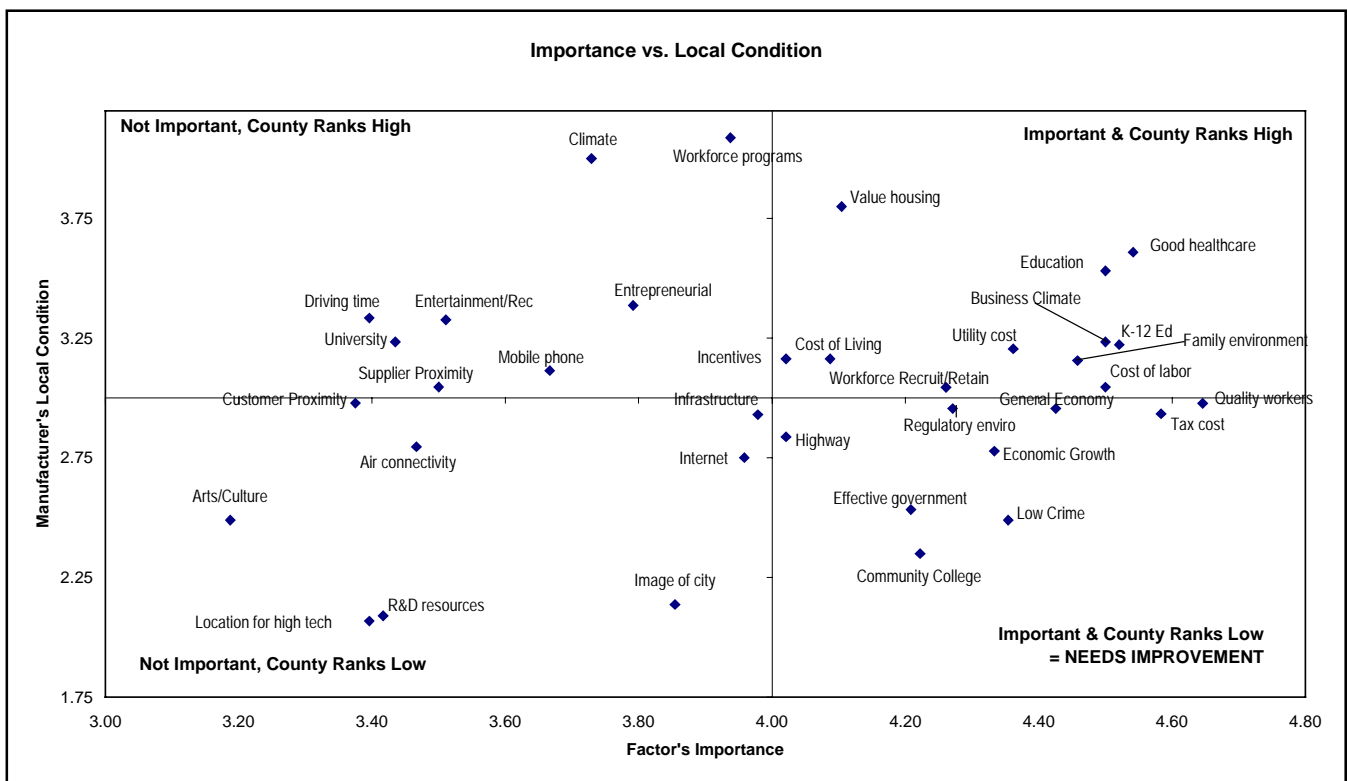
8-County Regional Summary: Residents <i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>University</i>
2 <i>Low Crime</i>	<i>Local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

Manufacturers (Region-wide)

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

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

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



of taxes below-average.

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

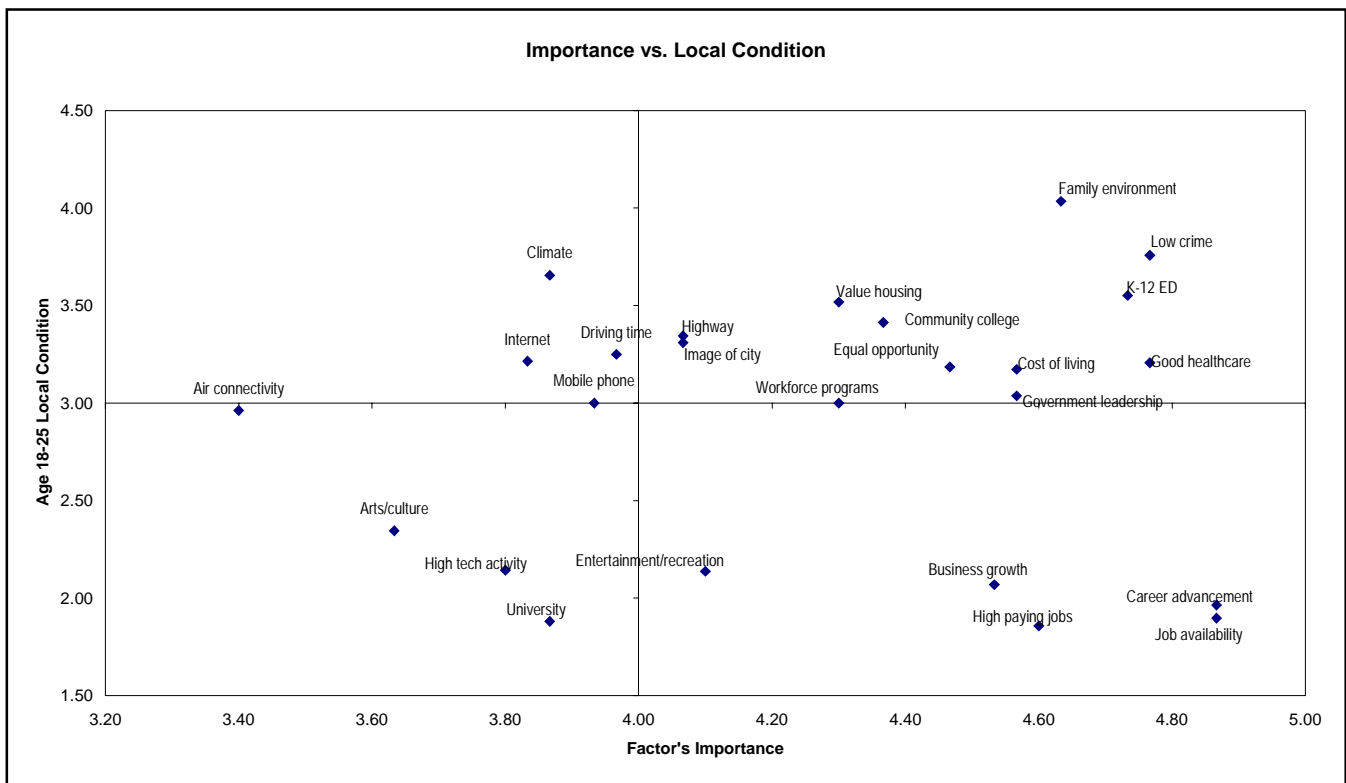
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our county"
- "The hope is that the decisions made today will improve the future for our county and the young people, which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

Other comments include:

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

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

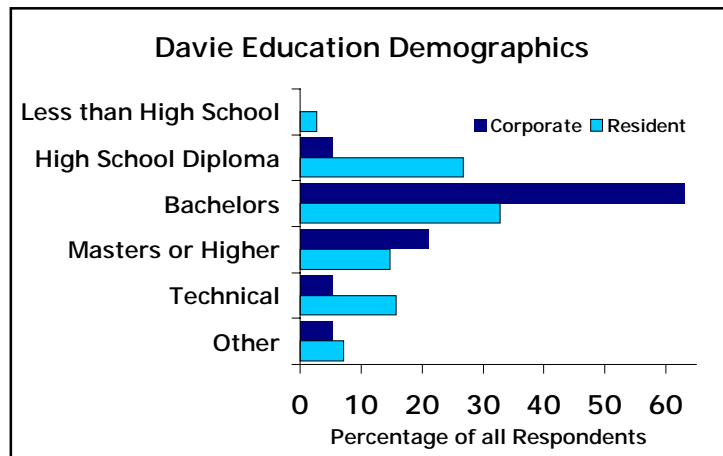
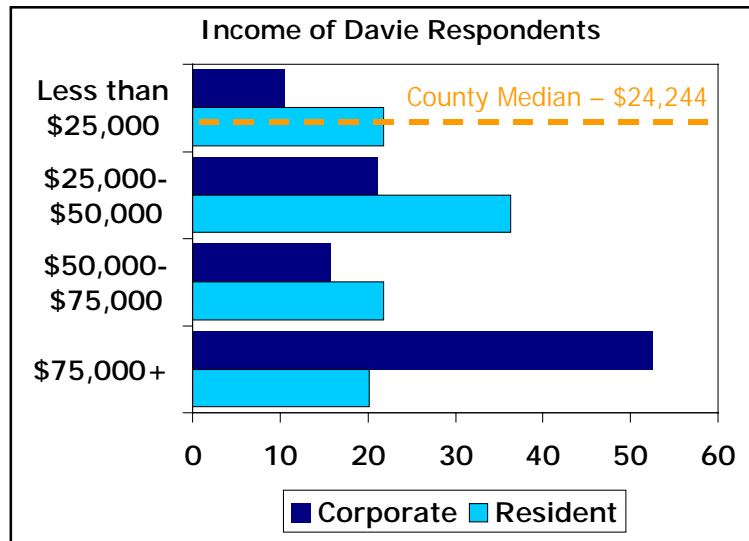
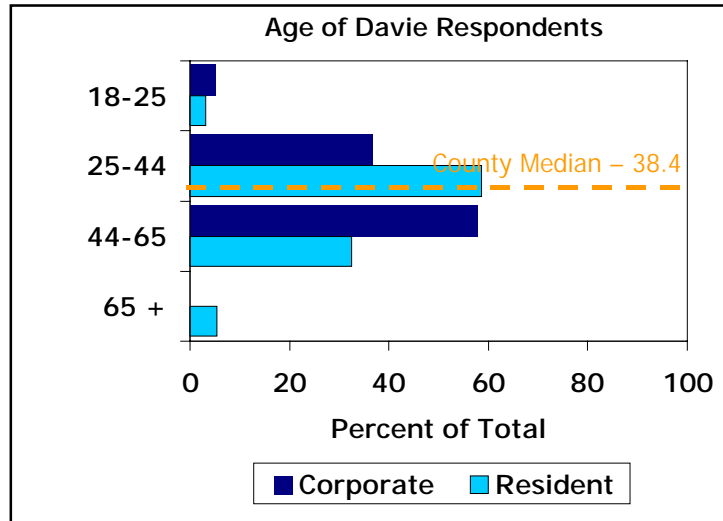
Not surprisingly, the region’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: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

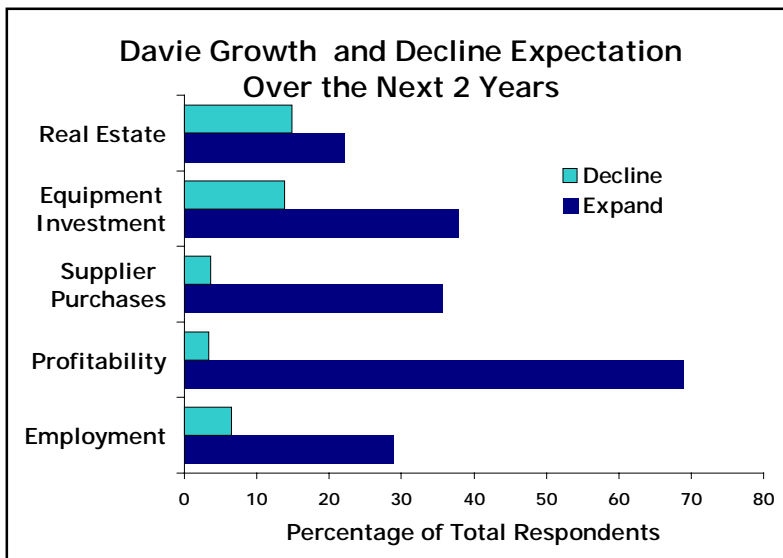
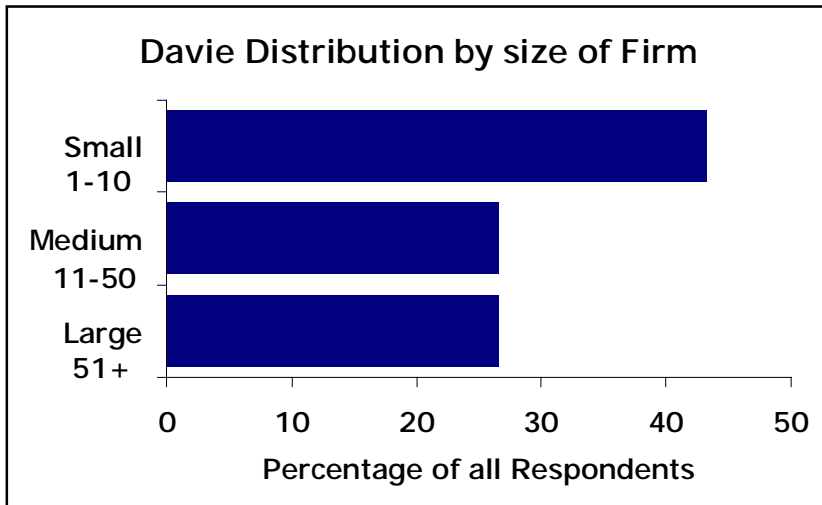
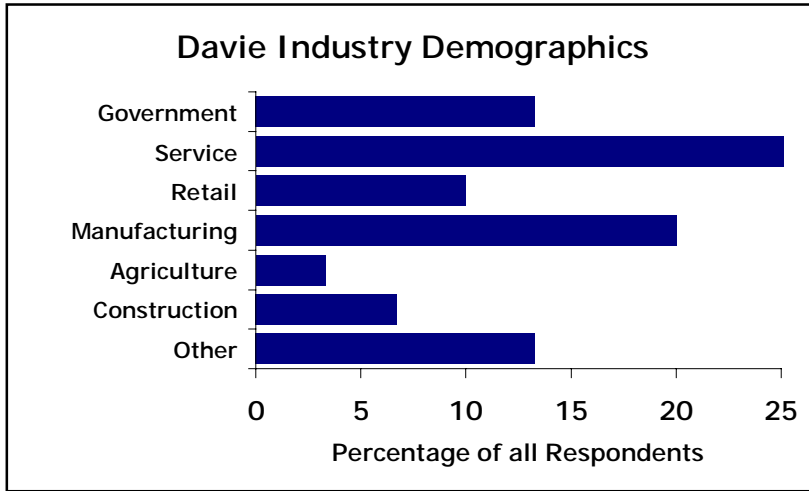


Respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

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

Demographic Profile of Davie 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	ALL 9 COUNTIES	Manufacturers
Education	8 / 16	7 / 7	3 / 6	6 / 18	4 / 18	3 / 9	2 / 9	2 / 21	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	5 / 9
University	29 / 31	28 / 27	20 / 35	9 / 1	31 / 28	27 / 36	29 / 32	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	15 / 33
Workforce Training Programs	16 / 15	21 / 12	26 / 20	30 / 20	28 / 8	11 / 29	24 / 23	17 / 20	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	14 / 19
Cost of Living	22 / 4	13 / 15	17 / 7	19 / 11	14 / 5	14 / 5	15 / 13	14 / 8	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 / 8
Arts / Culture	34 / 36	33 / 5	29 / 19	19 / 5	34 / 33	33 / 21	34 / 22	34 / 32	34 / 24	36 / 31
Law Crime	7 / 1	3 / 2	6 / 2	12 / 16	6 / 11	7 / 3	9 / 5	3 / 1	8 / 3	11 / 31
Good Healthcare	1 / 22	1 / 14	3 / 15	7 / 2	5 / 7	3 / 7	3 / 4	4 / 14	1 / 7	3 / 4
Family Environment	2 / 2	2 / 1	8 / 1	8 / 3	6 / 3	5 / 2	3 / 2	7 / 4	5 / 1	8 / 15
Climate	28 / 7	30 / 3	23 / 5	22 / 4	32 / 2	28 / 1	28 / 3	25 / 5	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 / 3
Business Climate	6 / 23	12 / 12	3 / 14	5 / 28	6 / 27	16 / 16	3 / 25	5 / 18	9 / 20	4 / 11
Tax Cost	12 / 7	9 / 8	12 / 10	19 / 33	11 / 23	20 / 8	12 / 19	13 / 15	12 / 16	2 / 24
Regulatory Environment	18 / 10	24 / 17	21 / 18	22 / 30	26 / 20	24 / 12	21 / 17	25 / 19	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	19 / 13
Proximity to Customers	33 / 25	25 / 11	17 / 17	27 / 12	19 / 12	13 / 14	30 / 11	31 / 11	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	29 / 17
Availability of Quality Workers	5 / 10	11 / 26	10 / 22	9 / 24	12 / 20	9 / 13	11 / 29	8 / 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	5 / 18
Entrepreneurial Environment	27 / 16	17 / 19	22 / 30	31 / 29	25 / 26	22 / 27	23 / 24	22 / 26	22 / 27	25 / 6
Infrastructure	18 / 16	22 / 22	24 / 24	16 / 21	21 / 22	23 / 20	18 / 18	23 / 24	20 / 23	21 / 25
Air Connectivity	36 / 31	36 / 28	35 / 29	35 / 24	35 / 13	36 / 19	35 / 26	36 / 24	36 / 25	30 / 27
Highway	25 / 30	26 / 33	27 / 7	28 / 13	24 / 14	28 / 16	19 / 7	19 / 3	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 / 7
Mobile Phone Service	22 / 24	23 / 32	29 / 28	33 / 8	18 / 25	25 / 31	24 / 16	24 / 13	25 / 26	27 / 16
High Speed Internet	12 / 6	15 / 18	19 / 11	12 / 6	15 / 10	16 / 25	13 / 14	12 / 9	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	10 / 12
General Economy	10 / 34	5 / 31	1 / 26	3 / 36	9 / 36	9 / 28	7 / 35	6 / 28	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	24 / 34
Effective Government Leadership	2 / 3	8 / 30	7 / 22	2 / 16	1 / 29	1 / 26	8 / 30	11 / 34	6 / 28	16 / 30
Strong Economic Growth	18 / 33	6 / 35	2 / 31	1 / 35	3 / 35	6 / 34	6 / 33	8 / 35	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	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
Survey Respondents	14	73	31	26	66	29	50	36	325	48

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

Importance / Local Condition

	Allegheny	Acha	Barle	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	Davie	Forsyth	Rockingham	Stokes	Surry	Yadkin	COUNTIES	Manufacturers			
Education	0.0 / 78.6	11.2 / 76.1	9.7 / 67.7	22.0 / 64.0	26.0 / 70.2	17.2 / 72.4	8.7 / 87.0	26.7 / 71.4	16.8 / 74	26 / 62.6			
K-12 ED	7.7 / 84.6	11.3 / 81.7	12.9 / 67.7	28.0 / 62.0	15.9 / 76.2	10.3 / 79.3	6.5 / 89.1	17.6 / 76.5	13.5 / 77.2	15.2 / 69.6			
University	46.2 / 16.4	24.6 / 29.1	31.0 / 34.5	32.0 / 56.0	30.2 / 33.3	27.6 / 31.0	26.7 / 37.8	36.3 / 32.4	29.6 / 36.2	23.9 / 17.4			
Community College	61.5 / 30.8	21.1 / 66.3	40.0 / 40.0	41.7 / 45.8	34.4 / 51.6	25 / 67.1	28.9 / 60.0	30.6 / 65.6	31.5 / 52.4	37.8 / 44.4			
Workforce Training Programs	38.5 / 38.5	25.4 / 50.7	29.0 / 29.0	25.0 / 41.7	23.4 / 45.3	24.1 / 65.2	19.1 / 46.8	37.1 / 45.7	26.1 / 45.5	42.8 / 29.2			
Workforce Recruitment / Retention	46.2 / 30.8	23.2 / 65.1	22.6 / 35.5	23.3 / 45.8	26.6 / 53.1	24.5 / 48.3	31.1 / 46.7	25.0 / 50.0	26 / 48.6	34.8 / 47.8			
Cost of Living	53.8 / 20.1	21.7 / 58.0	26.7 / 40.0	32.0 / 44.0	37.5 / 48.4	34.5 / 41.4	31.1 / 48.9	19.4 / 62.8	29.9 / 48.2	34.8 / 39.1			
Entertainment / Recreation	46.2 / 7.7	26.7 / 28.6	35.5 / 19.4	52.0 / 22.0	32.8 / 39.1	34.5 / 20.7	21.7 / 28.3	30.6 / 27.8	31.8 / 30.6	27.7 / 19.1			
Arts / Culture	30.8 / 0.0	36.2 / 25.4	29.0 / 22.6	36.0 / 40.0	28.1 / 28.1	37.9 / 17.2	14.9 / 25.5	19.4 / 30.6	26.5 / 25.6	12.5 / 16.7			
Low Crime	23.1 / 61.5	14.3 / 80.0	22.6 / 61.3	28.0 / 52.0	25.0 / 65.6	31.0 / 65.2	25.5 / 61.7	22.2 / 69.4	22.9 / 66	27.1 / 54.2			
Good Healthcare	23.1 / 76.9	12.9 / 84.3	29.0 / 61.3	36.0 / 60.0	31.2 / 65.6	31.0 / 65.5	31.9 / 68.1	16.7 / 72.2	25.4 / 70.5	27.1 / 64.6			
Family Environment	23.1 / 69.2	12.7 / 80.3	19.4 / 61.3	24.0 / 60.0	26.6 / 64.1	31.0 / 62.1	19.1 / 74.5	19.4 / 63.9	20.9 / 68.7	20.8 / 62.5			
Climate	38.5 / 7.7	29.4 / 29.6	32.3 / 25.8	36.0 / 40.0	26.6 / 26.6	31.0 / 20.7	21.2 / 40.4	38.9 / 27.8	32.2 / 29.1	18.8 / 33.3			
Good Value Housing	53.8 / 30.8	33.8 / 62.1	48.4 / 32.3	40.0 / 32.0	33.3 / 46.0	41.4 / 37.9	48.9 / 36.2	41.2 / 38.2	40.3 / 41.2	37.5 / 37.5			
Business Climate	30.8 / 61.5	16.9 / 69.0	45.2 / 51.6	24.0 / 68.0	23.4 / 67.2	31.0 / 44.8	27.7 / 70.2	25.0 / 66.7	26.9 / 64.2	25 / 66.7			
Tax Cost	30.8 / 46.2	23.2 / 65.2	22.6 / 51.6	28.0 / 48.0	25.0 / 57.8	31.0 / 41.4	22.2 / 57.8	27.8 / 47.2	25.3 / 54.8	25 / 66.7			
Regulatory Environment	30.8 / 38.5	24.6 / 42.5	30.0 / 33.3	48.0 / 32.0	28.1 / 42.2	28.6 / 32.1	37.0 / 41.3	36.1 / 30.6	31.5 / 38.3	27.1 / 50			
State and Local Incentives / Assistance	15.4 / 30.8	24.6 / 39.1	16.1 / 29.0	16.0 / 36.0	28.1 / 35.9	36.7 / 28.6	31.9 / 31.9	36.1 / 30.6	26.8 / 33.9	35.4 / 37.5			
Proximity to Customers	30.8 / 15.4	20.0 / 48.6	25.8 / 45.2	24.0 / 44.0	23.8 / 49.2	28.6 / 50.0	27.7 / 38.3	28.6 / 31.4	25 / 43.3	25 / 16.7			
Proximity to Suppliers	23.1 / 7.7	21.4 / 25.7	16.1 / 9.7	40.0 / 8.0	23.8 / 23.8	17.9 / 25.0	19.1 / 23.4	28.6 / 22.9	22.1 / 20.8	25 / 18.8			
Availability of Quality Workers	46.2 / 53.8	23.9 / 64.8	26.7 / 56.7	32.0 / 56.0	32.8 / 50.0	31.0 / 58.6	23.4 / 61.7	33.3 / 58.3	29.2 / 58.1	27.1 / 68.8			
Cost of Labor	46.2 / 38.5	21.0 / 47.9	35.5 / 41.9	36.0 / 44.0	29.7 / 43.8	24.1 / 41.4	32.6 / 42.6	33.3 / 41.7	32.1 / 42.8	29.2 / 60.4			
Entrepreneurial Environment	30.8 / 20.1	26.8 / 49.3	25.8 / 35.5	32.0 / 28.0	40.3 / 35.5	24.1 / 37.9	40.4 / 38.3	41.7 / 33.3	33.4 / 37.9	41.7 / 22.9			
Infrastructure	30.8 / 38.5	25.7 / 45.7	43.3 / 23.3	45.8 / 37.5	35.9 / 42.2	25.0 / 35.7	38.6 / 43.2	42.9 / 34.3	35.1 / 39.3	53.2 / 23.4			
Air Connectivity	18.2 / 18.2	20.0 / 18.5	13.8 / 6.9	32.0 / 20.0	20.6 / 23.8	7.1 / 10.7	20.0 / 22.2	31.4 / 14.3	20.6 / 17.9	20 / 20			
Highway	46.2 / 15.4	36.7 / 37.1	26.7 / 23.3	32.0 / 36.0	34.4 / 39.1	27.6 / 31.0	36.2 / 42.6	48.6 / 34.3	35.5 / 35.1	41.7 / 31.2			
Driving Time to Business Destinations	38.5 / 7.7	24.3 / 22.9	36.7 / 10.0	44.0 / 20.0	32.8 / 25.0	21.4 / 14.3	36.2 / 23.4	33.3 / 27.8	34.2 / 21.1	29.2 / 12.5			
Mobile Phone Service	38.5 / 38.5	38.0 / 43.7	29.0 / 22.6	40.0 / 20.0	32.3 / 46.8	31.0 / 31.0	29.8 / 38.3	50.0 / 25.0	35.7 / 36	27.1 / 25			
High Speed Internet	46.2 / 38.5	25.4 / 67.7	36.7 / 30.0	40.0 / 48.0	21.9 / 54.7	24.1 / 48.3	21.2 / 55.3	44.4 / 44.4	29.2 / 50.2	35.4 / 33.3			
Cost of Utilities	46.2 / 46.2	27.1 / 61.4	46.7 / 33.3	40.0 / 36.0	34.9 / 39.7	41.4 / 34.5	26.2 / 46.8	30.6 / 44.4	35.5 / 45	31.9 / 53.2			
General Economy	38.5 / 46.2	23.9 / 70.4	37.9 / 58.6	16.7 / 76.0	29.7 / 62.5	24.1 / 65.2	19.1 / 70.2	26.7 / 62.9	26 / 64.7	27.7 / 57.4			
Image of City as a Place to do Business	23.1 / 53.8	24.3 / 57.1	40.0 / 33.3	20.0 / 72.0	18.8 / 64.1	31.0 / 44.8	25.5 / 48.9	25.0 / 41.7	25.2 / 53.2	27.1 / 33.3			
Effective Government Leadership	38.5 / 61.5	22.5 / 70.4	36.7 / 53.3	12.0 / 80.0	23.4 / 73.4	31.0 / 69.0	29.8 / 61.7	27.8 / 58.3	26.3 / 67	37.5 / 45.8			
Strong Economic Growth	15.4 / 46.2	16.9 / 74.6	35.5 / 54.8	16.0 / 84.0	17.2 / 75.0	25.0 / 64.3	19.1 / 72.3	27.8 / 61.1	21 / 69.5	29.2 / 54.2			
Location for High Tech	46.2 / 30.8	29.0 / 33.3	30.0 / 10.0	24.0 / 52.0	31.2 / 39.1	35.7 / 14.3	31.9 / 36.2	37.1 / 34.3	31.8 / 32.5	29.2 / 16.7			
R&D Resources	15.4 / 15.4	21.0 / 29.6	17.2 / 6.9	24.0 / 48.0	29.5 / 32.8	20.7 / 24.1	19.1 / 42.6	41.7 / 22.2	26.7 / 29.6	20.8 / 18.8			
Survey Respondents	14	73	31	36	66	29	50	36	310	40			

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

Importance / Local Condition

	Alleghany	Ashie	Davie	Forsyth	Rockingham	Stokes	Sunny	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	Ashie	Beale	Forsyth	Rockingham	Stokes	Sunny	Yadkin	TOTAL	Residents 19-24	Residents 25-44
K-12 ED	5.0 / 2.9	4.6 / 3.6	4.8 / 3.8	4.7 / 3.4	4.8 / 3.0	4.8 / 3.1	4.8 / 3.6	4.8 / 3.0	4.8 / 3.5	4.7 / 3.6	4.8 / 3.5
University	4.1 / 2.0	3.9 / 2.1	3.7 / 2.0	4.4 / 4.2	4.0 / 2.0	3.9 / 1.8	4.1 / 2.3	4.1 / 1.8	4.0 / 2.2	3.9 / 1.9	3.9 / 2.0
Community College	4.5 / 3.5	4.3 / 3.5	4.1 / 3.2	4.0 / 3.8	4.6 / 3.8	4.3 / 1.9	4.7 / 4.2	4.5 / 3.2	4.4 / 3.5	4.4 / 3.4	4.3 / 3.4
Workforce Training Programs	4.5 / 3.2	4.1 / 2.9	4.0 / 2.9	3.8 / 3.1	4.4 / 3.1	4.2 / 2.3	4.4 / 3.1	4.3 / 2.6	4.2 / 2.9	4.3 / 3.0	4.1 / 2.8
Cost of Living	4.7 / 3.3	4.6 / 2.9	4.5 / 3.4	4.4 / 3.5	4.5 / 3.2	4.6 / 3.3	4.5 / 3.1	4.4 / 3.2	4.5 / 3.2	4.6 / 3.2	4.5 / 3.3
Entertainment / Recreation	4.2 / 2.0	3.8 / 2.3	3.8 / 2.4	4.2 / 3.2	4.0 / 1.9	3.7 / 2.4	3.8 / 2.6	3.8 / 2.2	3.9 / 2.4	4.1 / 2.1	4.0 / 2.3
Arts / Culture	3.9 / 2.0	3.4 / 3.1	3.5 / 2.7	4.0 / 3.7	3.7 / 1.9	3.5 / 2.3	3.6 / 2.6	3.5 / 2.0	3.6 / 2.5	3.6 / 2.3	3.4 / 2.4
Law Crime	4.7 / 4.1	4.7 / 3.9	4.8 / 3.8	4.7 / 3.3	4.7 / 3.1	4.7 / 3.7	4.8 / 3.5	4.7 / 3.5	4.7 / 3.6	4.8 / 3.8	4.7 / 3.7
Good Healthcare	4.8 / 3.0	4.7 / 2.8	4.6 / 3.1	4.7 / 4.3	4.7 / 2.9	4.7 / 2.9	4.8 / 3.3	4.7 / 2.8	4.7 / 3.1	4.8 / 3.2	4.6 / 3.0
Family Environment	4.7 / 3.9	4.5 / 3.9	4.7 / 4.0	4.4 / 4.0	4.6 / 3.3	4.6 / 3.8	4.7 / 3.8	4.6 / 3.6	4.6 / 3.8	4.6 / 4.0	4.6 / 3.8
Climate	4.0 / 3.9	3.7 / 3.5	3.9 / 3.7	3.8 / 3.8	3.8 / 3.6	3.7 / 3.8	3.9 / 3.8	3.9 / 3.7	3.8 / 3.7	3.9 / 3.7	3.8 / 3.7
Good Value Housing	4.3 / 3.2	4.3 / 2.9	4.2 / 3.5	4.2 / 3.4	4.3 / 3.3	4.1 / 3.4	4.3 / 3.3	4.2 / 3.4	4.2 / 3.3	4.3 / 3.5	4.3 / 3.3
Air Connectivity	3.4 / 2.2	3.5 / 2.6	3.5 / 3.0	3.7 / 3.2	3.7 / 3.0	3.6 / 2.9	3.6 / 2.9	3.6 / 2.8	3.6 / 2.9	3.4 / 3.0	3.5 / 2.9
Highway Service	4.0 / 2.7	3.9 / 2.5	4.0 / 3.5	4.0 / 3.2	4.1 / 2.9	3.9 / 2.8	4.0 / 3.2	4.1 / 3.0	4.0 / 3.1	4.1 / 3.3	3.9 / 3.2
Driving Time to Business	3.6 / 2.9	3.6 / 2.7	3.7 / 3.6	3.9 / 3.7	3.8 / 3.2	3.8 / 3.0	3.8 / 3.3	3.8 / 3.2	3.8 / 3.2	4.0 / 3.3	3.8 / 3.3
Mobile Phone Service	3.6 / 2.8	3.5 / 2.5	3.7 / 2.9	3.4 / 3.6	3.9 / 2.7	3.8 / 2.2	3.5 / 3.0	3.9 / 2.8	3.7 / 2.8	3.9 / 3.0	3.8 / 2.8
High Speed Internet Connectivity	3.8 / 3.1	4.1 / 2.6	3.8 / 3.2	3.9 / 3.8	4.0 / 3.1	3.8 / 2.4	3.9 / 3.1	3.9 / 3.0	3.9 / 3.1	3.8 / 3.2	3.9 / 3.0
Job Availability	4.5 / 1.5	4.6 / 1.7	4.4 / 2.3	4.6 / 2.6	4.7 / 1.6	4.6 / 1.8	4.7 / 1.7	4.6 / 2.1	4.6 / 1.9	4.9 / 1.9	4.6 / 1.9
Career Advancement Opportunities	4.3 / 1.4	4.4 / 1.8	4.3 / 2.3	4.5 / 2.7	4.6 / 1.8	4.5 / 1.8	4.6 / 1.8	4.3 / 2.0	4.5 / 2.0	4.9 / 2.0	4.5 / 2.0
High Paying Jobs	4.1 / 1.3	4.4 / 1.5	4.3 / 2.1	4.4 / 2.5	4.5 / 1.5	4.4 / 1.7	4.5 / 1.7	4.4 / 1.8	4.4 / 1.8	4.6 / 1.9	4.5 / 1.8
Equal Opportunity Based on Gender / Race	4.1 / 2.9	4.2 / 2.9	4.2 / 3.1	4.1 / 3.1	4.3 / 2.7	4.1 / 2.7	4.4 / 2.7	4.1 / 2.9	4.2 / 2.9	4.5 / 3.2	4.1 / 2.9
Image of City as a Place to Live	4.1 / 2.4	3.8 / 3.3	3.9 / 3.5	4.1 / 3.1	4.2 / 2.4	3.9 / 2.9	4.0 / 3.3	3.8 / 2.9	4.0 / 3.0	4.1 / 3.3	3.9 / 3.1
Effective Government Leadership	4.7 / 2.9	4.5 / 2.7	4.6 / 3.0	4.6 / 3.1	4.6 / 2.4	4.6 / 2.3	4.6 / 2.7	4.6 / 2.3	4.6 / 2.7	4.6 / 3.0	4.5 / 2.6
Strong Business Growth	4.4 / 1.9	4.4 / 2.0	4.2 / 2.6	4.5 / 2.6	4.6 / 1.6	4.3 / 1.8	4.5 / 1.8	4.5 / 1.8	4.4 / 2.1	4.5 / 2.1	4.4 / 2.1
Location for High Tech Activity	4.0 / 2.5	4.1 / 2.2	3.7 / 2.3	4.2 / 2.8	4.1 / 1.9	3.7 / 1.8	4.1 / 2.1	4.1 / 1.9	4.0 / 2.2	3.8 / 2.1	4.0 / 2.0
AVERAGE RATING FOR ALL FACTORS	4.2 / 2.7	4.1 / 2.7	4.1 / 3.0	4.2 / 3.4	4.3 / 2.6	4.1 / 2.6	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	33.1 / 66.9
Air Connectivity	28.2 / 71.8	29 / 71	33.0 / 67.0	34.1 / 65.9	30.7 / 69.3	28.7 / 71.3	24.5 / 75.5	27.3 / 72.7	29.4 / 70.6	36.7 / 63.3	29.9 / 70.1
Highway Service	36.8 / 63.2	32.7 / 67.3	42.9 / 57.1	49.4 / 50.6	38.7 / 61.3	43.7 / 56.3	38.9 / 61.1	45 / 55	40.8 / 59.2	40 / 60	44.5 / 55.5
Driving Time to Business	44.6 / 55.4	34.6 / 65.4	33.2 / 66.8	39.8 / 60.2	33.9 / 66.1	25.8 / 74.2	42.3 / 57.7	34.8 / 65.2	36 / 64	40 / 60	38.8 / 61.2
Mobile Phone Service	33.3 / 66.7	32.4 / 67.6	27.1 / 72.9	24.1 / 75.9	34.5 / 65.5	31 / 69	37.7 / 62.3	42 / 58	32.9 / 67.1	36.7 / 63.3	31 / 69
High Speed Internet Connectivity	37.0 / 63.0	25 / 75	20.9 / 79.1	30.1 / 70.0	34.1 / 65.9	21.3 / 78.7	35.9 / 64.1	37.5 / 62.5	29.9 / 70.1	23.3 / 76.7	26.4 / 73.6
Job Availability	24.2 / 75.8	17.1 / 82.9	22.6 / 77.4	32 / 68	14.4 / 85.6	15.2 / 84.8	19.8 / 80.2	26.8 / 73.2	21 / 79	13.3 / 86.7	20.5 / 79.5
Career Advancement Opportunities	40.0 / 60.0	18.3 / 81.7	27 / 73	31.5 / 68.5	21.2 / 78.8	22.7 / 77.3	27.4 / 72.6	39.1 / 60.9	26.9 / 73.1	13.3 / 86.7	27.7 / 72.3
High Paying Jobs	32.3 / 67.7	21.9 / 78.1	28 / 72	42.7 / 57.3	29.9 / 70.1	25 / 75	31.7 / 68.3	34.8 / 65.2	30.1 / 69.9	26.7 / 73.3	28.6 / 71.4
Equal Opportunity Based on Gender / Race	34.4 / 65.6	27.9 / 72.1	23 / 77	28 / 72	19 / 81	21.6 / 78.4	21.5 / 78.5	28.8 / 71.2	23.8 / 76.2	23.3 / 76.7	21.9 / 78.1
Image of City as a Place to Live	30.7 / 69.3	33.3 / 66.7	32.2 / 67.8	40 / 60	32.5 / 67.5	28.4 / 71.6	34.1 / 65.9	33 / 67	32.9 / 67.1	50 / 50	31.9 / 68.1
Effective Government Leadership	27.6 / 72.4	27.8 / 72.2	25.8 / 74.2	31.3 / 68.7	24.6 / 75.4	21.6 / 78.4	34.3 / 65.7	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

	Allegheny	Ashe	Boyle	Forsyth	Rockingham	Stokes	Surry	Yadkin		Allegheny	Ashe	Boyle	Forsyth	Rockingham	Stokes	Surry	Yadkin
Companies									Residents								
Education	6	4	1	2	7	5	3	3	K-12 ED	1	3	2	5	7	6	4	3
K-12 Ed	2	3	1	5	7	6	4	3	University	4	3	5	1	6	3	2	7
University	5	2	7	1	3	3	6	4	Community college	5	4	6	3	2	3	1	7
Community College	7	5	6	3	2	3	1	4	Workforce programs	1	6	5	3	4	3	2	7
Workforce programs	3	5	4	1	2	3	7	6	Cost of living	3	3	2	1	5	4	7	6
Workforce Recruit/Retain	1	6	2	3	5	3	4	7	Entertainment/Recreation	7	5	4	1	3	2	2	6
Cost of Living	1	3	3	2	4	5	7	6	Arts/Culture	7	2	3	1	3	5	4	6
Entertainment/Rec	7	2	4	1	3	5	3	6	Low crime	1	2	3	7	3	4	6	5
Arts/Culture	7	2	3	1	3	5	4	6	Good healthcare	4	3	3	1	6	5	2	7
Low Crime	1	4	2	7	3	5	6	3	Family environment	3	4	1	2	3	6	5	7
Good healthcare	7	3	5	1	3	4	2	6	Clinicals	1	3	5	3	7	4	2	6
Family environment	2	6	1	3	7	5	4	3	Value housing	7	3	1	2	5	3	6	4
Clinicals	5	7	4	2	6	1	3	3	Air connectivity	3	7	2	1	3	5	4	6
Value housing	7	3	1	2	3	4	6	5	Highway	7	3	1	3	5	6	2	4
Business Clinicals	3	3	1	2	3	7	6	5	Driving time	7	3	2	1	4	6	3	5
Tax cost	1	4	2	7	3	3	6	5	Mobile phone	4	7	3	1	6	3	2	5
Regulatory enviro	1	3	2	3	7	4	5	6	Internet	3	7	2	1	4	3	6	6
Incentives	1	7	2	3	4	3	5	6	Job availability	3	5	2	1	7	4	6	3
Customer Proximity	3	6	2	1	4	7	3	5	Career advancement	3	6	2	1	7	5	4	3
Supplier Proximity	3	7	4	1	5	6	2	3	High paying jobs	3	6	2	1	7	5	4	3
Quality workers	1	3	3	2	4	5	7	6	Equal opportunity	3	4	2	1	3	7	6	5
Cost of labor	1	3	5	2	4	2	7	6	Image of city	3	3	1	4	7	5	2	6
Entrepreneurial	1	4	3	2	7	3	5	6	Government leadership	3	5	2	1	6	7	4	3
Infrastructure	2	6	3	1	5	3	4	7	Business growth	4	3	2	1	3	6	5	7
Air connectivity	3	7	3	1	2	5	4	6	High tech activity	2	4	3	1	7	3	6	6
Highway	7	3	3	2	5	6	4	1									
Driving time	7	3	3	1	5	6	2	4									
Mobile phone	5	7	4	1	6	3	3	2									
Internet	2	7	3	1	5	3	6	4									
Utility cost	3	7	1	2	6	5	3	4									
General Economy	5	3	1	2	3	6	7	4									
Image of city for business	5	3	2	1	7	3	4	6									
Effective government	1	5	3	2	6	7	4	3									
Economic Growth	3	4	1	2	3	7	6	5									
Location for high tech	2	4	3	1	6	3	7	5									
R&D resources	2	3	5	1	7	3	6	4									