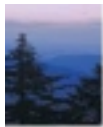


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT Analysis

Forsyth County

July 2003

SWOT Outline

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- b. Purpose of SWOT Report
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Forsyth County SWOT Analysis

July 2003



AngelouEconomics is pleased to present the Forsyth 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 *Forsyth 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.

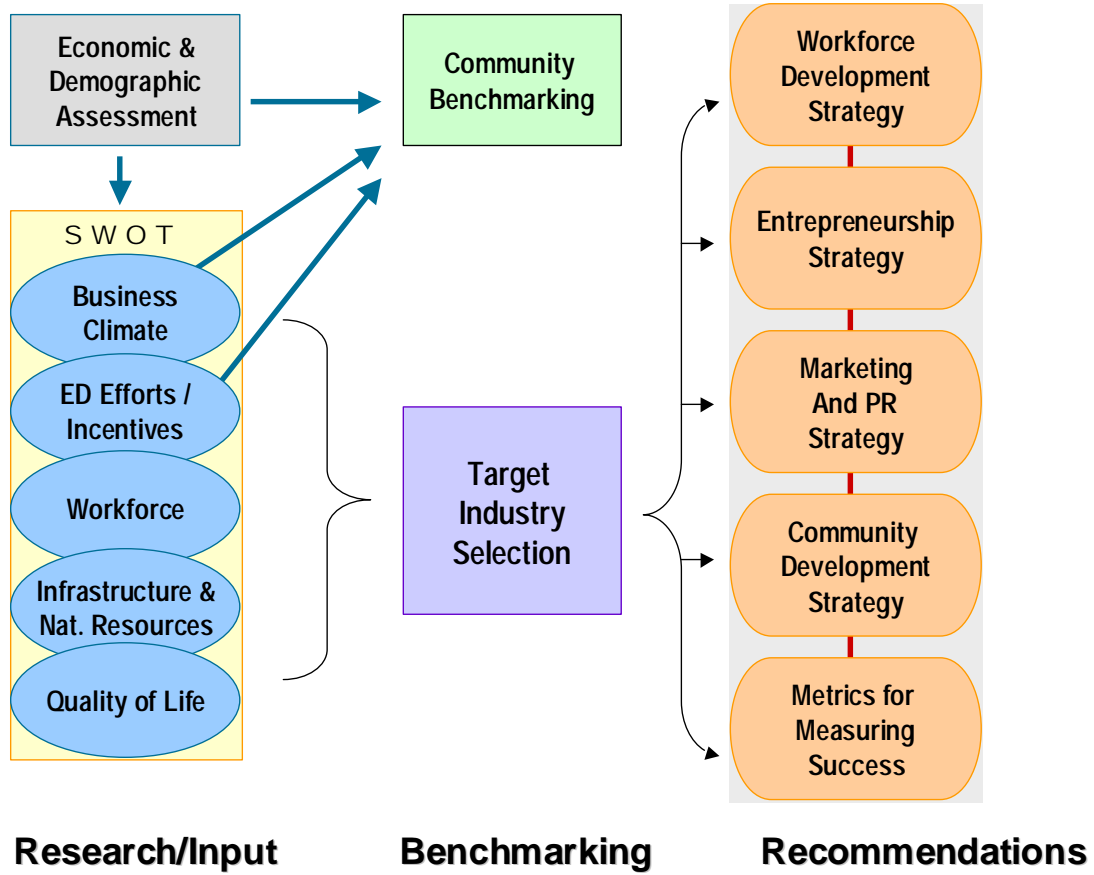
The *SWOT Analysis, Report Two*, takes the investigation of Forsyth County's economic conditions one step further. First, it incorporates the *perceptions* of the County that the consulting team gathered during its interviews, focus groups, County tours, and on-line survey. It also considers how closely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

The community's perceptions of Forsyth 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 AE's project process.

Project Process Diagram



SWOT Analysis Overview

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

In addition to assessing the strengths, weaknesses, opportunities, and threats facing Forsyth 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 – Forsyth County's current state does not meet the needs of existing and future businesses and their workers.

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

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

Key Findings

The SWOT Analysis represents perceptions of Forsyth 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 Forsyth County to provide their thoughts on economic development issues. In total, 171 residents and 147 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.

Forsyth 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>Strong Economic Growth</i>	<i>University</i>	<i>Strong Economic Growth</i>
2 <i>Education</i>	<i>Good Healthcare</i>	<i>State and Local Incentives</i>
3 <i>Business Climate</i>	<i>Arts Culture</i>	<i>General Economy</i>
4 <i>Effective Government Leadership</i>	<i>Family Environment</i>	<i>Image of City</i>
5 <i>Good Healthcare</i>	<i>Climate</i>	<i>Workforce Recruitment</i>

Forsyth County Residents' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Good Healthcare</i>	<i>High Paying Jobs</i>
2 <i>Good Healthcare</i>	<i>University</i>	<i>Job Availability</i>
3 <i>Low Crime</i>	<i>Family Environment</i>	<i>Career Advancement Opportunities</i>
4 <i>Job Availability</i>	<i>Arts Culture</i>	<i>Strong Business Growth</i>
5 <i>Career Advancement Opportunities</i>	<i>Driving Time to Business</i>	<i>Location for High Tech Activity</i>

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

- Downtown Revitalization Initiatives
- Collaboration of Economic Development Organizations
- Forsyth's Regional Role
- Arts and Cultural History

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

Downtown Revitalization Initiatives. Many great plans and projects are being developed in Forsyth County to improve the economy and quality of life. The excitement around these plans and developments is

found everywhere throughout the County, but especially in Winston-Salem. Most cities inevitably use public sector dollars to match federal and foundation grants to improve their communities. Some communities, like Winston-Salem have philanthropic donors who help the public leverage their dollars. One example of private sector participation in Winston-Salem is The Millennium Fund, initiated by Mayor Allen Joines, and managed by the Winston-Salem Alliance. The Millennium Fund is a \$43 million fund dedicated to downtown residential improvement, infrastructure development and economic development. Winston-Salem also has one of the oldest, most well endowed Arts Councils in the United States. This is only a sample of the private funds that have been donated for public improvements. The Downtown Winston-Salem Partnership also has a thorough and updated database of available properties for downtown development. Many of these projects will help Winston-Salem attract younger professionals and will inevitably facilitate the re-creation of a lively downtown. Beyond several other public/private redevelopment projects, below is a list of key programs or projects that the consultants are aware of within Winston-Salem:

- The Piedmont Triad Research Park
- Trolley System
- Civic Plaza
- Unity Place Development
- Goler Redevelopment
- Children’s Museum
- 4th Street Improvements
- Smith Reynolds Airport Redevelopment

Collaboration of Economic Development Organizations. The following organizations have a major role in economic development in Forsyth County:

Organization	Primary Economic Development Mission
Chamber of Commerce	Business Expansion
Downtown Winston-Salem Partnership	Downtown Development
City of Winston-Salem	Infrastructure, Minority Business Development, Redevelopment, Incentives, Funding (grants/loans)
Forsyth County	Infrastructure, Incentives, Funding (grants/loans)
Winston-Salem Business, Inc.	Business Recruitment, Marketing
Piedmont Triad Research Park	Entrepreneurship, Business Expansion
Forsyth County Convention and Visitors Bureau	Tourism
Forsyth Technical Community College	Workforce Development
Northwest Piedmont Council of Government	Workforce Development, Small Business Development
Piedmont Triad Partnership	Business Recruitment, Marketing

The common goal that these primary economic development organizations share is to improve the economy for the City and County. Each of these groups has their own website and marketing materials, with not all of them linking to one another. Additionally, not one organization has overall responsibility for marketing Winston-Salem – each group does external promotion to serve their respective mission and constituent needs and there is no clear responsibility for overall external marketing or internal marketing within the County. Each of these groups has their own funding sources (public, private, membership, grants) to achieve their missions, and they all collaborate effectively on joint projects such as the FedEx project or the Piedmont Research Park. The benefit of having aggressive leadership within several

organizations is that work will get done. However, for continued private sector involvement in Winston-Salem, it will be important that a cohesive and clear message be conveyed to the private sector so that they understand the overall economic development vision for Forsyth County and which organization provides specific services, whether it be funding, tourism, or permitting assistance.

Forsyth's Regional Role. The economic development role that Forsyth County has in the region is currently in transition. Winston-Salem and Greensboro are the economic drivers for the region and a significant number of commuters from all other seven counties in this study impact public services and infrastructure on a daily basis, while traveling into Forsyth for employment or shopping. There is opportunity for Forsyth County to help its neighboring counties improve their economies and create win-win recruitment arrangements and regional tourism strategies.

The industries that Forsyth and the Piedmont Triad have targeted are not known to many of the elected officials and economic developers outside Forsyth. Sharing and education of this information can help community colleges outside Forsyth gear some of their own training and educational efforts towards those targeted industries. AE understands that the major universities and colleges in Forsyth meet several times per year, and that several community colleges meet throughout the year on an informal basis, yet they may want to consider expanding some of this dialogue to include community colleges in neighboring counties. Additionally, the linkages between community colleges and school districts is good within Forsyth County but can be improved in other counties. Forsyth may want to consider assisting other counties in establishing or improving these linkages.

Additionally, a short and long term vision for economic development related to the FedEx Hub and the Piedmont Research Park could be shared with outlying counties. Economic developers and elected officials outside of Forsyth County would benefit from this knowledge.

Arts and Cultural History. Winston-Salem founded the first Arts Council in the United States. This rich history of the arts is truly an asset that has been built upon and could be the focus that will set the region apart in the Southeastern United States. The North Carolina School for the Arts is also located in Winston-Salem. Philanthropic activity towards the arts is one of the highest per capita in the United States. During this time in which the City is trying to lure young professionals to the area, Winston-Salem could build upon the arts and culture as a primary recruitment tool to engage the interest of this younger demographic.

Arts is what Winston-Salem is known for by tourists and businesses. Capitalizing on this asset by utilizing technology, such as digital arts, could help Forsyth County make that transition from the traditional textile/tobacco economy to a new economy. Projects such as the digital arts program of the North Carolina School of Arts that would house approximately 200-300 students downtown are exactly the type of project needed to boost the downtown activity with more housing and retail sales.

Factor 1: Business Climate and Entrepreneurship Development

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

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

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

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

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

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

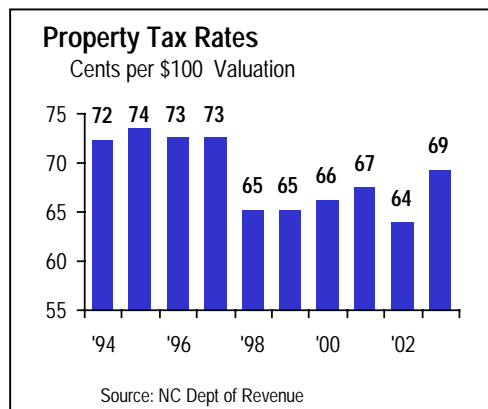
Entrepreneurial environment – The availability and/or access to business incubators, research and development facilities, financing and business advisory networks.

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

Forsyth County's Ratings:

Tax Rates

Forsyth County has the highest property tax rate in the 8-County study region and has seen a slow increase in its rate over the years to reach its current \$0.69. Winston-Salem and Kernersville have the highest city rates in the County though not the highest in the 8-County region.



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

While local property taxes are relatively low in North Carolina, the state's personal and corporate income tax rates are generally higher than neighboring Virginia and South Carolina. Virginia's sales tax rate is lower, and evidence of this can be seen by the loss of some retail spending in northern counties to establishments across the stateline. Low property tax rates and high corporate

income tax rates are generally conducive to an economy based in capital-intensive manufacturing. Without considering the effect of incentives, Forsyth County's tax burden should still be considered attractive to these types of industries.

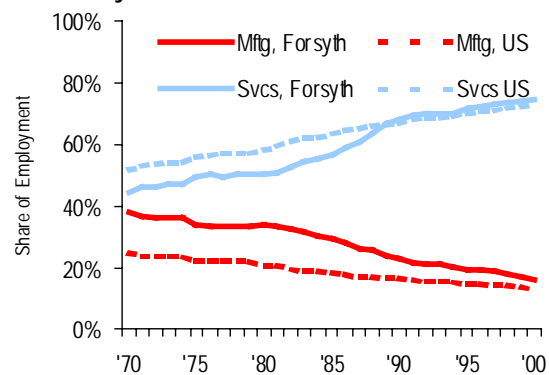
Regulatory Climate

Forsyth County has effective land development regulations that not only help the County achieve its overall vision for land development, but also provide predictability to the private sector. Companies answering the survey have described both the business climate and government as very good. *The Legacy Plan* (a comprehensive plan developed for the City and County) also provides a very clear vision for future land use and development). The permitting process in Winston-Salem may have historically been slow, but recognizing this, the City has co-housed several permitting functions to expedite this process.

Industry growth

Over the last decade the structure of the regional engine has been changing. Textiles and tobacco, while still major employers, have begun to decline. New growth in health services and biomedical have spread throughout the county and will likely shape the future of the larger region. Forsyth County's manufacturing and service employment mix now mirrors the national picture, as the county economy has grown more service-oriented.

Industry Shift, 1970 - 2000



Source: U.S. Bureau of Labor Statistics; AngelouEconomics

Forsyth County has specific industries that it is targeting including: health care, biomedicine, high tech manufacturing, financial services, and information technologies. North Carolina's State office of biotechnology recently opened an office in the Triad through a \$200,000 contribution from Wake Forest University. The Biotech Center has also pledged \$25,000 toward the effort in the first year. Wake Forest University is providing office space, Forsyth Technical Community College is donating hardware, and WinstonNet is providing high-speed Internet access. This will help strengthen Forsyth's ability to effectively target the biotech sector. The health care industry is strong in Forsyth with both the Baptist and Novant hospitals serving a regional market. Additionally, the recent announcement of FedEx to provide a major hub at the Piedmont Triad International Airport will be a huge boom to the economy in the region and will help to support new and existing support industries of FedEx.

Forsyth County's **location** is excellent for business development and tourism. Transportation access via road, rail, and air is very good for business and tourism development, although Forsyth and the region needs to move quickly on their major projects (see Transportation Infrastructure). Residents in Forsyth County have the opportunity to be hiking the Appalachian Trail or kayaking the Dan River within an hour's drive. Conversely, within the same amount of time residents throughout the region can be sipping refreshments in downtown Winston-Salem, while awaiting the start of a program at the Stevens Center for the Performing Arts. Drawing the 6th largest number of visitors in North Carolina can be attributed to (among other factors) the location of Winston-Salem.

Communication and Collaboration

The private sector is greatly involved in development of Forsyth County. It is apparent by seeing the development and redevelopment projects at different stages of completion throughout the County. The Millennium Fund is yet another example of public-private sector collaboration. Philanthropy is alive and well in both the non-profit and private sector development. The areas that can be improved upon within the County and region are workforce development providers, economic development organizations and municipalities communicating and collaborating on projects that benefit the region at large.

The primary economic development organizations in Forsyth County are effective at their respective missions, and collaborate effectively on projects such as the FedEx project. However, to the private sector it is not apparent (lacking a unified conduit for private sector involvement) whom to go to for specific assistance or to become involved in local development. Each of these organizations has their own website and from a marketing perspective, it is not easy navigating the Internet to find information on each type of economic development activity.

Entrepreneurial environment

Several entities provide services for entrepreneurship within Forsyth County and the Triad Region with programs ranging from training, technical assistance, funding, and networking. Survey comments related to entrepreneurship indicate that business startups are not entirely clear on which of the following organizations to contact for specific entrepreneurship services in Forsyth County:

- City of Winston-Salem
- Forsyth County
- Triad Entrepreneurial Initiative (TEI)
- Piedmont Entrepreneurship Network (PEN)
- Wake Forest University
- Winston-Salem State University
- Small Business Development Center
- Winston-Salem Chamber of Commerce

The following are the types of programs and activities for each of the groups engaged in entrepreneurial development in Forsyth County:

Funding for business startup seems to be one of the biggest impediments to furthering entrepreneurship in Forsyth County. The **Piedmont Angel Network** is one of the only angel investor groups in the Piedmont Triad region, yet seems to be under funded to be able to have a large impact on entrepreneurship development.

The **Chamber of Commerce** offers trainings and programs in establishing a business and similar courses. The Chamber was also a lead organization in establishing **Idealliance, Inc.**- a collaborative effort of academic, business, and government partners focused on developing businesses in the biotechnology, pharmaceuticals, nutrition, medical devices, imaging, and information technologies. Idealliance is responsible for the development and oversight of a ten-acre **Piedmont Triad Research Park** in Winston-Salem. The Research Park is in an excellent location

to serve the burgeoning young professional environment that is being fostered downtown and will undoubtedly be very effective at developing numerous business spin-offs. The Research Park has already had success in creating small business, such as in the case of Targacept, Inc, who the Piedmont Triad group fostered from a few employees to over 100 employees in a short period of time. This type of small business generation spun off from the universities and the research park will be a major factor in furthering entrepreneurship in Forsyth County.

Winston-Salem and Forsyth County have formed the **Micro-Enterprise Loan Program** of Winston-Salem and Forsyth County, Inc. that provides services to micro enterprises (defined as small businesses having less than ten (10) employees, and annual sales of less than \$500,000). Businesses that may qualify for micro-loans are businesses that cannot get conventional loans, either because they are start-ups, or because they are too small.

Wake Forest University's new Office of Technology Asset Management (OTAM) works with university faculty, students and staff to commercialize novel discoveries and other intellectual property developed at, or in cooperation with, Wake Forest University and the Wake Forest University School of Medicine. Their objective is the development of new products and services that may benefit the public through technology transfer. Commercialization may occur both through licensing to existing companies or creation of new businesses. OTAM works closely with industry, community leaders, scientists, investors, entrepreneurs, and many others to accomplish its commercialization objectives.

Winston-Salem State University has a Small Business Center that offers training for high-growth, technology-oriented businesses. The **Small Business and Technology Development Center (SBTDC)**, through **Forsyth Tech Community College**, provides management counseling and educational services to small and mid-sized businesses throughout North Carolina from 17 offices across the state — each affiliated with a college or university. The mission of the SBTDC is to help North Carolina businesses grow and create new jobs within the state. This program is in the same building as the Chamber of Commerce and offers synergies with the Chamber's technical assistance programs for businesses.

The **Piedmont Entrepreneurs Network (PEN)** provides business networking and showcasing assistance, promotes access to capital, and programs that enlighten people about business, management, marketing and finance. The Triad Entrepreneurial Initiative (TEI) is a virtual entrepreneurial initiative that works with PEN in serving Forsyth, Davie, Yadkin, Surry, Stokes, and Rockingham Counties. The organization's primary mission is to promote economic development in the North Carolina Piedmont Triad region by fostering the start-up and success of high-growth companies. The Winston-Salem Alliance along with Action Greensboro to fund the Triad Entrepreneurial Initiative with a focus on creating high-growth companies in the North Carolina Piedmont Triad region. Launch Pad is a regional business plan competition for entrepreneurs, and receives praise among the economic developers in the region it serves.

The **Small Business Roundtable**, operated through the Northwest Piedmont Council of Government, is a consortium of public and private sector organizations and individuals collaborating on the use of small business programs offered throughout the region.

Incentive policy

Forsyth County is a Tier 5 County, providing the county with limited incentives for business development. However, neighboring counties such as Rockingham and Yadkin have a much lower Tier status that provides an opportunity for Forsyth to partner with neighboring counties through interlocal agreements for business park and/or a mini-HUBs. This type of cooperative approach to business development will help in improving the regional economy.

Winston-Salem's incentive policy is one geared towards companies with capital-intensive facilities and medium to high numbers of employees. Incentives for small to medium-sized, non capital-intense companies are not prevalent, except for within the entrepreneurial environment described above. However, some permitting assistance, fee waivers, and impact fee reductions are available for business development in Winston-Salem, although it is not a matter of policy.

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

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

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

Factor 2: Workforce & Education

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

Forsyth County's Ratings:

K-12 Education is excellent. Forsyth Independent School District as well as several private and charter schools provide K-12 education. There are more than 40 elementary schools, 16 middle schools, and 11 high schools in the County. Recent bond elections have passed, indicating leadership and a community in support of K-12 Education.

Forsyth Tech Community College has developed several dual degree programs (high school and college credits) with the school district. In addition, Forsyth Tech has also developed a program for high school students who are low performers to prepare them for success in the Community College.

Forsyth County is the hub for **Higher education** in the region. Several institutions, including Wake Forest University, Winston-Salem State University, Salem College and the North Carolina School of the Arts, are all within Forsyth County.

Wake Forest University, a private university, offers programs at the baccalaureate, masters and doctoral levels with emphasis on physical and life sciences, law, business, medicine, technology, and theology. The

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

university promotes economic and technological development through research and specialized programs, such as the Babcock Graduate School of Management, the Angell Center for Entrepreneurship, the Babcock Demon Incubator, the WFU Family Business Center, and as a sponsor of a Small Business and Technology Development Center.

Winston-Salem State University, a member of the North Carolina University System, offers programs at the baccalaureate and masters levels with an emphasis on education, business, technology, and health. The university plays a significant role in regional economic and technological development through research, the School of Business and Economics, and as a sponsor of a Small Business and Technology Development Center.

Salem College is a liberal arts college devoted to women.

The North Carolina School of the Arts trains talented students for professional careers in the arts. School of the Arts graduates go on to dance with the American Ballet Theatre; sing at the Metropolitan Opera; act on Broadway and in film; design Emmy and Tony-Award winning shows; and win student Academy Awards.

Workforce Development for Forsyth County residents is well served. Workforce Development is a huge asset in Forsyth County with all of the following organizations involved in one or more aspects of workforce development:

- Northwest Piedmont Workforce Development Board
- Forsyth Technical Community College
- North Carolina School of the Arts
- Salem College
- The NC Cooperative Extension Service
- Forsyth County Center
- Wake Forest University
- Winston-Salem/Forsyth County Public Schools (including Elementary, Middle and High Schools)
- Winston-Salem State University.

Forsyth Technical Community College that offers a comprehensive two-year college program serving the North Carolina counties of Forsyth and Stokes. Forsyth Tech promotes entrepreneurial and technological development through specialized offerings such as the Small Business Development and Training Center, the Thomas H. Davis Information Technology Center, and its continuing education, certificate, diploma, and associate degree programs. Some of its programs in the areas of health, information systems, and racecar technologies draw students from throughout the United States.

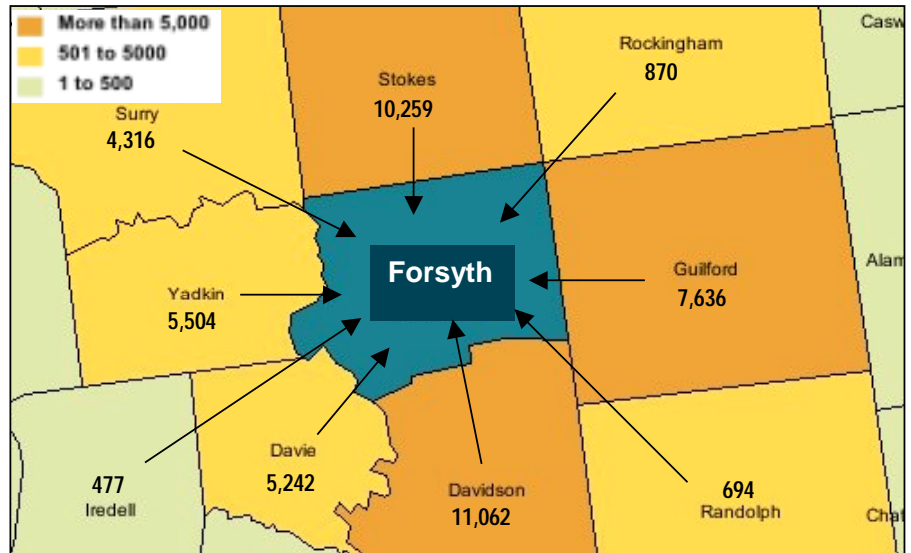
In addition, the Northwest Piedmont Workforce Development Center is a collaborative group of public and private sector organizations that are trying to improve the workforce delivery from a regional approach. Its board has recently adopted a strategic plan to improve the delivery of workforce programs throughout a 5-county region, including Forsyth County. Linking economic development professionals and local government leadership throughout the county with the workforce providers will be a key to their success.

Labor pool

The labor force within Forsyth County is approximately 150,000. However, Forsyth County draws on a labor pool (including Forsyth residents) of more than 650,000 individuals.

Over 40,000 people commute into Forsyth from each of these counties everyday. Those commuting into the county are able to find professional jobs lacking in many of the surrounding communities.

Persons Commuting into Forsyth County for Work, 2000



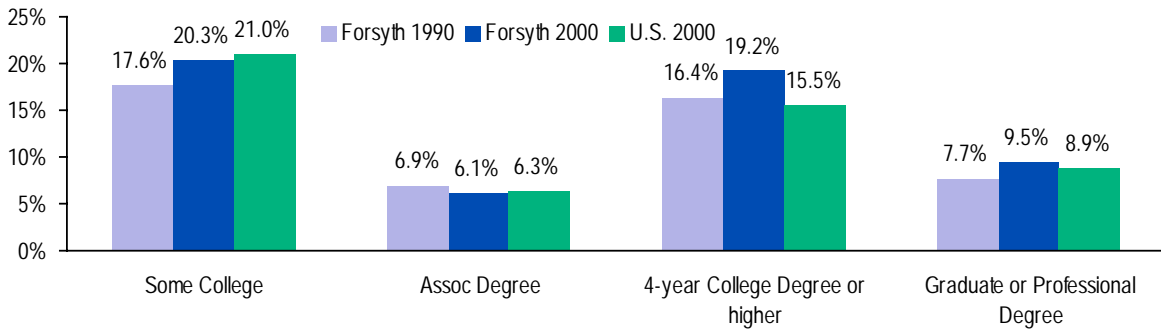
Educational attainment levels

Source: U.S. Census

The county outpaces the national average in the percentage of the population with a Bachelors degree or higher, 19.2 percent versus 15.5 percent for the U.S. The percentage of adults with some college has increased nearly 3 percentage points since 1990. Education is an asset for the County, but not an asset for many of the outlying counties in this study. Given the commuter patterns described above, Forsyth County may consider how it can assist some of these other counties in improving their educational attainment.

Educational Attainment Comparison, 1990 vs. 2000

Adults 25 years or older



Source: U.S. Census Bureau; AngelouEconomics

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 Forsyth's infrastructure are the following:

Land – The costs and availability of commercial and industrial land

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

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

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

Available buildings/sites – The availability of buildings or “shovel ready” sites for commercial, office, or industrial use. “Shovel ready” means sites which have all utilities already in place and which are pre-permitted for specific uses.

Forsyth County's Ratings:

Land available for commercial and industrial development has decreased in the past decade. Numerous sites throughout Forsyth County and in Winston-Salem are being redeveloped. One example of this is the Smith-Reynolds Airport Business Park. This 800-acre Brownfield site (200 acres developed and 200 acres developable) will cater to transportation related uses needing to be in close proximity to rail, air, or interstate including possible FedEx related uses.

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

Several opportunities exist within Forsyth County for redevelopment through the many Neighborhood Revitalization Strategy Areas identified by Winston-Salem. In addition, the Downtown Winston-Salem Partnership provides a database of redevelopment opportunities for private sector investment. These types of infill and redevelopment strategies will work well for Forsyth County as the availability of larger tracts of land decreases in the County. This strategy also follows several goals found in the *Legacy Plan*.

The **Transportation infrastructure** in the County is sufficient for today's business and residential needs but insufficient for future demands. However, numerous plans including a trolley system in Winston-Salem, the Northern Beltway, northern connector to PTIA, US 52 improvements up through Surry County, high speed rail, as well as smaller road improvements are being planned throughout the Forsyth County region.

Freight rail service is excellent – with Norfolk Southern and Winston-Salem Southbound serving the region. Passenger rail service has been discussed as an additional transportation asset for the region and would certainly be an added benefit for business recruitment. For counties outside of Forsyth County to benefit from the FedEx location, the transportation infrastructure will need to be improved – particularly on the northern side of the County.

The **Telecommunications** infrastructure in Forsyth County is excellent. One of the telecommunication assets for Forsyth County is WinstonNet – a 25 mile fiber-optic ring connecting Wake Forest with Forsyth Technical College, Winston Salem State University, and the K-12 School System. In addition, a Wi-Fi system exists in downtown Winston-Salem – allowing users Internet access with wireless technology while enjoying the downtown atmosphere. Assisting neighboring counties obtain a high level of telecommunications asset will certainly help the region in reaching its targeted industries.

Forsyth County has good gas, electric, water and wastewater **Utility** capacity. Winston-Salem and Forsyth County have a joint Utility Commission, and Winston-Salem owns both water and wastewater utilities. The Wastewater Treatment Capacity is 52.18 mg/d, with an average daily use of only 17.85 mg/d. Forsyth also has surplus water capacity, unlike neighboring Guilford County. Natural Gas service is provided by Piedmont; telecommunications service by ALLTEL, GTE, Sprint/Carolina, Sprint/Centel, BellSouth; and electricity service by Duke, Energy United, Surry-Yadkin EMC. All of the utilities are very involved in economic development and major contributors to economic development efforts.

There are approximately six major **Available buildings/sites** in Forsyth County ranging in size from 60 to 200 acres. This is actually a limited number of sites for such a large metropolitan area. All of these sites have available utilities and only one, the larger site, has an existing building on site. The old Smith-Reynolds Airport facility is a unique industrial site that is being considered for redevelopment through numerous financing mechanisms, including a Brownfield Redevelopment grant. Numerous sites and buildings exist on the fringe of Forsyth County and may be something for the County to consider for potential interlocal agreements. The Alliance Science and Technology Park currently has 190 acres but may expand to 490 acres. The Piedmont Triad Research Park is also going to expand an additional 180 acres over the next 20 years.

Factor 4: Quality of Life

AE defines this component as issues that influence an existing or potential resident to reside or a company to expand or relocate in a particular area. Factors that help shape Forsyth'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 quality and access to healthcare in 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 high skilled workers

Parks and recreation – A key factor for families with children who may be considering moving as part of business relocation or providing for a family environment in which to raise their children. This factor also considers cultural and recreational amenities, as well as the recreation and entertainment needs of young professionals.

Forsyth County's Ratings:

The **Safety** in Forsyth is good for an urban area. The crime rate for the County is 72 crimes per 1000 people, including major offenses. Winston-Salem was one of the first cities in the country to adopt a Community Safety Information System as part of the Department of Justice (DOJ) sponsored Strategic Approaches to Community Safety Initiative (SACSI). According to the "SACSI Implementation Action Plan Initial Draft", June 1999, the key findings from the SACSI research analysis

are that juvenile violence is clustered in four specific neighborhoods in Winston-Salem, with hot spots around certain blocks, dead-end streets and convenience stores. Older offenders often tutor younger ones, especially in drug violations. A small number of perpetrators are responsible for most serious crimes. The research is pointing out a need for after school and mentoring programs. The fundamental strategy recommendations from the Strategic Core team are that enforcement, intervention, and prevention

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

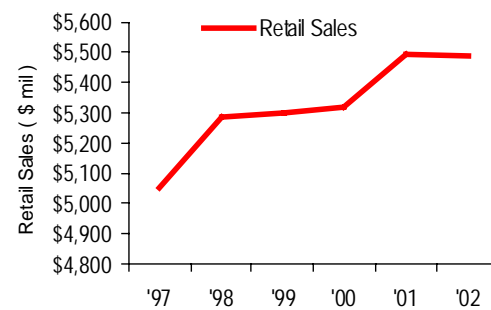
activities are needed. Nevertheless, police are highly visible in Winston-Salem either on foot, bicycle or vehicle. Individuals walk through downtown streets during the late evening with confidence that their safety is not in jeopardy.

Commute times

Although most commuters are traveling into, rather than outside, Forsyth County, the effects of commuter traffic are taxing on transportation infrastructure and air quality. The Piedmont Triad region is one of the three metropolitan areas in North Carolina with the highest levels of air pollution. In 2001, Forsyth County has had 22 days on which the level of ozone exceeded the EPA standards; as a result, the county is at risk of losing federal highway funds for noncompliance with air quality standards. Granted, factors other than automobile pollutants affect non-attainment levels, nonetheless providing alternative means of transportation (such as the trolley system) are viable options for Forsyth to continue to pursue. The Long Range Transportation Plan, which resulted from the *Legacy Plan*, identifies several strategies for improving the transportation system.

Retail choice in Forsyth County is plentiful. Individuals living throughout the region travel into Forsyth to visit the Hanes Mall (one of the largest indoor malls on the East Coast) or small retail shops throughout the County, including the downtown shops. As the chart illustrates, Forsyth County's retail sales has grown over the five years, but growth has leveled out over the past two years.

Retail Sales, 1997 - 2002



Source: NC State Treasurer, NC Dept of Revenue

Health care is one of the best assets for Forsyth County.

Forsyth has four hospitals including the Wake Forest University Baptist Medical Center, Novant Health Triad Region, NC Baptist Hospital and Forsyth Medical Center.

There are over 2,000 beds available and services for any medical care need are available in the County. Forsyth County also serves many of the major medical needs of residents in outlying counties. Several of the hospitals are or will be expanding to serve not only the medical needs of Forsyth County, but also the growing demands coming from residents of outlying counties.

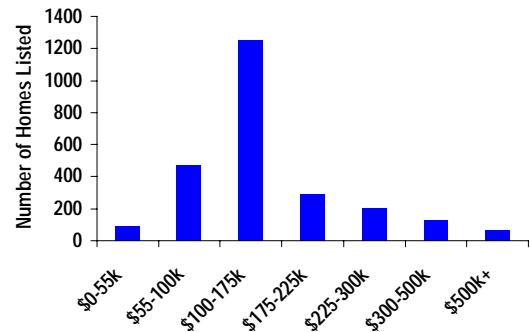
Community image

A significant amount of community improvement projects are either being planned or developed in Winston-Salem and Forsyth County. The most notable include: the Goler Depot Street Renaissance and the Civic Plaza at Fourth Street. Two world-renowned firms have been hired to develop these projects and encourage residential living and shopping downtown. The overall vision for improving the downtown will ultimately result in a well planned, thriving community. This overall image of the community will be a draw to business and residents into Forsyth County.

The **diversity of housing stock** closely mimics that of the State. The majority of housing costs between \$50,000 – 150,000, representing over 60% of the housing stock in the County. Twenty-six percent of rental housing, and eighteen percent of owner-occupied housing is

considered unaffordable (ie., cost of housing is more than 35% of income). The most interesting facet in Winston-Salem's housing market is downtown loft and condominium housing development. Many older buildings, including the Nissen building and RJR buildings are being converted into residential units. This increase in downtown housing will undoubtedly support the burgeoning retail markets in the downtown. A wide range of low-cost options are available. This may be the region's strongest asset for recruiting people.

Homes For Sale
Forsyth County



Source: MLS for 7/21/2003
Zips: 27012, 27040, 27045, 27051, 27101, 27103, 27104, 27105, 27106, 27107, 27127, 27284

Parks and recreation

More than 5,000 acres of parkland are located within Forsyth County, including more than 15 recreation centers, 11 public swimming pools, and 13 special use-facilities. In addition, there are more than 87 public parks, and 20 golf courses. The City of Winston-Salem has plans for a hike and bike trail that would connect several parks and neighborhoods.

Young professional in Winston-Salem are clamoring for more activities geared towards their demographic. AE has seen in survey comments, and heard in personal interviews that, in addition to job opportunities, this is one area that the 25-44 age group would like to see improved. Recognizing this need, Mayor Joines convened a young professionals focus group several years ago to discuss these issues and has been working with leaders in this demographic to come up with solutions.

Factor 5: Economic Development Efforts

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

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

Internal promotion – Focused 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 value-added jobs for sustainable, long-term economic growth within the community.

Forsyth County’s Ratings:

External promotion for Forsyth County is done by all of these primary economic development organizations:

- Chamber of Commerce
- Downtown Winston-Salem Partnership
- City of Winston-Salem
- Forsyth County
- Winston-Salem Business, Inc.
- Piedmont Triad Research Park
- Forsyth County Convention and Visitors Bureau
- Forsyth Technical Community College
- Northwest Piedmont Council of Government
- Piedmont Triad Partnership

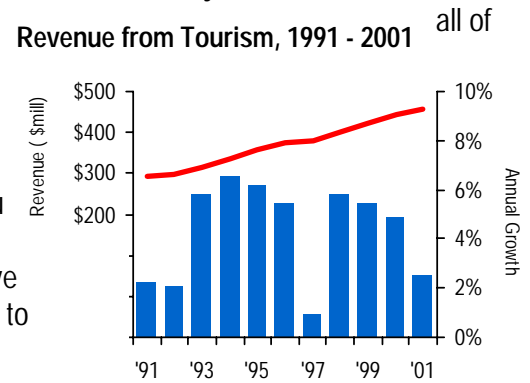
Economic Development Efforts	
<i>"High" = Strong; "Moderate" = Adequate; "Low" = Requires improvement</i>	
Topic	Rating
<i>External promotion</i>	Moderate
<i>Internal promotion</i>	Moderate
<i>Resource allocation</i>	Moderate

Each organization does external marketing to serve their respective missions, be it tourism or business development, and each organization has their own collateral materials and website devoted to their respective mission. Each of them is individually good at their marketing. However, a tourist or a business prospect wants to go to one site for all of their information needs. All of these groups could collaborate more effectively in external promotion.

Web marketing is a natural opportunity for collaboration. For example, the Chamber is naturally the first place a relocating company will look for relocation information on Winston-Salem. While the Chamber devotes a page on its website to “Business Recruitment”, the forwarding link to WSBI is not clearly

identified. An Internet search on “Winston Salem” brings the Chamber to the top of the results list, but WSBI does not appear in the top 100. Given that a majority of research is done over the Internet before a call is placed to a community, more could be done to drive relocation traffic directly to the detailed information found on WSBI’s website, or a central website for these organization may also help in reaching intended marketing targets.

As the chart to the right illustrates, tourism in Forsyth County has increased significantly. The Convention and Visitor’s Bureau is primarily responsible for tourism marketing and is also funded 100% by hotel and motel tax revenue, thus providing an incentive for tourism marketing. Their website is good for directing visitors to hotels and restaurants, and provides numerous pieces of information for the potential tourist.



Source: NC Dept of Commerce

However, economic development is very segmented among regional and local organizations often resulting in confusion in the local community about the division of responsibilities. Moreover, a unified message and brand identity has not been achieved for marketing the region to a target audience. This environment unfortunately does not promote a “one stop shop” venue that is so desperately desired from business. There is considerable room for more collaboration and a strong need for consolidation of economic development efforts.

Internal promotion

A tremendous amount of enthusiasm for economic development initiatives exists in Forsyth County. Public and private groups work effectively together and will do what it takes to support existing or new businesses. However, there is not a unified voice coming from Winston-Salem on what the focus for economic development is or ought to be as well as how the private and non-profit sectors can most effectively engage in the economic development process. Recognizing this, the City and County began an economic development internal marketing campaign with the majority of the primary economic development groups in Forsyth County during 2002. The focus areas in this plan (namely educating the general public, community organizations, senior citizens, educators, and business leaders) will undoubtedly lead the County to a better understanding of the importance of economic development to the community. Yet, economic developers within the County have stated that the majority of the strategic internal marketing plan has not been implemented and point to a lack of a lead group as the reason for the lack of implementation.

Resource allocation for economic development is good. Leveraging public sector and private sector funding is a model for other communities in the country (e.g., the Millenium Fund). Numerous public-private partnerships exist in support of the redevelopment, commercial development, infrastructure development, cultural and entertainment development, as well as other economic development related projects. Resources allocated towards direct business recruitment seems to be geared towards targeted industries, and funding to support entrepreneurial development is certainly being addressed effectively through the Piedmont Triad Research Park and the universities.

Competition for membership and funds is apparent – in particular for WSBI, the Chamber, Downtown Partnership and the Convention and Visitors Bureau (CVB). Competition can generate some good results

such as aggressive leadership and outcomes, but as resources for economic development are impacted by changes in state and local budgets, there may be some opportunities for some of the economic development groups to share certain resources. Some specific areas to consider include:

- **Recruitment of retail.** It is unclear who the lead role is for recruiting major retail to the downtown. Certainly, the Downtown Partnership, WSBI, the CVB and the Chamber all have an interest in this there is not a well-defined primary lead for such an effort.
- **Regional business recruitment/expansion.** It is also unclear whether the Chamber, WSBI, or the Triad Partnership is responsible for business development of those businesses who may be in the region but need help expanding to Winston-Salem.
- **Downtown tourism development strategy.** The Downtown Partnership and the CVB both play a role in downtown tourism development, but with two different yet complimentary missions. The CVB's funding source is tied to hotel occupancy while the Downtown Partnership's funding is from membership dues, County, City and Millenium funds. The two have very good websites geared towards achieving their respective missions, but their marketing efforts are separate.

APPENDIX ONE: Forsyth County Community Input

AngelouEconomics is pleased to present the results of the *Forsyth 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 109 surveys completed for Forsyth County. Of these, 26 responses were from corporations and 83 were from residents.

Summary of the Forsyth County Results

Like most counties in the 8-County CEDS region, Forsyth residents place a high value on education, healthcare, and quality of life issues, but companies viewed economic and government conditions as more important for a business location. Furthermore, "Image of the city as a place to do business" was ranked as a top concern by companies (more so than other counties), but companies are generally pleased with the quality of arts and culture in the County.

Both residents and companies expressed high approval for the County's universities and health care and praised the local climate and family-oriented environment. 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.

In addition to a stronger economy, companies expressed a desire for more incentives and a lower cost environment. Similarly, residents rank job availability and career advancement as top areas needing improvement.

Forsyth 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>Strong Economic Growth</i>	<i>Good Healthcare</i>	<i>General Economy</i>
2 <i>Effective Government Leadership</i>	<i>University</i>	<i>Strong Economic Growth</i>
3 <i>General Economy</i>	<i>Family Environment</i>	<i>State and Local Incentives</i>
4 <i>Image of City</i>	<i>Climate</i>	<i>Tax Cost</i>
5 <i>Education</i>	<i>Arts Culture</i>	<i>Image of City</i>

Forsyth County Residents' Survey Summary		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Good Healthcare</i>	<i>High Paying Jobs</i>
2 <i>Low Crime</i>	<i>University</i>	<i>Job Availability</i>
3 <i>Good Healthcare</i>	<i>Family Environment</i>	<i>Strong Business Growth</i>
4 <i>Job Availability</i>	<i>Climate</i>	<i>Career Advancement Opportunities</i>
5 <i>Effective Government Leadership</i>	<i>High Speed Internet Connectivity</i>	<i>Location for High Tech Activity</i>

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

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

Residents

Rank by Importance / Local Condition

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

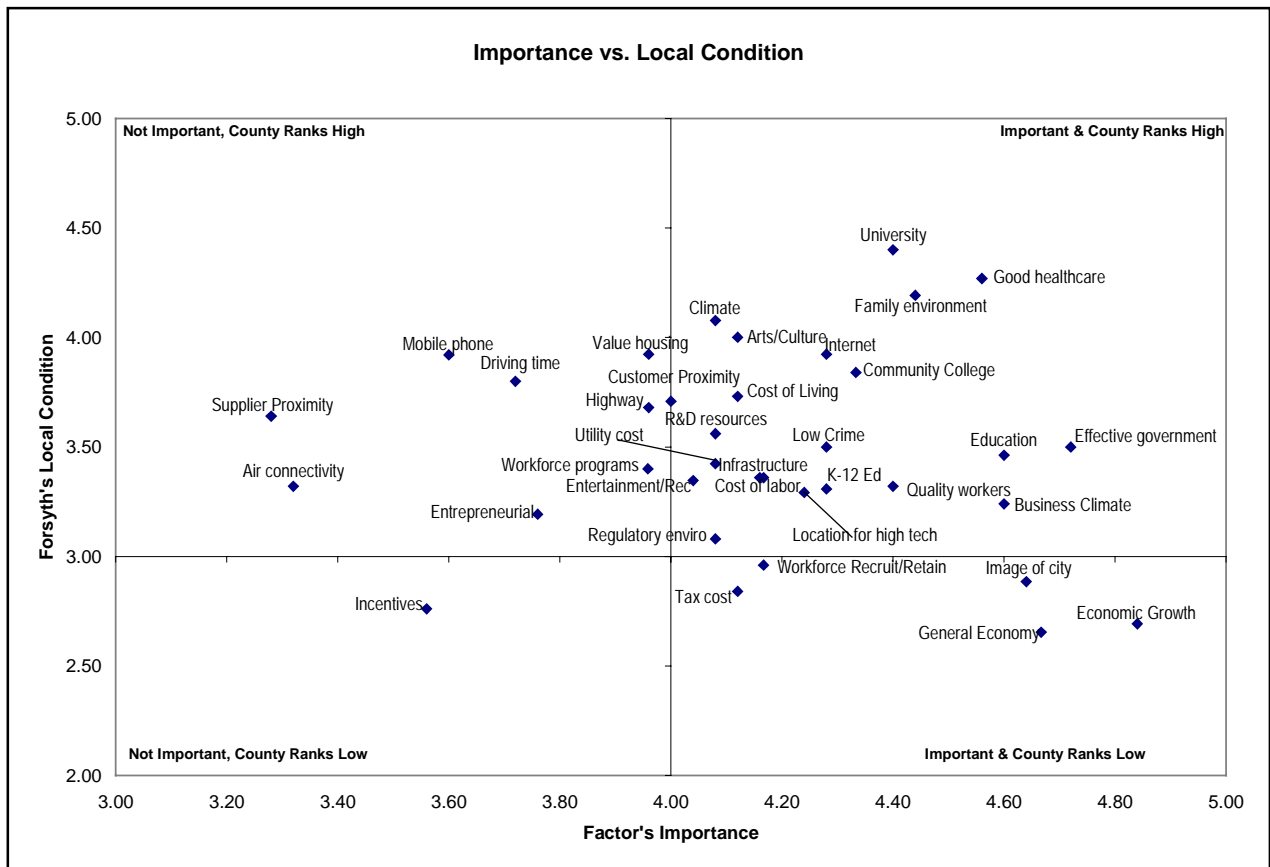
Companies

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

Looking at all factors, economic growth and government leadership were ranked the highest in importance, but were only rated of low to moderate performance. Companies expressed strong satisfaction in the County's universities, moderate satisfaction with the community college system, and below-average satisfaction with workforce programs. Related to this, "Quality workers" is viewed as important, but received a below average ranking for the County. Likewise, companies rated Forsyth's "Ability to recruit/retain workforce" poorly and cost issues (taxes and incentives) also received poor rankings. "Image of the city" is rated as needing improvement.



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

- "We need to foster the start-up of high growth companies"
- "Continued focus on downtown revitalization"
- "County and area must have a vision and understanding of what natural assets and talents this community has"
- "Leaders must improve their communication to residents"
- "Viable strategies for retaining 25-44 workforce"
- "Continue to add research and development courses at university"

Other comments include:

- "Winston-Salem has been the driving force for NWNC"
- "One industry that is working well in the County is tourism"
- "Winston can be considered sleepy quiet and less aggressive"
- "Continue our forward momentum that had been initiated over the past year"

Residents

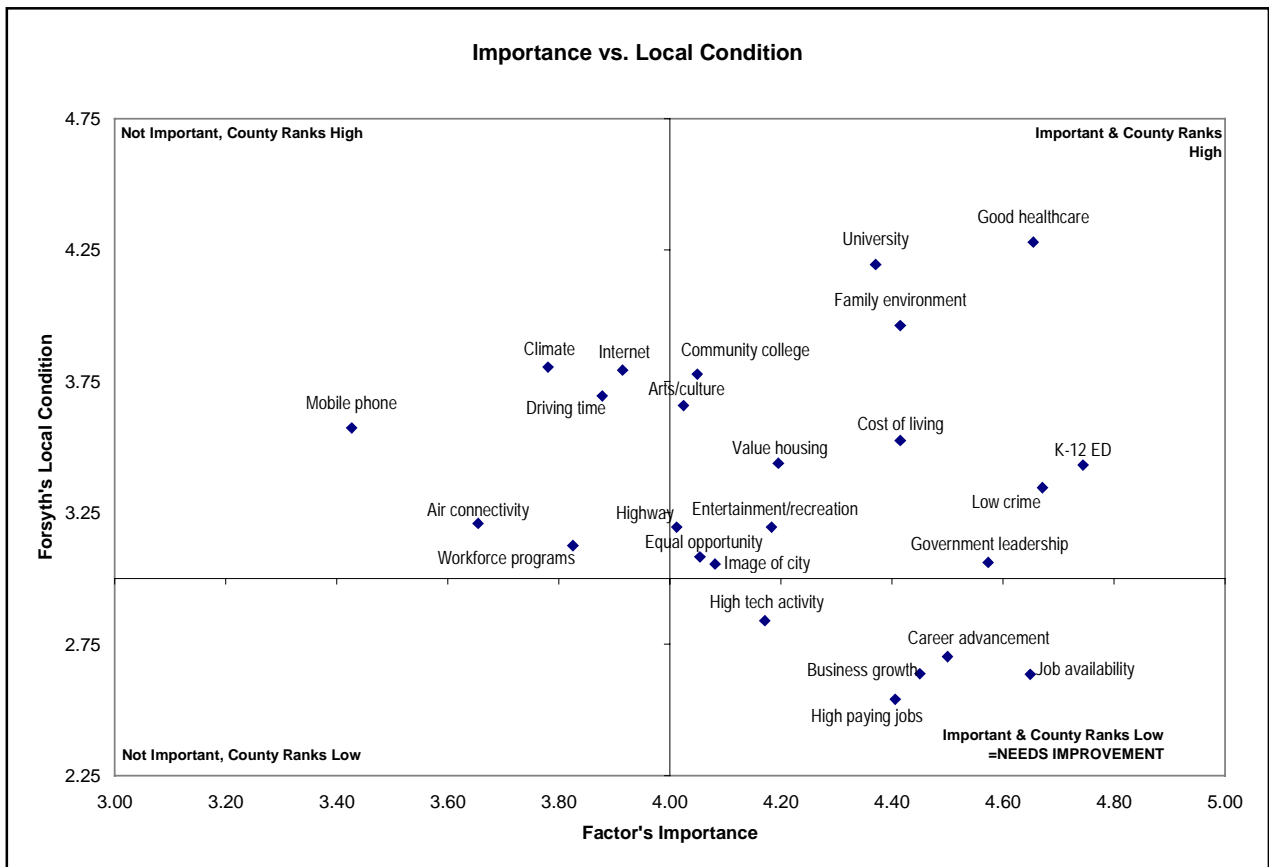
Residents were asked similar questions on importance and satisfaction:

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

As with companies, the most important factor for residents is K-12 education, but Forsyth residents give it only a moderate performance rating. The County's healthcare is ranked the most important and successful factor for the County, but other lifestyle amenities such as low crime and entertainment perform at or below average. Likewise, the most important and successful factors are family environment and low crime.

Residents are generally pleased with the community college system, but rated workforce programs to be average (3.1). Forsyth residents gave "University" the second highest rating (4.2), but rated high tech activity to be poor (2.8).

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 Forsyth's physical resources (climate, housing, highway, Internet), but expressed concern over entertainment and cultural amenities.



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

- "Higher level of program development for our public university"
- "I think we need to be more creative in how we utilize our resources"
- "It would be nice if we didn't have to depend on big corporations for our identity as an area"
- "Improvements in public schools, it is not appealing for people to set up shop in a state that is ranked 49th in the country for education"
- "Incubators for high tech industry"
- "Attract more young single individuals to live downtown"

Other comments include:

- "I think that we can have growth while protecting the beauty of our environment"
- "For the first time I have seen an overall positive attitude in the community"
- "I think there needs to be a higher awareness and greater community pride than we currently have"
- "Manufacturing base is the key to total growth and benefits the greatest number of people"

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>

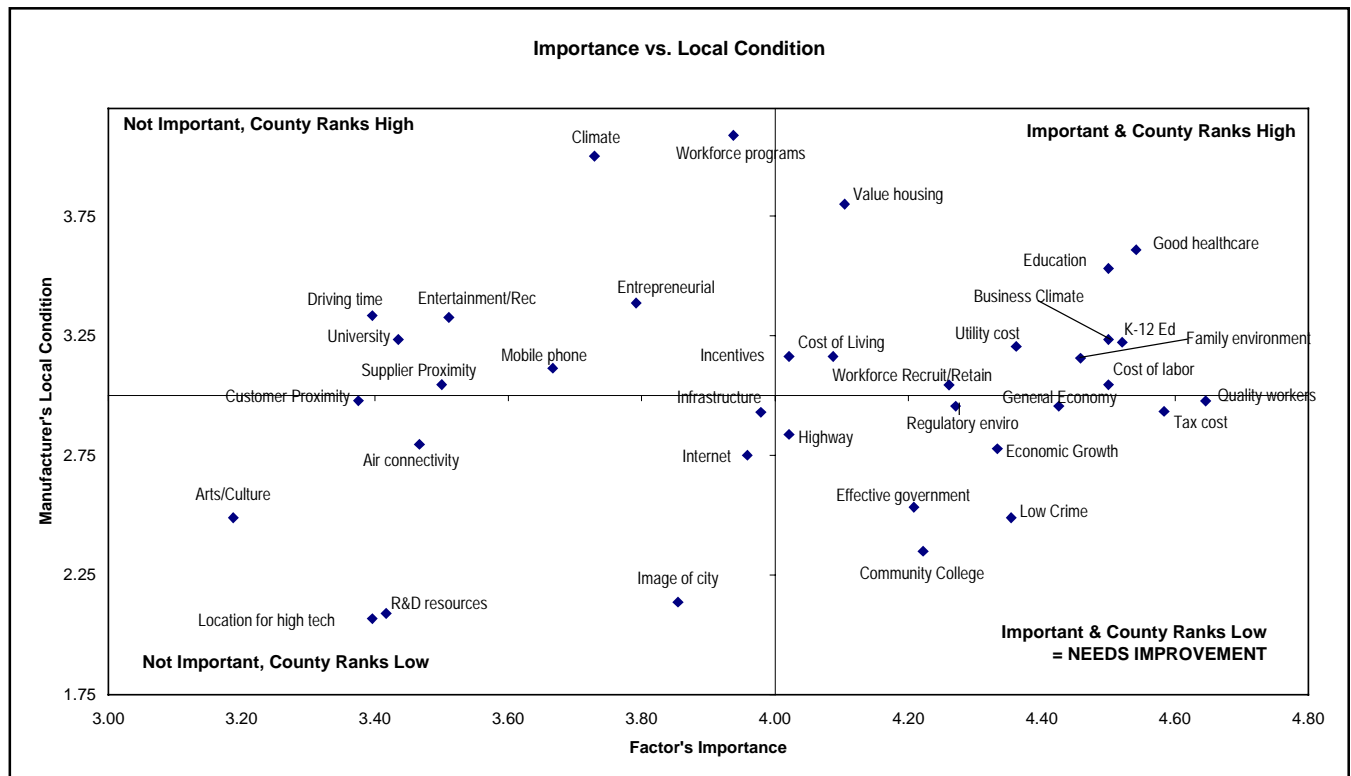
8-County Regional Summary: Residents		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>University</i>
2 <i>Low Crime</i>	<i>Local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

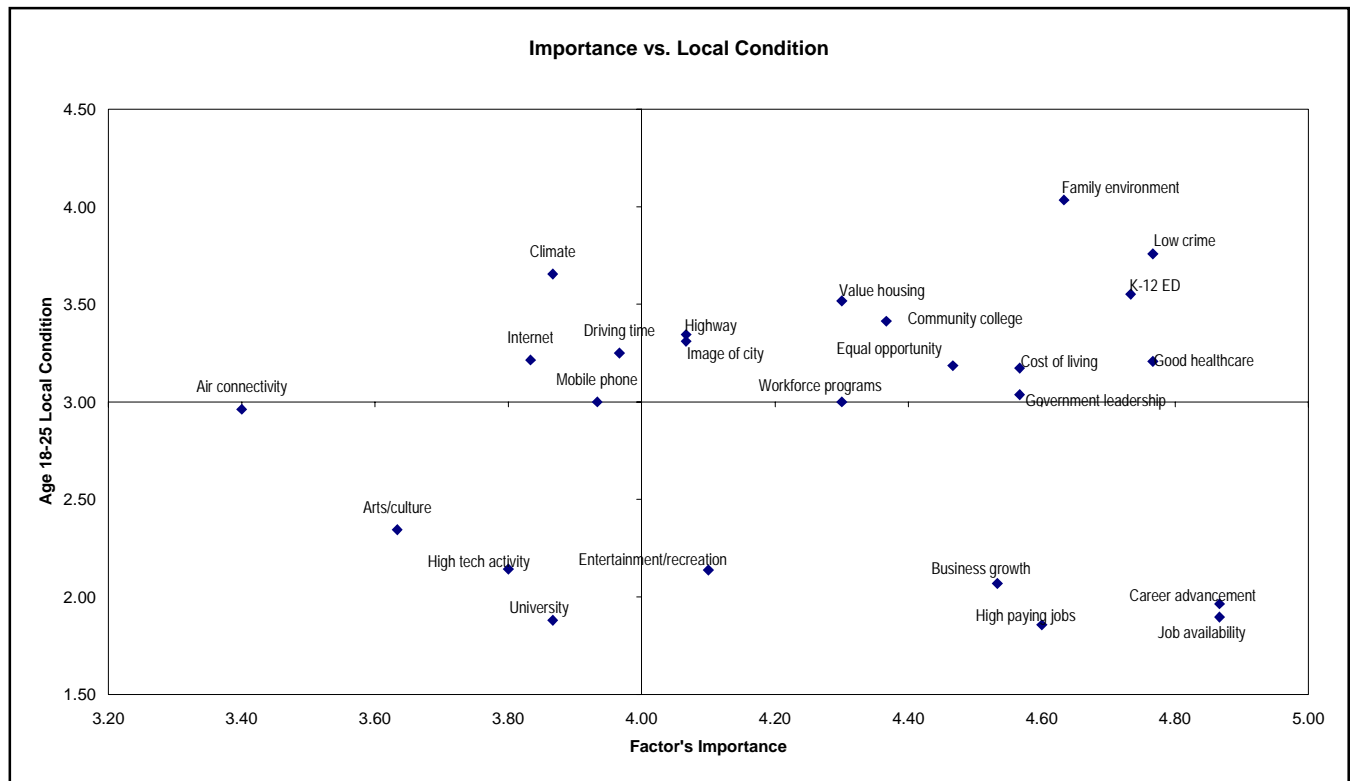
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our County"
- "The hope is that the decisions made today will improve the future for our County and the young people, which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

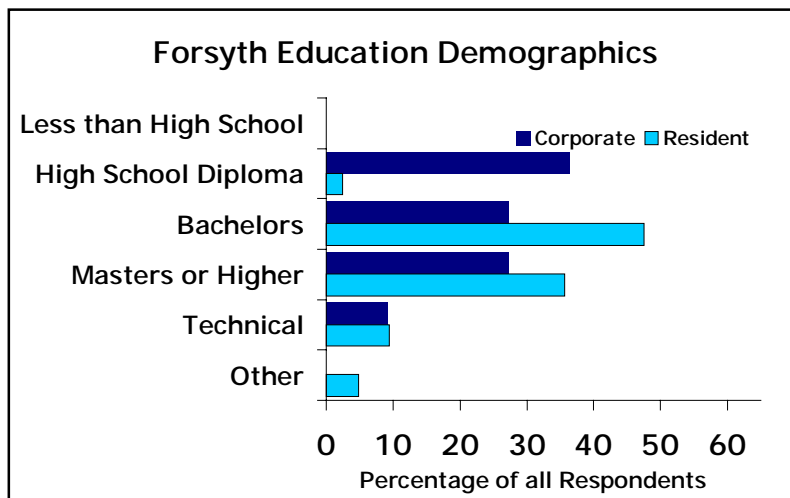
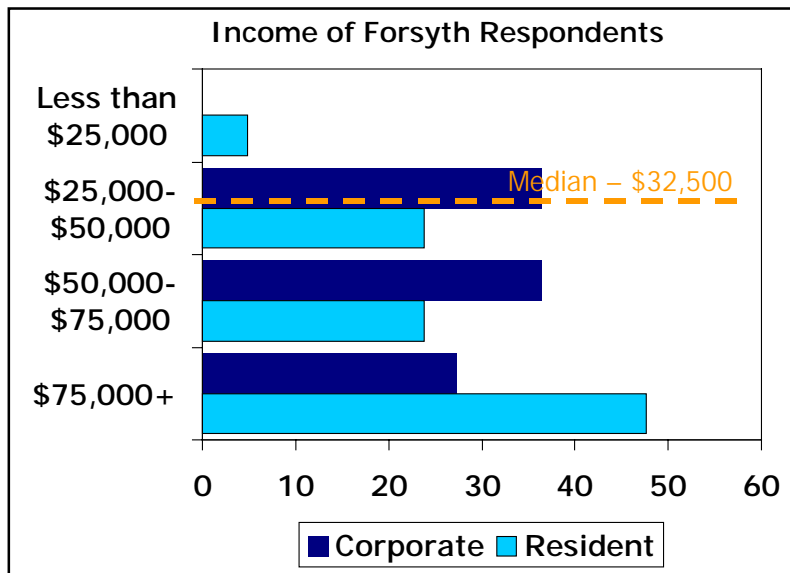
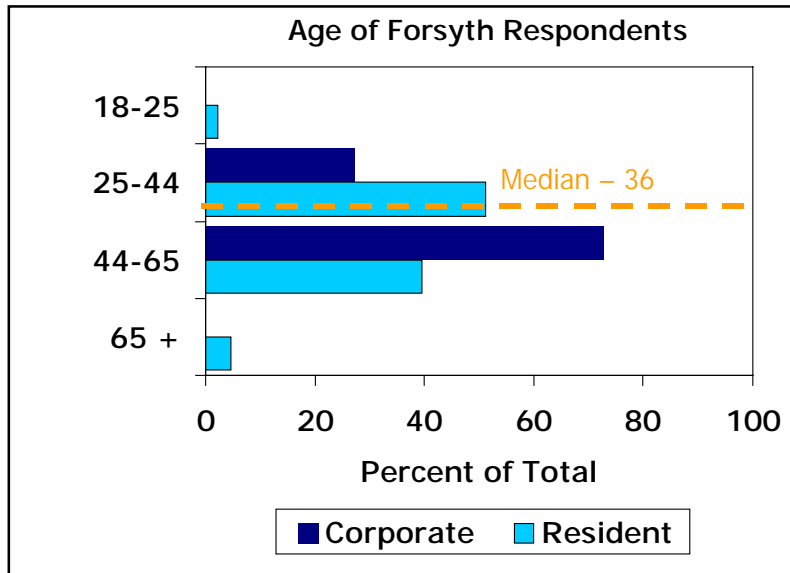
Not surprisingly, the region’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: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

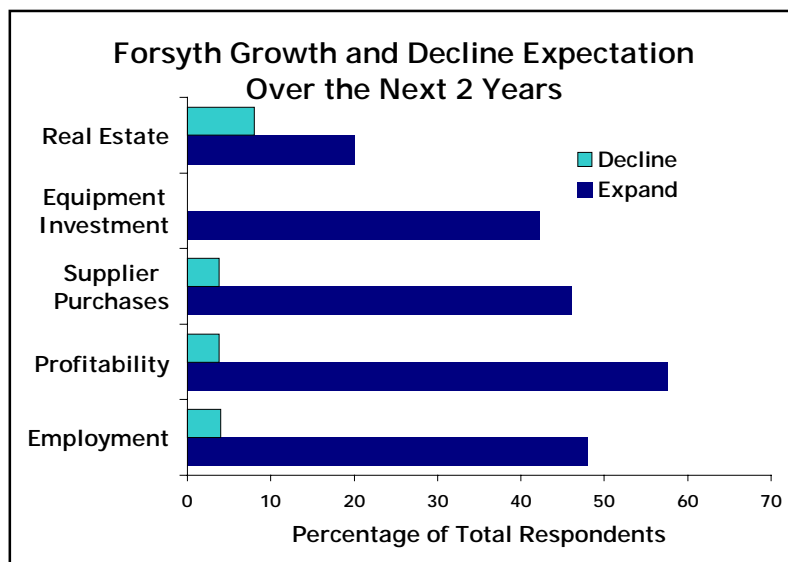
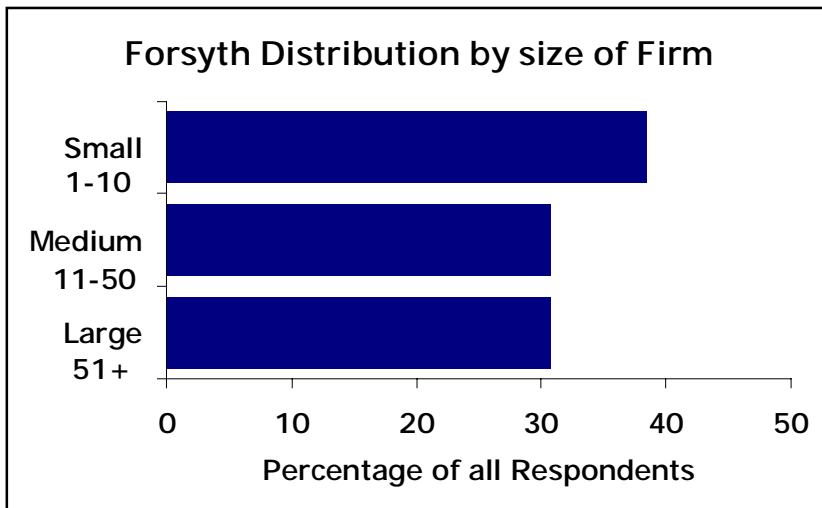
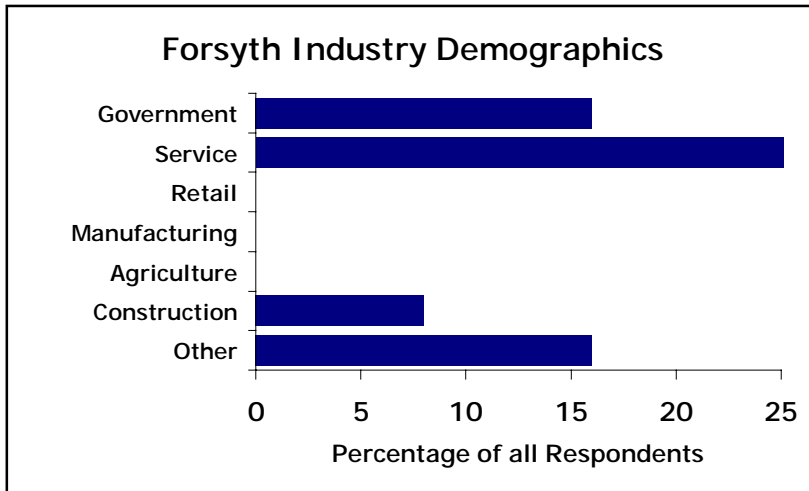


Respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

- “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.”
- “I would be nice to see more established restaurants and hotels”

Demographic Profile of Forsyth 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	5 / 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	5 / 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	5 / 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	25 / 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	14 / 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	5 / 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		Danie		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 / 70.2	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	17.6 / 76.5	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	36.3 / 32.4	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	28.9 / 60.0	30.6 / 65.6	31.5 / 52.4	30.6 / 65.6	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	19.1 / 46.8	37.1 / 45.7	26.1 / 45.5	37.1 / 45.7	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	34.5 / 48.3	31.1 / 46.7	25.0 / 60.0	26 / 48.6	26.6 / 53.1	34.5 / 48.3	31.1 / 46.7	25.0 / 60.0	26 / 48.6	26.6 / 53.1	34.5 / 48.3	31.1 / 46.7	25.0 / 60.0	26 / 48.6	34.5 / 48.3	43.8 / 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	31.1 / 48.9	19.4 / 62.8	29.9 / 48.2	34.5 / 41.4	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	21.7 / 28.3	30.6 / 27.8	31.8 / 30.6	30.6 / 27.8	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	14.9 / 25.5	19.4 / 30.6	26.5 / 25.6	30.6 / 27.8	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	25.5 / 61.7	22.2 / 69.4	22.9 / 66	25.0 / 65.6	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	31.9 / 68.1	16.7 / 72.2	25.4 / 70.5	31.2 / 65.6	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	19.1 / 74.5	19.4 / 63.9	20.9 / 68.7	26.6 / 64.1	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	21.3 / 40.4	38.9 / 27.8	32.2 / 29.1	38.9 / 27.8	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	48.9 / 36.2	41.2 / 38.2	40.3 / 41.2	41.2 / 38.2	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	27.7 / 70.2	25.0 / 66.7	26.9 / 64.2	26.9 / 64.2	26 / 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	22.2 / 57.8	27.8 / 47.2	25.3 / 54.8	27.8 / 47.2	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	37.0 / 41.3	36.1 / 30.6	31.5 / 38.3	36.1 / 30.6	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	31.9 / 31.9	36.1 / 30.6	26.8 / 33.9	35.7 / 28.6	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	27.7 / 38.3	28.6 / 31.4	25 / 43.3	28.6 / 31.4	26 / 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	19.1 / 23.4	28.6 / 22.9	22.1 / 20.8	28.6 / 22.9	26 / 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	23.4 / 61.7	33.3 / 58.3	29.2 / 58.1	33.3 / 58.3	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	33.3 / 41.7	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	40.4 / 38.3	41.7 / 33.3	33.4 / 37.9	41.7 / 33.3	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	38.6 / 43.2	42.9 / 34.3	35.1 / 39.3	42.9 / 34.3	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	20.6 / 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	31.4 / 14.3	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	48.6 / 34.3	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	36.2 / 23.4	33.3 / 27.8	34.2 / 21.1	33.3 / 27.8	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	29.8 / 38.3	50.0 / 25.0	35.7 / 36	50.0 / 25.0	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	21.2 / 55.3	44.4 / 44.4	29.2 / 50.2	44.4 / 44.4	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	36.2 / 46.8	30.6 / 44.4	35.5 / 45	40.0 / 36.0	34.9 / 39.7	41.4 / 34.5	36.2 / 46.8	30.6 / 44.4	35.5 / 45	40.0 / 36.0	34.9 / 39.7	41.4 / 34.5	35.5 / 45	44.4 / 44.4	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	29.7 / 62.5	26 / 64.7	26 / 64.7	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	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	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	29.8 / 61.7	27.8 / 58.3	26.3 / 67	31.0 / 69.0	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 / 61.3	21 / 69.5	16.0 / 84.0	17.2 / 75.0	25.0 / 64.3	19.1 / 72.3	27.8 / 61.3	21 / 69.5	16.0 / 84.0	17.2 / 75.0	27.8 / 61.3	21 / 69.5	25.0 / 64.3	29.2 / 54.2
Location for High Tech	46.2 / 30.8	28.0 / 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												

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

	Allegany	Ache	Deale	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 / 3.2	3.9 / 3.2
Driving Time to Business	3.6 / 2.9	3.6 / 2.7	3.7 / 3.6	3.9 / 3.7	3.8 / 3.2	3.8 / 3.0	3.8 / 3.3	3.8 / 3.2	3.8 / 3.2	4.0 / 3.3	3.8 / 3.3
Mobile Phone Service	3.6 / 2.8	3.5 / 2.5	3.7 / 2.9	3.4 / 3.6	3.9 / 2.7	3.8 / 2.2	3.5 / 3.0	3.9 / 2.8	3.7 / 2.8	3.9 / 3.0	3.8 / 2.8
High Speed Internet Connectivity	3.8 / 3.1	4.1 / 2.6	3.8 / 3.2	3.9 / 3.8	4.0 / 3.1	3.8 / 2.4	3.9 / 3.1	3.9 / 3.0	3.9 / 3.1	3.8 / 3.2	3.9 / 3.0
Job Availability	4.5 / 1.5	4.6 / 1.7	4.4 / 2.3	4.6 / 2.6	4.7 / 1.6	4.6 / 1.8	4.7 / 1.7	4.6 / 2.1	4.6 / 1.9	4.9 / 1.9	4.6 / 1.9
Career Advancement Opportunities	4.3 / 1.4	4.4 / 1.8	4.3 / 2.3	4.5 / 2.7	4.6 / 1.8	4.5 / 1.8	4.6 / 1.8	4.3 / 2.0	4.5 / 2.0	4.9 / 2.0	4.5 / 2.0
High Paying Jobs	4.1 / 1.3	4.4 / 1.5	4.3 / 2.1	4.4 / 2.5	4.5 / 1.5	4.4 / 1.7	4.5 / 1.7	4.4 / 1.8	4.4 / 1.8	4.6 / 1.9	4.5 / 1.8
Equal Opportunity Based on Gender / Race	4.1 / 2.9	4.2 / 2.9	4.2 / 3.1	4.1 / 3.1	4.3 / 2.7	4.1 / 2.7	4.4 / 2.7	4.1 / 2.9	4.2 / 2.9	4.5 / 3.2	4.1 / 2.9
Image of City as a Place to Live	4.1 / 2.4	3.8 / 3.3	3.9 / 3.5	4.1 / 3.1	4.2 / 2.4	3.9 / 2.9	4.0 / 3.3	3.8 / 2.9	4.0 / 3.0	4.1 / 3.3	3.9 / 3.1
Effective Government Leadership	4.7 / 2.9	4.5 / 2.7	4.6 / 3.0	4.6 / 3.1	4.6 / 2.4	4.6 / 2.3	4.6 / 2.7	4.6 / 2.3	4.6 / 2.7	4.6 / 3.0	4.5 / 2.6
Strong Business Growth	4.4 / 1.9	4.4 / 2.0	4.2 / 2.6	4.5 / 2.6	4.6 / 1.6	4.3 / 1.8	4.5 / 1.8	4.5 / 1.8	4.4 / 2.1	4.5 / 2.1	4.4 / 2.1
Location for High Tech Activity	4.0 / 2.5	4.1 / 2.2	3.7 / 2.3	4.2 / 2.8	4.1 / 1.9	3.7 / 1.8	4.1 / 2.1	4.1 / 1.9	4.0 / 2.2	3.8 / 2.1	4.0 / 2.0
AVERAGE RATING FOR ALL FACTORS	4.2 / 2.7	4.1 / 2.7	4.1 / 3.0	4.2 / 3.4	4.3 / 2.6	4.1 / 2.5	4.3 / 2.9	4.2 / 2.7	4.2 / 2.9	4.3 / 2.9	4.2 / 2.8
Survey Respondents	77	108	227	83	169	92	208	112	1077	31	314

Residents: % Important

% of Respondents that rate factor as Important

% Somewhat Important / % Very Important

	Alleghany	Ashe	Bevise	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	18.2 / 81.8	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

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

