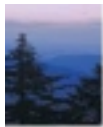


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT Analysis

Stokes County

July 2003

SWOT Outline

I. SWOT Analysis

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

II. Factors

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

III. Appendix: Survey Summary and Results

Stokes County SWOT Analysis

July 2003



AngelouEconomics is pleased to present the Stokes 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.

Angelos Angelou, Principal
Amy Holloway, Vice President for Economic Development
Chris Engle, Vice President and Senior Analyst
Sean Garretson, Project Manager
Travis Warziniack, Research Manager

AngelouEconomics

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 *Stokes 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.

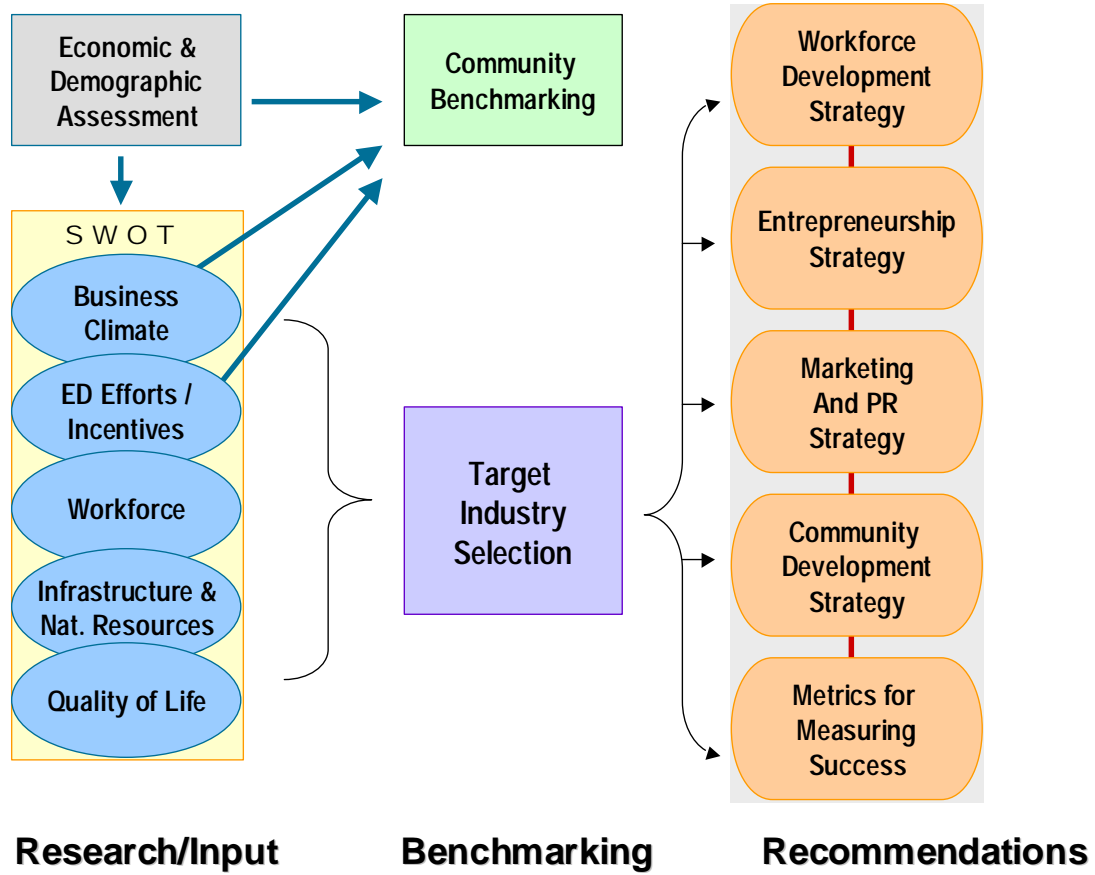
The *SWOT Analysis*, Report Two, takes the investigation of Stokes County's economic conditions one step further. First, it incorporates the *perceptions* of the county that the consulting team gathered during its interviews, focus groups, county tours, and on-line survey. It also considers how closely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

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

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

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

Project Process Diagram



SWOT Analysis Overview

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

- 1. Factor 1: Business Climate:** Capacity of public sector to support business expansion and development opportunities. Topics explored include: tax rates, regulatory climate, business expansion/development support, communication and collaboration and specific activities, and climate for entrepreneurship.
- 2. Factor 2: Workforce & Education:** Programs and delivery of services by organizations and institutions involved in workforce development and education including K-12 education, community colleges, universities, and workforce development boards/organizations. Topics explored include: educational attainment; communication and collaboration between workforce/education organizations, economic development organizations, and the private sector; resource allocation; and effectiveness of delivery of services.
- 3. Factor 3: Infrastructure:** County and regional infrastructure, as well as site-specific infrastructure to support business expansion and development. Topics explored include: transportation (roads, rail, air), utilities (water, wastewater, electricity and gas), telecommunications, land and real estate, and business parks.
- 4. Factor 4: Quality of Life:** Issues that influence an existing or potential resident to reside or a company to expand or relocate in a particular area. Topics explored include: cultural and entertainment options, recreational amenities, safety, 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 Stokes 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 – Stokes County's current state does not meet the needs of existing and future businesses and their workers.

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

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

Key Findings

The SWOT Analysis represents perceptions of Stokes 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.

Stokes 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>K-12 Education</i>	<i>Climate</i>	<i>University</i>
2 <i>Effective Government Leadership</i>	<i>Family Environment</i>	<i>Location for High Tech</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Strong Economic Growth</i>
4 <i>Family Environment</i>	<i>Good Value Housing</i>	<i>R&D Resources</i>
5 <i>Strong Economic Growth</i>	<i>Cost of Living</i>	<i>Mobile Phone Service</i>

Stokes 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>Family Environment</i>	<i>High Paying Jobs</i>
2 <i>Low Crime</i>	<i>Climate</i>	<i>University</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Location for High Tech Activity</i>
4 <i>Effective Government Leadership</i>	<i>Good Value Housing</i>	<i>Career Advancement Opportunities</i>
5 <i>Cost of Living</i>	<i>Cost of Living</i>	<i>Job Availability</i>

While more than 70 people participated in focus groups, the on-line survey provided an opportunity for all residents of Stokes County to provide their thoughts on economic development issues. In total, 92 residents and 29 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 above.

The survey results pinpoint specific areas of strengths and challenges within Stokes County. On a broader level, the consulting team has identified three issues that will influence the county's future economic development activities:

- Stokes County's identity as a suburban residential area versus business location
- Division between various geographic parts of the county
- Determining how to invest limited county and city funds back into the community

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

Factor 1: Business Climate and Entrepreneurship Development

Definition

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

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

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

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

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

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

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

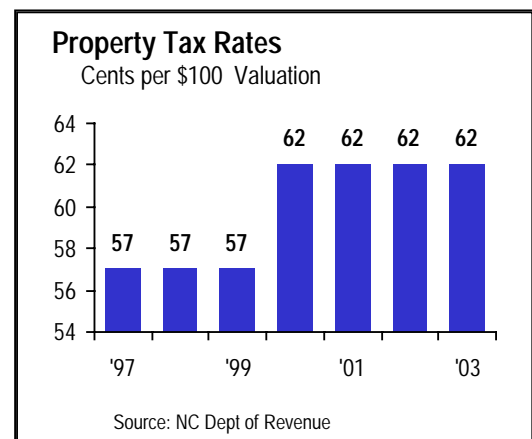
Stokes County's Ratings

Tax burden

Stokes County enjoys a relatively low property tax burden and has been able to maintain its county rate relatively constant over the years (\$0.62). King has the highest city rate in the county, but the average city/county rate still falls significantly lower than other counties in the 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>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, leading to the loss of some retail spending in northern counties to establishments across the state line. Low property tax rates and high corporate income tax rates are generally conducive to an economy based in capital-intensive manufacturing. Without considering the effect of incentives, Stokes County's tax burden should still be considered attractive to these types of industries.



Regulatory Climate

Stokes County lacks a countywide land use plan and has been following a voluntary agricultural use study as a guideline for planning. A land use plan that considers future population and economic growth trends could answer many of the county’s internal questions about where to place future infrastructure, business, and residential developments. It could also provide the county with a plan for a scenic road system and hike and bike trails. A countywide utilities plan could follow along after the completion of the land use plan.

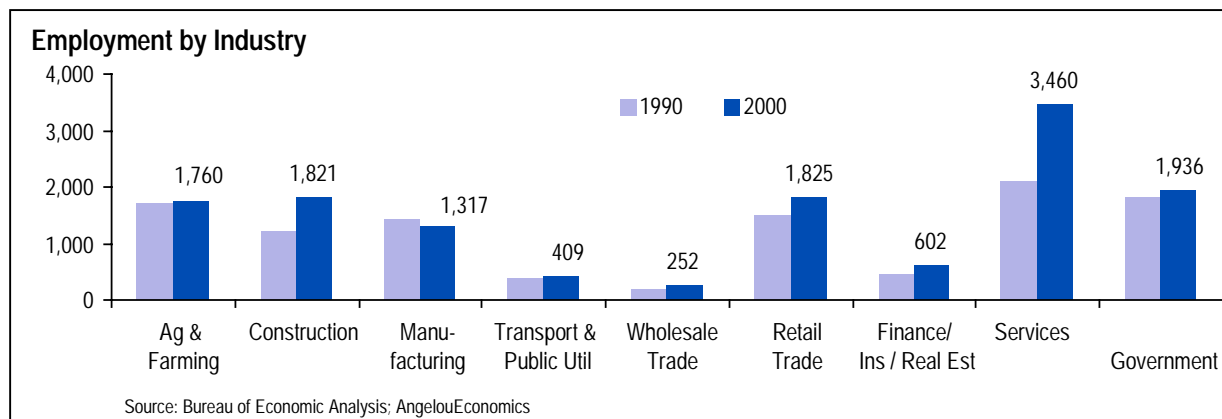
While Stokes County has zoning ordinances in place, many respondents to the survey requested “better enforcement of ordinances to bring existing properties up to code,” as well as tougher countywide zoning that preserves the natural environment and prevents sprawl. This is critical because many of Stokes’ possible target industries, such as tourism and arts/design-oriented businesses, will thrive only if the county maintains its air quality and scenic beauty.

For businesses or residential developers locating in Stokes, the permitting process is relatively simple and fast. Public officials are easily accessible and permitting fees are low.

Industry Growth

Although Stokes County has suffered manufacturing job losses in recent years, jobs have been gained in the service sector (more than double since 1990), retail trade, and construction sectors. Several new investments are on the short-term horizon. Parks & Woolson Machine Co., Inc., currently headquartered in Vermont, recently announced that it is opening a new operation in the McDonald Building at the Stokes County Business Park in King. The company is expected to create 30 new jobs over the next three years. In addition, North Carolina Baptist Hospital’s prospective \$30 million new facility could become an engine for future economic growth, creating a market for clinics and medical support businesses.

Stokes is in a good location for capturing some of Forsyth County’s future growth. It also has an opportunity for small business growth in sectors that are severely lacking – retail, restaurants, hotels, and entertainment venues. These businesses could emerge both in the southern portion of the county to serve the growing residential population and in the northern portion of the county to support extended visits from the more than 400,000 tourists coming to the county each year. Expanding the existing tourism industry into agriculture-related areas, such as agricultural heritage tours and viticulture, is another opportunity that complements efforts occurring in neighboring counties.



Should transportation and other infrastructure upgrades occur, Stokes could also be well situated for capturing businesses associated with the future FedEx hub in Greensboro.

Location

Stokes County's location is a strength, particularly for residents and businesses located in the southern portion of the county. The driving distance to Greensboro and Winston-Salem is minimal, cited one business owner, making it easy for some residents to access shopping and dining amenities, and for businesses to be connected to customers and suppliers. Stokes's proximity to Greensboro is also ideal for travelers – Stokes residents are a quick drive away from an international airport. Much-needed improvements in county roadways would make surrounding urban amenities much more accessible for all of Stokes County residents.

Entrepreneurial Climate

Strong entrepreneurial climates typically contain excellent telecommunications infrastructure, access to capital, a young workforce, and close proximity to colleges, universities, and research and development activities. Stokes County has many characteristics that could be attractive to entrepreneurs. In fact, eighty-three percent of Stokes businesses employ fewer than 10 people – around 5 percent higher than surrounding counties.

Home-grown businesses could be the future for Stokes County business growth. With its proximity to Winston-Salem, Stokes has access to tremendous university and research and development resources. Combined with the young professional influx in Winston-Salem, Stokes is among the youngest counties in the 8-county CEDS area – primarily because of new residential development in the King area.

Stokes faces two weaknesses within its entrepreneurial climate. First, telecommunications infrastructure is poor in some areas of the county. High speed Internet would enable more businesses to startup, operate, and sell products out of their homes. Second, residents lack knowledge about how to start a business or that entrepreneurship is a career option. Many of the industries that are desperately needed in Stokes County (retail, restaurants, and lodging) could be launched by residents if they had access to entrepreneurship education resources.

Incentives

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

Most competitive incentives in the southeastern U.S. are cash- or grant-based, of which little is available in North Carolina at the state or local level. Although the State of North Carolina does not allow counties to give economic incentives in the form of property tax abatements, certain measures can be taken by the county to enhance its attractiveness to relocating companies. Counties may, for example, invest in business parks and "shovel-ready" sites that provide adequate infrastructure to meet the needs of target industries. They may also work together with local educators to customize training programs to better

prepare local workers for target businesses. These two examples are popular alternatives to cash grants and tax abatements.

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

Factor 2: Workforce & Education

Definition

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

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

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

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

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

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

Stokes County's Ratings

K-12 Education

Varied perceptions of Stokes' K-12 educational system were conveyed in the survey and focus groups. Many residents believe that Stokes' schools under perform and have high dropout rates. In reality, the drop out rate in Stokes (6.9%) is very close to that in neighboring Surry (5.9%) and Forsyth (6.7%) Counties. The U.S. average is 11.2%.

SAT scores, another indicator of performance, are lower than in surrounding communities. Stokes (948) is slightly lower than Rockingham (954) and Surry (998). The State average is 998 and the U.S. average is 1020. The lower average overall for the state could be a reflection of the large number of students taking the exam: North Carolina ranks 13th in the U.S. for highest percentage of students taking the SAT.

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

On a psychological level, the perception of Stokes schools' performance could be a result of several factors. First, it could be blurred with the educational attainment of the general population – 26.8% of Stokes residents do not have a high school diploma. Second, it may be a function of an overall community impression that families do not place enough emphasis on education. Finally, as many local employers have noted, high school graduates are not equipped with the basic life skills that they need. From a business perspective, the second two arguments are ones heard in almost every community across the country, and do not seem to be affecting Stokes any greater than in other places.

Perhaps the misperception of the quality of Stokes schools has to do with their appearance. Several facilities in the county are in disrepair or using temporary buildings to alleviate swelling classrooms. Stokes has an opportunity to position itself as a first class suburban location for residents and small businesses. For this to happen, first-rate school facilities (buildings and equipment) are a necessity. Recently, county leaders cast a strong vote in support of local schools – county commissioners finalized The Stokes County Schools portion of the budget, granting all of the schools' requests for funding plus an additional \$200,000.

Higher Education and Workforce Training

Stokes County is the only county with a population of over 35,000 that does not have a university or community college. Twenty-five smaller counties in the state have community college satellites. This is the number one complaint expressed during the public input phase of this project. "I would like to see a satellite location of Forsyth Tech in King," stated one business in the survey. While an argument may wage over the exact location of a community college, the most important issue is that the county needs one, and needs it established quickly. **A community college campus is the most critical asset missing in Stokes County. It is directly and intricately linked with the ability of Stokes County to revive its economy.**

A workforce training effort has been in place at local high schools. Across the region, Forsyth Tech currently offers 69 associate degrees programs, but none are available in Stokes County. The college offers customized training courses (for individual employers) in 40 different locations across the county, yet the general public has access to only 5-6 locations for classes, including a two-classroom facility located in the courthouse building in Danbury. This is a logistical nightmare for residents and is hardest on the people in most need of workforce training. While a program is in place to provide training funds, these individuals may lack transportation for commuting between multiple campuses, or may only be free to take courses in the evening.

One concern of many residents is shortage of daycare facilities and its impact on participation in workforce development activities. With only a handful of daycares (only four in the county with a four- or five-star rating), Stokes County is severely underserved compared to Forsyth (30 with four- or five-star ratings) and Rockingham (18). One estimate is that the unmet demand for daycare totals 600 children. The lack of daycare options impacts the willingness of Stokes workers to accept a job or engage in workforce development programs. The areas most underserved by day cares are also the ones where workforce training is most needed.

Labor Pool

Survey respondents and focus group participants all describe Stokes County's workforce as being hard working, ethical, and loyal. Many Stokes residents' families have lived in the county for generations,

increasing their commitment to stay in the county no matter the level of employment opportunities. For companies, Stokes' workforce is affordable and does not demand the higher incomes found in larger nearby counties. Stokes' per capita income in 2000 was \$18,100 while Forsyth's was \$23,000. The region as a whole is still much less expensive than the Charlotte and Raleigh-Durham areas, where per capita incomes are around \$27,000 annually.

The county contains a base of skilled craftsmen, machinists, and technicians. Stokes is also becoming a preferred location for artists who want to leave the big city environment but stay active in the arts community (locally, in Winston-Salem, and across the state.) Residents in the more suburban neighborhoods bordering Forsyth County are well educated, many of them working in the financial and health care sectors.

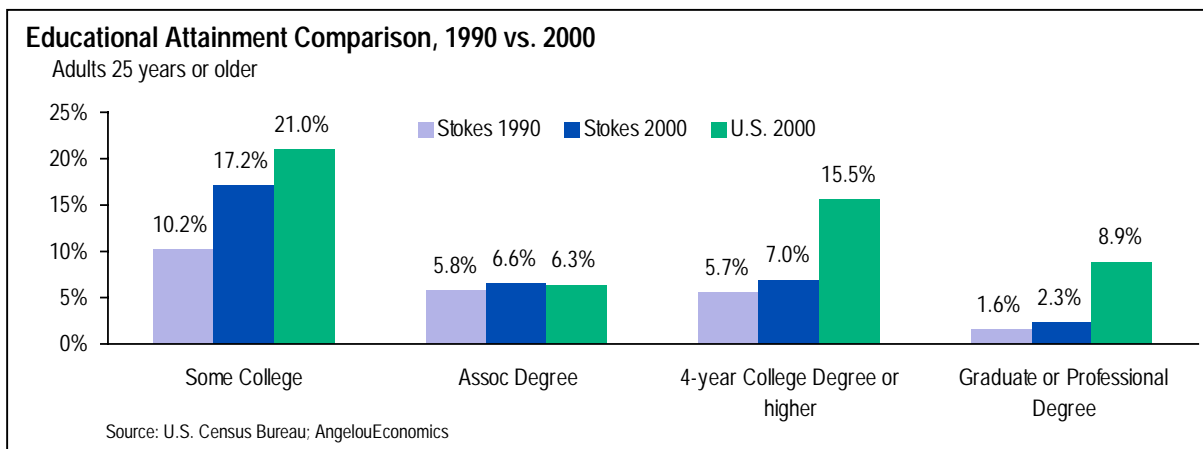
Stokes County now has the opportunity to utilize this growing pool of young educated labor and the challenge of retaining them. Over 31 percent of Stokes residents fall within the ages of 25 and 44, a larger percentage than any other county in the CEDS region. Promoting Stokes as a young vibrant community and tying this demographic into local events will be key in future economic growth.

The county average unemployment rate for 2002 was 6.1 percent, just above the national average of 5.8 percent but below the state average of 6.7 percent. The relatively low rate is reflective of the suburban nature of the community, particularly in the southern portion of the county where many residents have a large area in which to search for work. Additionally, 22.4% of workforce is considered "professional," a group less apt to lose their jobs in this recent economic downturn.

The diversity of workers in Stokes presents the county with an opportunity for encouraging entrepreneurial ventures and home-based businesses. It also highlights a pressing need to improve access within the county to workforce development training and postsecondary education.

Educational Attainment Levels

Though improving, the percentage of Stokes County population with a college degree or higher is still almost half that of the U.S. average. The county is stronger in its percentage of residents with some college education (17.2%). This population segment has dramatically increased since 1990 – likely attributed to the influx of second homeowners into the county and layoffs forcing a return to training programs. A community college campus in Stokes could boost up this percentage to meet the U.S. average.



These numbers do not illustrate the percentage of Stokes residents without a high school degree. At 27%, Stokes County has a lower portion of non-graduates than Rockingham (31%) and Surry (33%). On this front, the entire region does not fare well when compared against the U.S. – 17% of the adult population nationwide does not have a high school degree.

Factor 3: Infrastructure and Land Use

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

Land – The costs and availability of commercial and industrial land

Transportation infrastructure – City and county transportation infrastructure, including roads, airports, and rail infrastructure.

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

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

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

Stokes County's Ratings

Land

Stokes is home to three distinct geographic regions: the mountains, the scenic countryside, and the residential/city areas. The county contains ample land for development, but poor infrastructure to support it.

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>	Moderate
<i>Utilities</i>	Low
<i>Available buildings / sites</i>	Low

Roadway and utility infrastructure drive land use within the county. King, for example, has the best highway access in the county, but very few inexpensive, open tracts of land available for business use. Cost per acre on business sites in King are more than twice that of neighboring cities. A 150-acre plot will be available next door to the future hospital site, and with infrastructure upgrades could be a prime office park or community college location. Many areas of the county with good roadway access do not have water or sewer infrastructure.

Transportation Access

Another top concern voiced throughout the survey is Stokes County's transportation access. The county only has six miles of four-lane roads – a significant weakness. The connection of I-74 and I-73 through the southern part of the county (From US 311) is on the top of the county's wish list. This project is up for state funding, but is not expected to be on the agenda for many years to come.

Widening Highway 8 was another concern of survey participants. One individual voiced a safety concern; the lack of a shoulder makes it treacherous to drive beside the logging trucks and 18-wheelers frequently using the highway.

County leaders have lobbied the Department of Transportation and state officials for roadway improvements for years with no impact. Stokes has not had a major roadway project in the past 30 years.

Telecommunications

The county needs better mobile phone service and high speed Internet access in most areas, particularly in the rural areas. Only 54% of Stokes' residences have high speed Internet access.

Telephone service is offered by three providers: Alltel, Sprint, and Surry Telephone Membership Corporation. Businesses and residents responding to the survey complained of the numerous telephone books within the county and the long-distance charges placed on phone calls between neighboring cities. They also expressed an interest in increasing the coverage of mobile phones. The issue of mobile phone coverage is tied to the placement of towers – several communities have limited space for towers due to the desire to maintain scenic views within local parks.

Utilities

The county lacks water and sewer capacities, especially to prime economic development locations and key intersections. King and Walnut Cove are currently the only areas in the county with water, sewer, and natural gas. The southern portion of the county, in fact, has excess water and sewer capacity while cities further north are experiencing shortages. Because land in some of those areas will not perk, a sewage system is required to support business growth.

An opportunity that County leaders are examining is connecting cities with a single sewage system. The county could consider creating a countywide land use strategy in combination with a long-term utilities plan. Before investing in expensive utility infrastructure, the County must first envision how and where development will occur over the next 20 years and beyond.

Available Buildings and Sites

Stokes County has a limited amount of sites ready for business development. The Stokes County EDC, for example, owns one-half of the 20-acre Stokes County Business Park. It recently leased a portion of the McDonald building to Parks & Woolson. In addition to the Stokes County Business Park, the county contains approximately 600 acres of property zoned light industrial and heavy manufacturing. These sites are located in King, Walnut Cove, and Pine Hall. The largest site currently available for development, the Klutz Site, is zoned for residential and agricultural uses.

In addition, Stokes is home to numerous historic buildings and sites, several areas within the National Register of Historic Districts. These buildings provide excellent opportunities for rehabilitation and adaptive reuse by new business start-ups, festival sites, accommodations, museums, and tourist attractions.

Factor 4: Quality of Life

Definition

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

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

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

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

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

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

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

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

Stokes County’s Ratings

Safety

On the survey, Stokes County residents ranked a low crime rate within the top five most important location factors and top five county strengths. According to participants in one of the focus groups, Stokes County is a safe location because “criminals get lost in the back roads.”

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

Survey and focus group participants were accurate in their perception of the county being a safe place to live and conduct business. Stokes County can boast a crime rate lower than any of its neighboring counties (23.5 crimes per 1,000 people) relative to Rockingham (39.1), Surry (37.4), and larger Forsyth County (72.2).

Commute Times

With a whopping 70 percent of Stokes residents commuting outside of county for work, commute times are longer than if more job opportunities were located locally. On average, Stokes County residents drive 31 minutes one-way to work. This is higher than surrounding counties of Surry (25 minutes) and Rockingham (26 minutes).

People	1990	2000
Working in Stokes	7,721	9,118
Live & work in Stokes	5,578	6,330
Live elsewhere & work in Stokes	2,143	2,788
% workforce commuting in	28%	31%
Live in Stokes & work elsewhere	13,144	15,379
% resident workers commuting out	70%	71%

Source: US Census Bureau

Retail Choice

With its close proximity to Winston-Salem and Greensboro, a number of Stokes residents living in the King area have commented on their appreciation of the convenience to a wide variety of retail. Within Stokes County itself, however, retail choice is weak. Many survey and focus group participants complained of having to drive 20 to 30 minutes to reach a grocery store – in some parts of the county, the drive is much longer. One focus group participant expressed her frustration at the limited selection in local retail, “I can’t buy a pair of nice name brand pantyhose in King for work.”

As mentioned in the Stokes County Community Assessment, retail sales in the county have increased 10% since 1997, indicating a strong promise for future growth in the sector. Retail tends to closely follow residential growth. As more people move to southern Stokes County, it is likely that new stores will spring up as well.

Health Care

Stokes is underserved by medical facilities, but its close proximity to Winston-Salem has offset this concern in the past. Stokes County medical facilities employ 3.8 physicians per 10,000 residents. This is significantly lower than any neighboring communities: Rockingham (10.7), Surry (14.5) and urban Forsyth County (37.3). This low percentage of physicians per capita is connected to the degree Stokes County residents utilize the high quality medical facilities in nearby Winston-Salem. The reliance on Winston-Salem healthcare is evidenced in the number of emergency room visits occurring in Stokes County. The University of North Carolina’s Sheps Center for Health Services Research shows that Stokes County ER visits are far lower than its neighbors. Annual visits to the emergency room per 1,000 Stokes County residents (177) is significantly lower than in surrounding counties: Rockingham (515), Surry (704), and Forsyth (399).

Several respondents praised the high quality of medical care available in the county. Due to poor transportation infrastructure, however, long driving times to medical facilities, particularly in emergency situations, are a point of frustration for some. As one resident stated, “We should not have to drive to neighboring counties to a hospital or have to travel on winding roads to get to Danbury.”

A new hospital in Stokes County could be on the horizon. In August 2003, the results of a Certificate of Need process will be announced. If the Certificate were to be granted, a \$25 million hospital would be constructed as an expansion of Stokes Medical Center Park located in King. The hospital could become an anchor for a larger health and wellness related complex. Located next to and across the street from the

proposed hospital site are the Stokes YMCA and a dialysis clinic branch of Baptist Hospital. In the future, workforce development, education, day care facilities, and other health-related businesses could potentially locate on the remaining acreage. This vision ties into the target industries that will be recommended in the next phase of this project.

Community Image

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

Community image starts at home. Is the appearance of Stokes County one of energy and prosperity or one of struggle? The image of Stokes as a naturally beautiful county is well defined. People from across the state and U.S. visit the county each year to visit its parks or recreate along the Dan River. Stokes is the only county in the U.S. to contain its own mountain range. Artists and musicians moving to the county have added to its unique character. As mentioned earlier, a well-designed land use plan will help the county manage growth and ensure that future development does not compromise its environmental health.

The county is faced with an opportunity to build upon this image by investing in its towns. Stokes' cities contain beautiful architecture and history, but buildings are vacant. The revitalization of downtown King and enhancing the tourism-related resources of smaller communities will give a boost to community pride. Greater investment in urban infrastructure will improve entertainment options and make Stokes more appealing to businesses and residents. Beautiful cities are inviting atmospheres that keep residents living close by and reduce sprawl.

Diversity of Housing Stock

A variety of homes are available in Stokes County. The quality of new home construction in the King area is high. Residents also have options to buy older, more historic homes in other parts of the county. The county may, in fact, be skewed to having a greater availability of low-priced homes. Of homeowners, only 12 percent pay more than 30 percent of their monthly income for their mortgage. A high percentage of homes in the county – 30% - are mobile homes. This is a much higher concentration than in neighboring Rockingham (19%) and Surry (25%).

Entertainment

The quality of entertainment in Stokes depends on whom you ask. Stokes County is the Triad's Playground, noted one businessperson. For outdoor and sports enthusiasts, the county is a haven. The new YMCA is a great asset for the county. Hanging Rock State Park is one of the five most visited parks in North Carolina. In 2002, it attracted more than 400,000 people to Stokes County. In total, 700,000 tourists go to Stokes per year. With the mountains, the Dan River, excellent hiking, biking and other outdoor recreation, Moratock Park in Danbury, Fowler Park in Walnut Cove, Nature Central Park on Kirby Drive, Germanton Park, the year-round outdoor recreation industry could be a great foundation for tourism and economic development alike.

Stokes County's active arts council is another strength, with events like Pickin' on the Porch, Farmer's Appreciation Day in March, Stokes County Fair, the Stokes Stomp in September, and the King Chamber of

Commerce's Annual KingFest. Historical Society events are also an entertainment asset, as are the activities of local churches. These events could be better promoted within the county. As one prior arts council director noted, many Stokes residents were joining the arts council in Winston-Salem because they didn't know Stokes had one.

The Stokes Farmer's Market is an important effort with potential to expand and become a well-attended community event. Its organizers have the opportunity to team with the arts council in adding local arts and crafts vendors or music to its weekly markets. With increased promotion of the Farmer's Market, it could become a draw for people from outside of the county. Together with the strong local grower's co-op, the Farmer's Market offers an excellent example of how agriculture is an essential part of tourism and economic development.

On the down side, even with arts and cultural events in Stokes County, per capita spending on recreation and parks, museums, libraries and arts in Stokes County was \$13 in 2001 – below neighboring counties (Rockingham is \$23 per capita; Surry is \$18; and Forsyth was \$49).

Many entertainment opportunities are left to be developed, including more nightlife activities, family-friendly restaurants, cinemas, and overnight accommodations, such as B&Bs, for tourists. Even outdoor activities could be better developed, such as extended hike and bike trails that better connect all corners of the county. And, as mentioned earlier, improved entertainment and recreation opportunities not only benefit Stokes County residents, but also enhance its attractiveness as a tourist destination.

Factor 5: Economic Development Efforts

Definition

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

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

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

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

Stokes County's Ratings

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

External Promotion

Stokes County has done very little to promote itself as a business location outside of the region. Economic development activities have largely consisted of promoting individual buildings and sites. For the most part, the promotion of Stokes’ business sites is the responsibility of commercial brokers and the Piedmont Triad Partnership. This is a direct result of the county’s limited budget for economic development.

Weak external promotion is also due to a lack of a unified image – as a suburban community, as a tourism destination, or as a center for jobs and business growth. Stokes’ ultimate image may be closely linked to activities in Forsyth County. In fact, several survey respondents expressed an interest in seeing Stokes County leaders working more closely with Winston-Salem economic development officials.

The county’s tourism resources are its best-promoted assets, particularly Hanging Rock State Park. As one survey respondent noted, more could be done to promote Stokes as the “wilderness behind the fence” to the Piedmont Triad. Better packaging and marketing Stokes’ natural and outdoor recreation resources to tourists could be a good starting point for future economic development promotion.

Internal Promotion

Success of economic development relies on internal communication. This is not purely a marketing role, but also a team effort to improve overall community development.

Focus group and survey participants described the division of the county into several separate geographic and socioeconomic realms. This situation has tended to divide internal communication in the county, with one "realm" perceiving that the other does not understand its perspective. As one business responding to the survey stated, the county "needs a team-based approach to regional development." A focus group participant pointed out that any economic development effort needs to be "countywide, otherwise people are going to get upset." Perhaps the first step to successful economic development will be improving communication across the entire county and acknowledging each geographic region's complementary attributes.

On the whole, Stokes County businesses and residents are not aware of many of the resources available to them in the county. Many people have pointed out the need for a single source of information about community events. Several residents have suggested that Community Resources, Information, and Referral system needs to be completed and operational as soon as possible. One even suggested that the Cooperative Extension be charged with keeping the system updated once it is on-line.

Great economic development initiatives often begin at the grassroots level. Stokes County has a history of very strong community volunteerism. A recent initiative to start a Volunteer Center, for example, could bring residents and businesses from across the county together to identify and solve endemic problems. Strong civic groups such as the Kiwanis and Rotary Clubs are also active in addressing local issues. They could jump-start initiatives that lead to small business growth, workforce training, and preservation of natural resources. These groups should be empowered to be engaged in future economic development.

Resource allocation

Resource allocation for economic development in Stokes County is low. With a net operating budget of \$85,000 for 2003-2004, the economic development organization has few funds available for promoting the county to businesses. Until the State allows the county to keep its ½ cent sales tax collections (2004 at the earliest), Stokes County Economic Development will require the involvement of other organizations to implement a business recruitment effort.

APPENDIX ONE: Stokes County Community Input

AngelouEconomics is pleased to present the results of the *Stokes 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 121 surveys completed for Stokes County. Of these, 29 responses were from corporations and 92 were from residents.

Summary of the Stokes County Results

Like most counties in the 8-county CEDS region, Stokes residents and companies place a high value on education, healthcare, and quality of life issues. Effective government leadership is also important to both groups. The top 5 factors that Stokes respondents rate highly are related to quality of life: climate, family environment, low crime, and cost of living/housing. Both residents and companies expressed a desire for more University resources and seem to desire improved high tech assets locally. Residents' concerns include job availability and career advancement opportunities.

Stokes 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>K-12 Education</i>	<i>Climate</i>	<i>University</i>
2 <i>Effective Government Leadership</i>	<i>Family Environment</i>	<i>Location for High Tech</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Strong Economic Growth</i>
4 <i>Family Environment</i>	<i>Good Value Housing</i>	<i>R&D Resources</i>
5 <i>Strong Economic Growth</i>	<i>Cost of Living</i>	<i>Mobile Phone Service</i>

Stokes 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>Family Environment</i>	<i>High Paying Jobs</i>
2 <i>Low Crime</i>	<i>Climate</i>	<i>University</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Location for High Tech Activity</i>
4 <i>Effective Government Leadership</i>	<i>Good Value Housing</i>	<i>Career Advancement Opportunities</i>
5 <i>Cost of Living</i>	<i>Cost of Living</i>	<i>Job Availability</i>

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

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

Residents

Rank by Importance / Local Condition

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

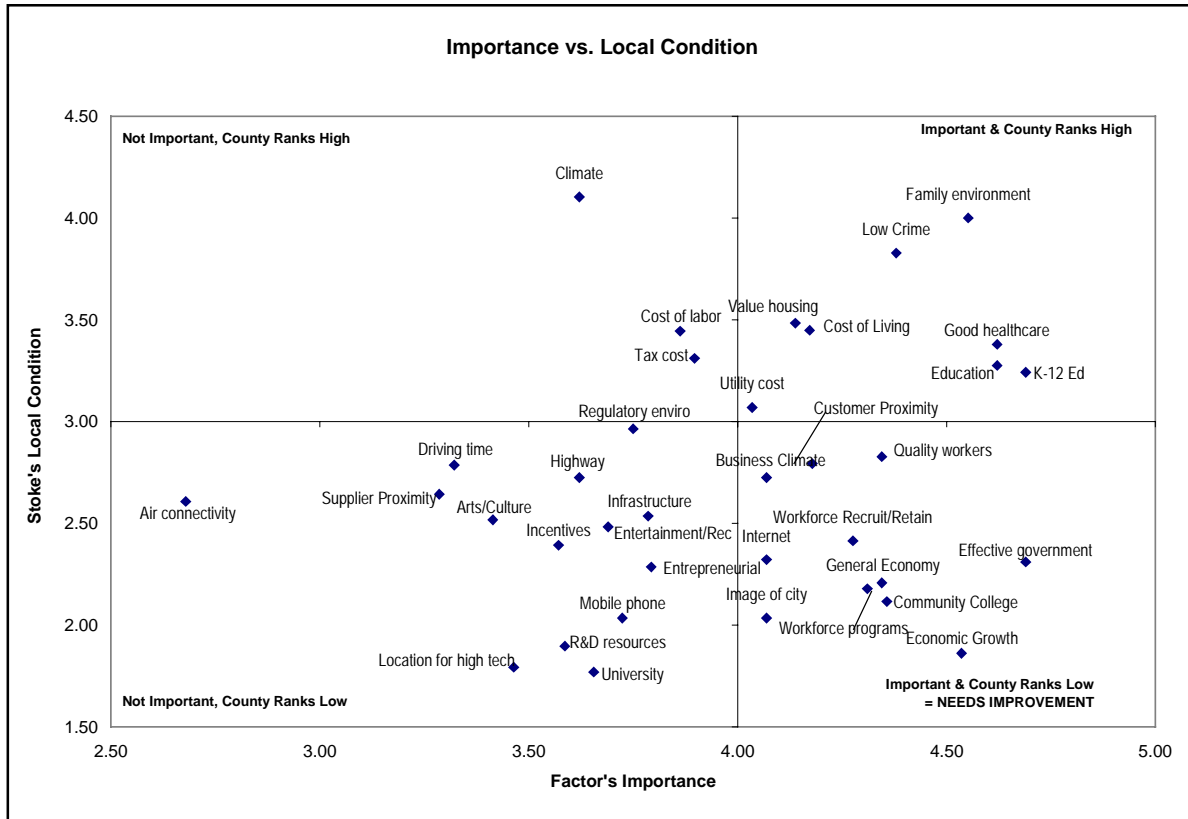
Companies

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

Looking at all factors, K-12 education is the most important factor to companies, but companies rank it about average locally. Companies would like to see more effective government leadership, and rate “community college” low, indicating the current lack of a campus. Stokes is generally perceived to be an affordable location: cost of living, good value housing, and cost of labor and utilities all rank above average. Mobile phone service is rated poor, but is ranked less important than Internet. Companies are satisfied with health care available in Stokes, but would like to see more from their workforce programs. Overall, companies expressed high levels of satisfaction with lifestyle factors, but desire more economic opportunities and support from government and workforce programs.



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

- "Better mobile phone service, better quality of roads"
- "Quality of life is excellent for outdoor recreation"
- "I would like to see the satellite location for Forsyth Tech in King"
- "Wilderness Behind the Fence"
- "The arts council needs to become fully funded"
- "Improved atmosphere for entrepreneurs"

Other comments include:

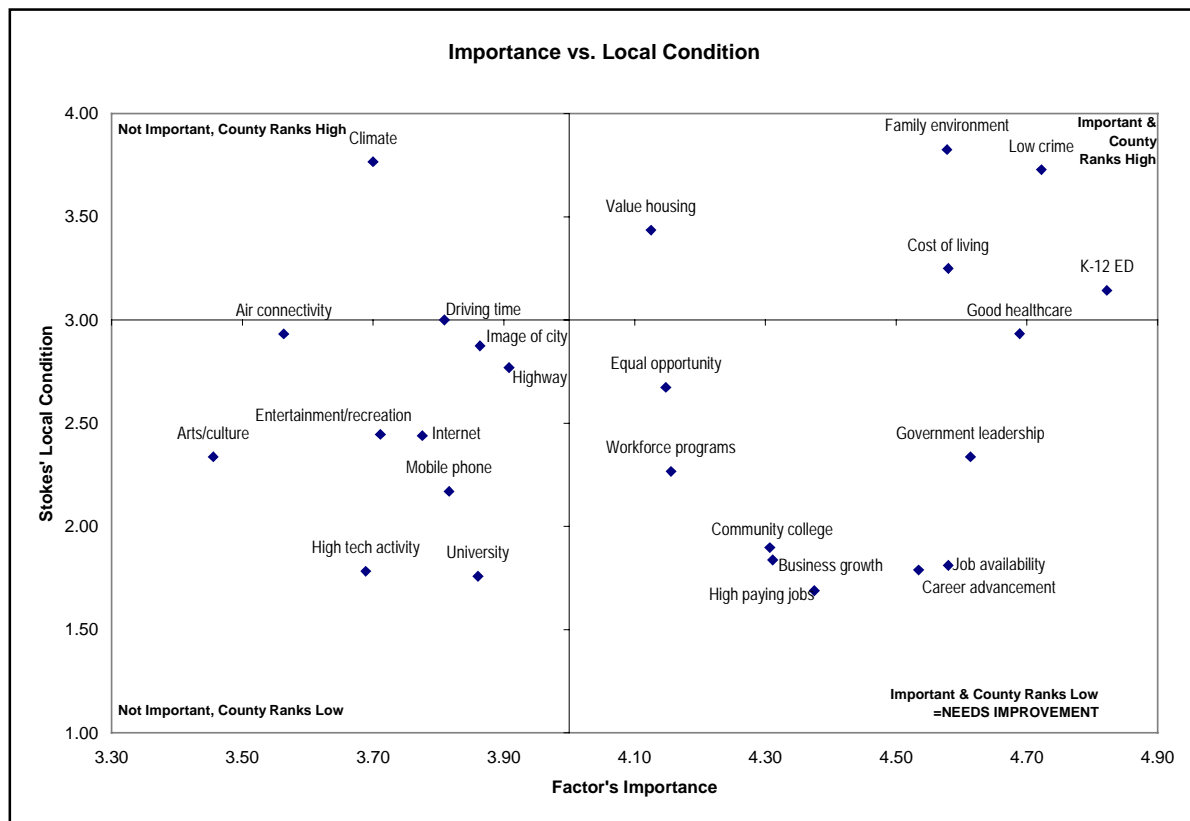
- "There must be more cooperative efforts in planning, economic development and concern about the future"
- "The beauty of this county is being eroded by the clearing of land and home construction"
- "We only have six miles of major highway in the entire county"

Residents

Residents were asked similar questions on importance and satisfaction:

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

As with companies, the most important factor for residents is K-12 education, and residents rank Stokes slightly above average. Likewise, the most important and successful factors are family environment and low crime. Job-related concerns were the top issues in need of improvement (job availability, business growth, high paying jobs, career advancement). Respondents were generally satisfied with Stokes’ physical resources (climate, housing) and image of the county, but expressed some concern over entertainment and cultural amenities (but still valued them less than job issues).



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

- "There is a huge need for resources involving the performing and fine arts"
- "Better communication and teamwork within local governments"
- "Business friendly environment"
- "County commissioners who care about the county"
- "Team based approach to regional development."
- "We need a cell phone tower in the Danbury area"

Other comments include:

- "We are still operating on a 18th century tax model"
- "The government powers must start thinking "outside the box""
- "A citizens corps needs to be available to assist with crisis"
- "Open a county wide recycling landfill"
- "We have many undeveloped resources in Stokes County"

Summary of the 8-County Regional Results

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

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

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

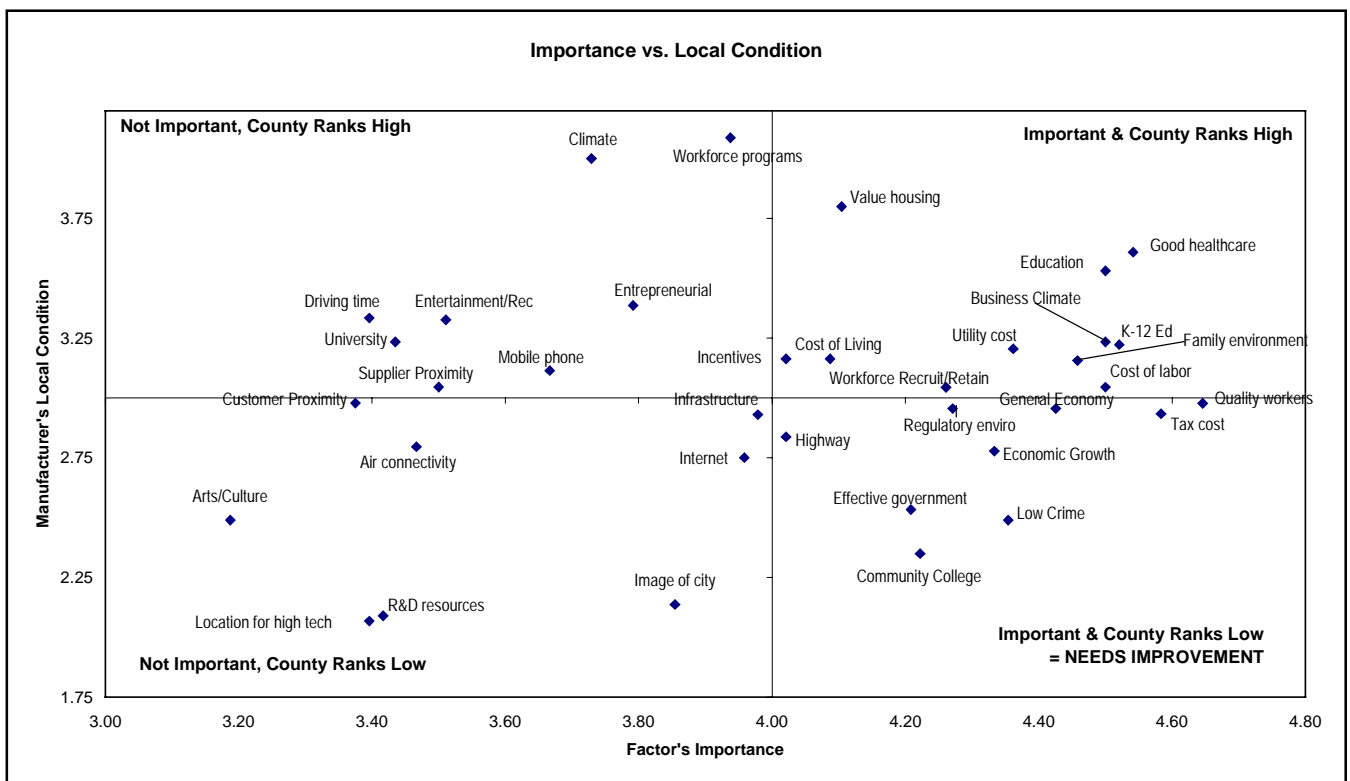
8-County Regional Summary: Residents		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>University</i>
2 <i>Low Crime</i>	<i>Local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

Manufacturers (Region-wide)

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

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

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



of taxes below-average.

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

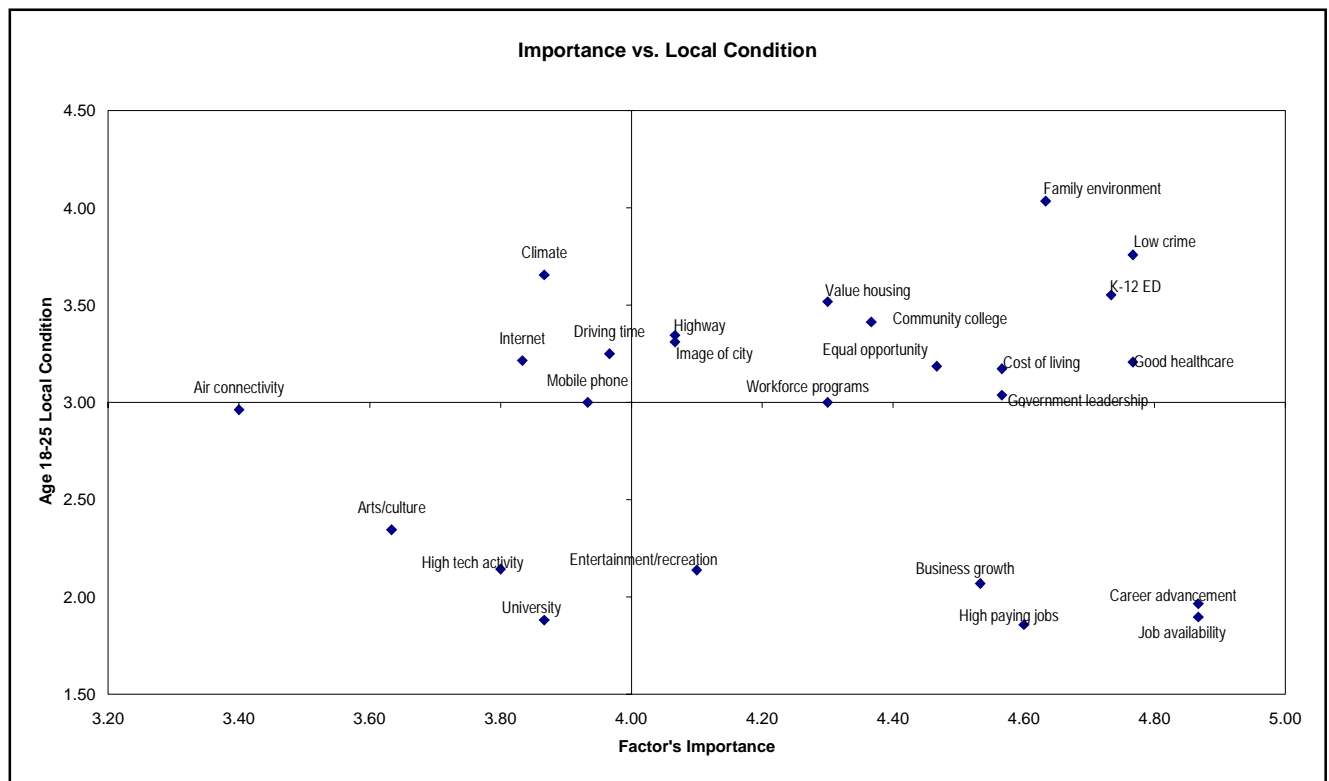
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our county"
- "The hope is that the decisions made today will improve the future for our county and the young people, which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

Other comments include:

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

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

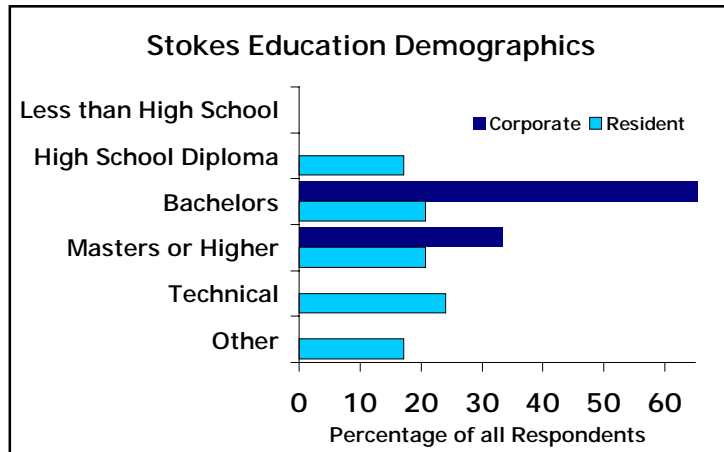
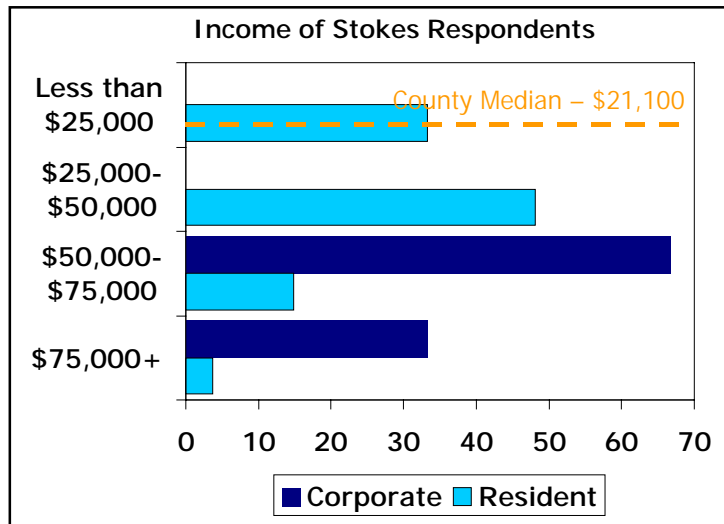
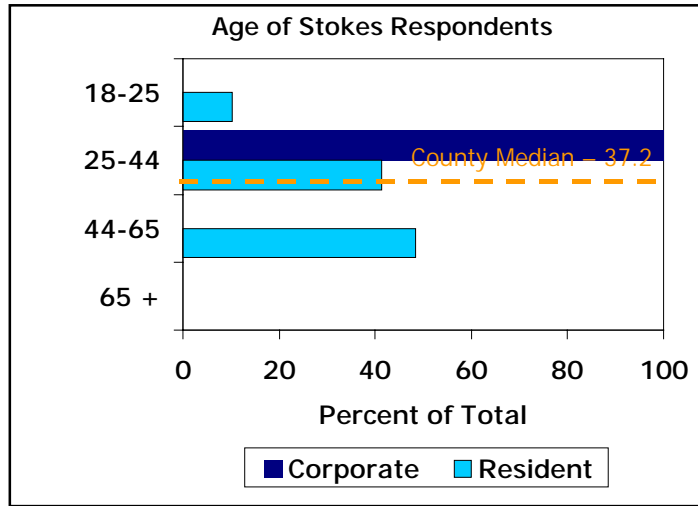
Not surprisingly, the region’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: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

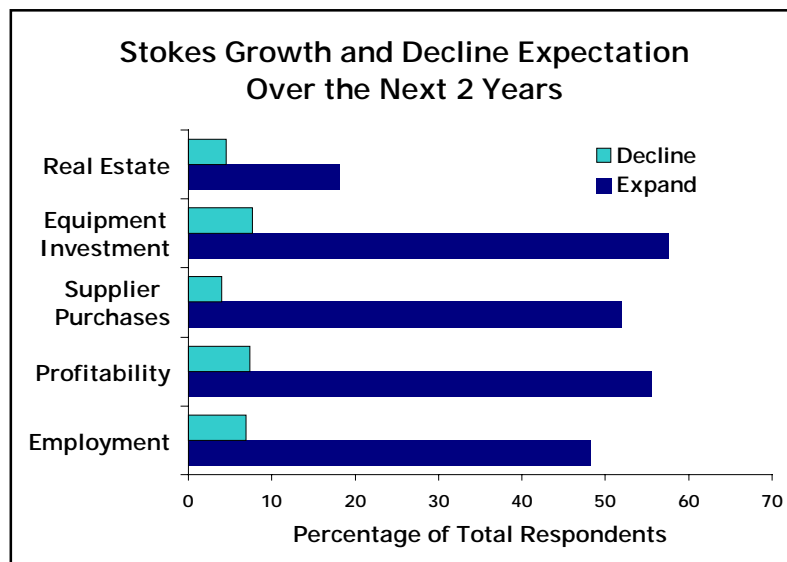
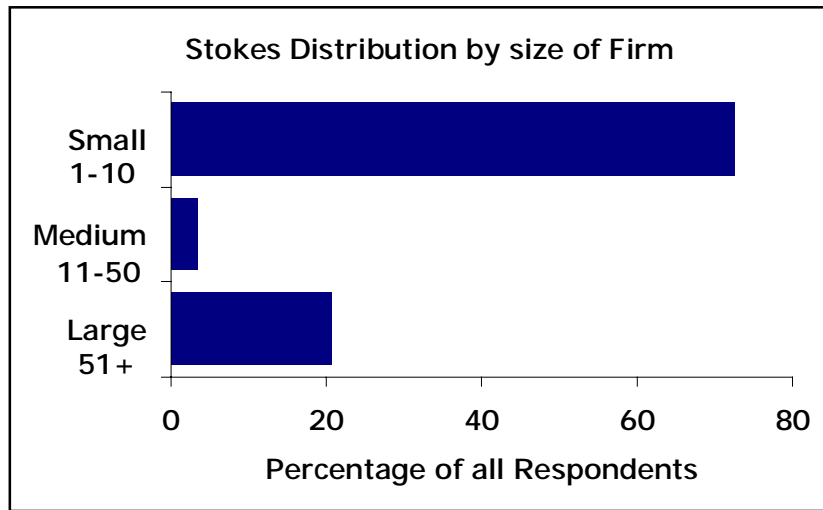
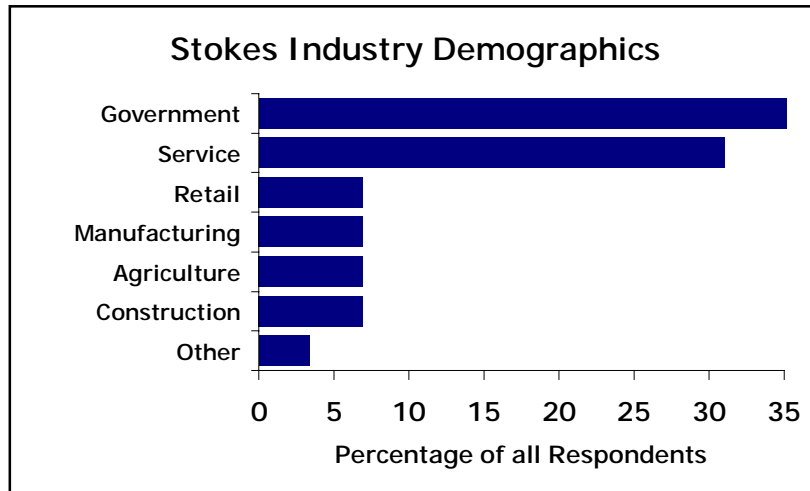


Respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

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

Demographic Profile of Stokes 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	Aches	Barle	Forsyth	Rockingham	Stokes	Burru	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	30.6 / 65.6	31.5 / 52.4	25 / 67.1	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	37.1 / 45.7	26.1 / 45.5	24.1 / 65.2	37.1 / 45.7	43.8 / 29.2
Workforce Recruitment / Retention	46.2 / 30.8	23.2 / 65.1	22.6 / 35.5	23.3 / 45.8	26.6 / 53.1	24.5 / 48.3	31.1 / 46.7	25.0 / 60.0	26 / 48.6	26.6 / 53.1	24.5 / 48.3	31.1 / 46.7	25.0 / 60.0	26 / 48.6	26.6 / 53.1	24.5 / 48.3	25.0 / 60.0	26 / 48.6	24.5 / 48.3	25.0 / 60.0	34.8 / 47.8
Cost of Living	53.8 / 20.1	21.7 / 58.0	26.7 / 40.0	32.0 / 44.0	37.5 / 48.4	34.5 / 41.4	31.1 / 48.9	19.4 / 62.8	29.9 / 48.2	37.5 / 48.4	34.5 / 41.4	31.1 / 48.9	19.4 / 62.8	29.9 / 48.2	37.5 / 48.4	34.5 / 41.4	29.9 / 48.2	37.5 / 48.4	34.5 / 41.4	19.4 / 62.8	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	30.6 / 27.8	31.8 / 30.6	34.5 / 20.7	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	19.4 / 30.6	26.5 / 25.6	37.9 / 17.2	14.9 / 25.5	12.5 / 16.7
Low Crime	23.1 / 61.5	14.3 / 80.0	22.6 / 61.3	28.0 / 52.0	25.0 / 65.6	31.0 / 65.2	25.5 / 61.7	22.2 / 69.4	22.9 / 66	25.0 / 65.6	31.0 / 65.2	25.5 / 61.7	22.2 / 69.4	22.9 / 66	25.0 / 65.6	31.0 / 65.2	22.2 / 69.4	22.9 / 66	31.0 / 65.2	25.5 / 61.7	27.1 / 54.2
Good Healthcare	23.1 / 76.9	12.9 / 84.3	29.0 / 61.3	36.0 / 60.0	31.2 / 65.6	31.0 / 65.5	31.9 / 68.1	16.7 / 72.2	25.4 / 70.5	31.2 / 65.6	31.0 / 65.5	31.9 / 68.1	16.7 / 72.2	25.4 / 70.5	31.2 / 65.6	31.0 / 65.5	16.7 / 72.2	25.4 / 70.5	31.0 / 65.5	31.9 / 68.1	27.1 / 64.6
Family Environment	23.1 / 69.2	12.7 / 80.3	19.4 / 61.3	24.0 / 60.0	26.6 / 64.1	31.0 / 62.1	19.1 / 74.5	19.4 / 63.9	20.9 / 68.7	26.6 / 64.1	31.0 / 62.1	19.1 / 74.5	19.4 / 63.9	20.9 / 68.7	26.6 / 64.1	31.0 / 62.1	19.4 / 63.9	20.9 / 68.7	31.0 / 62.1	19.1 / 74.5	20.8 / 62.5
Climate	38.5 / 7.7	29.4 / 29.6	32.3 / 25.8	36.0 / 40.0	26.6 / 26.6	31.0 / 20.7	21.3 / 40.4	38.9 / 27.8	32.2 / 29.1	26.6 / 26.6	31.0 / 20.7	21.3 / 40.4	38.9 / 27.8	32.2 / 29.1	26.6 / 26.6	31.0 / 20.7	38.9 / 27.8	32.2 / 29.1	31.0 / 20.7	21.3 / 40.4	18.8 / 33.3
Good Value Housing	53.8 / 30.8	33.8 / 62.1	48.4 / 32.3	40.0 / 32.0	33.3 / 46.0	41.4 / 37.9	48.9 / 36.2	41.2 / 38.2	40.3 / 41.2	33.3 / 46.0	41.4 / 37.9	48.9 / 36.2	41.2 / 38.2	40.3 / 41.2	33.3 / 46.0	41.4 / 37.9	41.2 / 38.2	40.3 / 41.2	41.4 / 37.9	48.9 / 36.2	37.5 / 37.5
Business Climate	30.8 / 61.5	16.9 / 69.0	45.2 / 51.6	24.0 / 68.0	23.4 / 67.2	31.0 / 44.8	27.7 / 70.2	25.0 / 66.7	26.9 / 64.2	23.4 / 67.2	31.0 / 44.8	27.7 / 70.2	25.0 / 66.7	26.9 / 64.2	23.4 / 67.2	31.0 / 44.8	25.0 / 66.7	26.9 / 64.2	31.0 / 44.8	27.7 / 70.2	25 / 66.7
Tax Cost	30.8 / 46.2	23.2 / 65.2	22.6 / 51.6	28.0 / 48.0	25.0 / 57.8	31.0 / 41.4	22.2 / 57.8	27.8 / 47.2	25.3 / 54.8	25.0 / 57.8	31.0 / 41.4	22.2 / 57.8	27.8 / 47.2	25.3 / 54.8	25.0 / 57.8	31.0 / 41.4	27.8 / 47.2	25.3 / 54.8	31.0 / 41.4	22.2 / 57.8	25 / 66.7
Regulatory Environment	30.8 / 38.5	24.6 / 43.5	30.0 / 33.3	48.0 / 32.0	28.1 / 42.2	28.6 / 32.1	37.0 / 41.3	36.1 / 30.6	31.5 / 38.3	28.1 / 42.2	28.6 / 32.1	37.0 / 41.3	36.1 / 30.6	31.5 / 38.3	28.1 / 42.2	28.6 / 32.1	36.1 / 30.6	31.5 / 38.3	28.6 / 32.1	37.0 / 41.3	27.1 / 50
State and Local Incentives / Assistance	15.4 / 30.8	24.6 / 39.1	16.1 / 29.0	16.0 / 36.0	28.1 / 35.9	35.7 / 28.6	31.9 / 31.9	36.1 / 30.6	26.8 / 33.9	28.1 / 35.9	35.7 / 28.6	31.9 / 31.9	36.1 / 30.6	26.8 / 33.9	28.1 / 35.9	35.7 / 28.6	36.1 / 30.6	26.8 / 33.9	35.7 / 28.6	31.9 / 31.9	35.4 / 37.5
Proximity to Customers	30.8 / 15.4	20.0 / 48.6	25.8 / 45.2	24.0 / 44.0	23.8 / 49.2	28.6 / 31.4	27.7 / 38.3	28.6 / 31.4	25 / 43.3	23.8 / 49.2	28.6 / 31.4	27.7 / 38.3	28.6 / 31.4	25 / 43.3	23.8 / 49.2	28.6 / 31.4	28.6 / 31.4	25 / 43.3	28.6 / 31.4	27.7 / 38.3	25 / 18.8
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	28.6 / 22.9	22.1 / 20.8	17.9 / 25.0	19.1 / 23.4	25 / 18.8
Availability of Quality Workers	46.2 / 53.8	23.9 / 64.8	26.7 / 56.7	32.0 / 56.0	32.8 / 50.0	31.0 / 58.6	23.4 / 61.7	33.3 / 58.3	29.2 / 58.1	32.8 / 50.0	31.0 / 58.6	23.4 / 61.7	33.3 / 58.3	29.2 / 58.1	32.8 / 50.0	31.0 / 58.6	33.3 / 58.3	29.2 / 58.1	31.0 / 58.6	23.4 / 61.7	27.1 / 68.8
Cost of Labor	46.2 / 38.5	21.0 / 47.9	35.5 / 41.9	36.0 / 44.0	29.7 / 43.8	24.1 / 41.4	32.6 / 43.6	33.3 / 41.7	32.1 / 42.8	29.7 / 43.8	24.1 / 41.4	32.6 / 43.6	33.3 / 41.7	32.1 / 42.8	29.7 / 43.8	24.1 / 41.4	33.3 / 41.7	32.1 / 42.8	31.0 / 58.6	23.4 / 61.7	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	41.7 / 33.3	33.4 / 37.9	40.3 / 35.5	40.4 / 38.3	41.7 / 33.3
Infrastructure	30.8 / 38.5	25.7 / 45.7	43.3 / 23.3	45.8 / 37.5	35.9 / 42.2	25.0 / 35.7	38.6 / 43.2	42.9 / 34.3	35.1 / 39.3	35.9 / 42.2	25.0 / 35.7	38.6 / 43.2	42.9 / 34.3	35.1 / 39.3	35.9 / 42.2	25.0 / 35.7	42.9 / 34.3	35.1 / 39.3	35.9 / 42.2	38.6 / 43.2	43.2 / 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	31.4 / 14.3	20.6 / 17.9	20.6 / 23.8	38.6 / 43.2	20 / 20
Highway	46.2 / 15.4	36.7 / 37.1	26.7 / 23.3	32.0 / 36.0	34.4 / 39.1	27.6 / 31.0	36.2 / 42.6	48.6 / 34.3	35.5 / 35.1	34.4 / 39.1	27.6 / 31.0	36.2 / 42.6	48.6 / 34.3	35.5 / 35.1	34.4 / 39.1	27.6 / 31.0	48.6 / 34.3	35.5 / 35.1	34.4 / 39.1	36.2 / 42.6	41.7 / 31.2
Driving Time to Business Destinations	38.5 / 7.7	24.3 / 22.9	36.7 / 10.0	44.0 / 20.0	32.8 / 25.0	21.4 / 14.3	36.2 / 23.4	33.3 / 27.8	34.2 / 21.1	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	33.3 / 27.8	34.2 / 21.1	32.8 / 25.0	36.2 / 23.4	29.2 / 12.5
Mobile Phone Service	38.5 / 38.5	38.0 / 43.7	29.0 / 22.6	40.0 / 20.0	32.3 / 46.8	31.0 / 31.0	29.8 / 38.3	50.0 / 25.0	35.7 / 36	40.0 / 20.0	32.3 / 46.8	31.0 / 31.0	29.8 / 38.3	50.0 / 25.0	35.7 / 36	40.0 / 20.0	50.0 / 25.0	35.7 / 36	40.0 / 20.0	32.3 / 46.8	27.1 / 25
High Speed Internet	46.2 / 38.5	25.4 / 67.7	36.7 / 30.0	40.0 / 48.0	21.9 / 54.7	24.1 / 48.3	21.2 / 55.3	44.4 / 44.4	29.2 / 50.2	40.0 / 48.0	21.9 / 54.7	24.1 / 48.3	21.2 / 55.3	44.4 / 44.4	29.2 / 50.2	40.0 / 48.0	44.4 / 44.4	29.2 / 50.2	40.0 / 48.0	21.9 / 54.7	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	30.6 / 44.4	35.5 / 45	40.0 / 36.0	34.9 / 39.7	31.9 / 53.2
General Economy	38.5 / 46.2	23.9 / 70.4	37.9 / 58.6	16.7 / 76.0	29.7 / 62.5	24.1 / 65.2	19.1 / 70.2	26.7 / 62.9	26 / 64.7	16.7 / 76.0	29.7 / 62.5	24.1 / 65.2	19.1 / 70.2	26.7 / 62.9	26 / 64.7	16.7 / 76.0	26.7 / 62.9	26 / 64.7	16.7 / 76.0	29.7 / 62.5	27.7 / 57.4
Image of City as a Place to do Business	23.1 / 53.8	24.3 / 57.1	40.0 / 33.3	20.0 / 72.0	18.8 / 64.1	31.0 / 44.8	25.5 / 48.9	25.0 / 41.7	25.2 / 53.2	20.0 / 72.0	18.8 / 64.1	31.0 / 44.8	25.5 / 48.9	25.0 / 41.7	25.2 / 53.2	20.0 / 72.0	25.0 / 41.7	25.2 / 53.2	20.0 / 72.0	18.8 / 64.1	27.1 / 33.3
Effective Government Leadership	38.5 / 61.5	22.5 / 70.4	36.7 / 53.3	12.0 / 80.0	23.4 / 73.4	31.0 / 69.0	29.8 / 61.7	27.8 / 58.3	26.3 / 67	12.0 / 80.0	23.4 / 73.4	31.0 / 69.0	29.8 / 61.7	27.8 / 58.3	26.3 / 67	31.0 / 69.0	27.8 / 58.3	26.3 / 67	31.0 / 69.0	29.8 / 61.7	37.5 / 45.8
Strong Economic Growth	15.4 / 46.2	16.9 / 74.6	35.5 / 54.8	16.0 / 84.0	17.2 / 75.0	25.0 / 64.3	19.1 / 72.3	27.8 / 61.3	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	27.8 / 61.3	21 / 69.5	16.0 / 84.0	17.2 / 75.0	29.2 / 54.2
Location for High Tech	46.2 / 30.8	29.0 / 33.3	30.0 / 10.0	24.0 / 52.0	31.2 / 39.1	35.7 / 14.3	31.9 / 36.2	37.1 / 34.3	31.8 / 32.5												

Residents: Rank of Factors
Rank of Average Scores

Importance / Local Condition

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

Residents: Average Score for All County Respondents

Average Score (1=Low, 5 = High)

Importance / Local Condition

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

Residents: % Important

% of Respondents that rate factor as Important

% Somewhat Important / % Very Important

	Allegheny	Ache	Davis	Forsyth	Rockingham	Stokes	Surry	Youthn	TOTAL	Residents 18-24	Residents 25-44
K-12 ED	1.3 / 97.4	6.5 / 91.5	6.2 / 93.8	13.3 / 81.9	5.4 / 94.6	4.4 / 91.1	4.3 / 95.9	7.2 / 92.8	5.9 / 97.7	6.7 / 93.3	6.1 / 93.6
University	17.6 / 82.4	25.5 / 74.5	27.1 / 72.9	30.5 / 69.5	27.2 / 72.8	25.6 / 74.4	24.9 / 75.1	29.1 / 70.9	26.2 / 73.8	23.3 / 76.7	26.1 / 73.9
Community College	27.6 / 72.4	29 / 71	34.5 / 65.5	39 / 61	21.8 / 78.2	28.4 / 71.6	17.1 / 82.9	37.5 / 62.5	28.2 / 71.8	43.3 / 56.7	29.7 / 70.3
Workforce Training Programs	32.9 / 67.1	28.7 / 71.3	38.5 / 61.5	32.1 / 67.9	22.9 / 77.1	34.4 / 65.6	25.6 / 74.4	40 / 60	31.5 / 68.5	33.3 / 66.7	40.1 / 59.9
Cost of Living	17.3 / 82.7	24.1 / 75.9	20.9 / 79.1	32.5 / 67.5	26.4 / 73.6	18.2 / 81.8	27.3 / 72.7	35.1 / 64.9	25.2 / 74.8	23.3 / 76.7	27.1 / 72.9
Entertainment / Recreation	28.9 / 71.1	23.6 / 76.4	33.0 / 67.0	33.7 / 66.3	35.2 / 64.8	22.2 / 77.8	35 / 65	36.9 / 63.1	32 / 68	23.3 / 76.7	35.5 / 64.5
Arts / Culture	40 / 60	27.1 / 72.9	26.5 / 73.5	39.8 / 60.2	36.5 / 63.5	24.4 / 75.6	31.2 / 68.8	24.1 / 75.9	30.6 / 69.4	6.7 / 93.3	26.8 / 73.2
Low Crime	19.7 / 80.3	11.1 / 88.9	13.7 / 86.3	18.1 / 81.9	15.5 / 84.5	14.4 / 85.6	15.9 / 84.1	19.6 / 80.4	15.6 / 84.4	23.3 / 76.7	17.3 / 82.7
Good Healthcare	19.7 / 80.3	12 / 88	16.8 / 83.2	23.2 / 76.8	19.2 / 80.8	22.2 / 77.8	15.5 / 84.5	25.9 / 74.1	18.5 / 81.5	16.7 / 83.3	21.1 / 78.9
Family Environment	18.7 / 81.3	18.9 / 81.1	16.5 / 83.5	22.9 / 77.1	19.9 / 80.1	25.6 / 74.4	19.8 / 80.2	19.6 / 80.4	19.4 / 80.6	23.3 / 76.7	18.2 / 81.8
Clinical	34.7 / 65.3	24.1 / 75.9	31.7 / 68.3	38.6 / 61.4	35.4 / 64.6	31.1 / 68.9	34.6 / 65.4	37.8 / 62.2	33.4 / 66.6	26.7 / 73.3	31.8 / 68.2
Good Value Housing	34.2 / 65.8	30.6 / 69.4	27.4 / 72.6	45.8 / 54.2	35.3 / 64.7	36.4 / 63.6	38.5 / 61.5	39.4 / 60.6	35.3 / 64.7	26.7 / 73.3	33.1 / 66.9
Air Connectivity	28.2 / 71.8	29 / 71	33.0 / 67.0	34.1 / 65.9	30.7 / 69.3	28.7 / 71.3	24.5 / 75.5	27.3 / 72.7	29.4 / 70.6	36.7 / 63.3	29.9 / 70.1
Highway Service	36.8 / 63.2	32.7 / 67.3	42.9 / 57.1	49.4 / 50.6	38.7 / 61.3	43.7 / 56.3	38.9 / 61.1	45 / 55	40.8 / 59.2	40 / 60	44.5 / 55.5
Driving Time to Business	44.6 / 55.4	34.6 / 65.4	33.2 / 66.8	39.8 / 60.2	33.9 / 66.1	25.8 / 74.2	42.3 / 57.7	34.8 / 65.2	36 / 64	40 / 60	38.8 / 61.2
Mobile Phone Service	33.3 / 66.7	32.4 / 67.6	27.1 / 72.9	24.1 / 75.9	34.5 / 65.5	31 / 69	37.7 / 62.3	42 / 58	32.9 / 67.1	36.7 / 63.3	31 / 69
High Speed Internet Connectivity	37.0 / 63.0	25 / 75	20.9 / 79.1	30.1 / 70.0	34.1 / 65.9	21.3 / 78.7	35.9 / 64.1	37.5 / 62.5	29.9 / 70.1	23.3 / 76.7	26.4 / 73.6
Job Availability	24.2 / 75.8	17.1 / 82.9	22.6 / 77.4	32 / 68	14.4 / 85.6	15.2 / 84.8	19.8 / 80.2	26.8 / 73.2	21 / 79	13.3 / 86.7	20.5 / 79.5
Career Advancement Opportunities	40.0 / 60.0	19.3 / 80.7	27 / 73	31.5 / 68.5	21.2 / 78.8	22.7 / 77.3	27.4 / 72.6	39.1 / 60.9	26.9 / 73.1	13.3 / 86.7	27.7 / 72.3
High Paying Jobs	32.3 / 67.7	21.9 / 78.1	28 / 72	42.7 / 57.3	29.9 / 70.1	25 / 75	31.7 / 68.3	34.8 / 65.2	30.1 / 69.9	26.7 / 73.3	28.6 / 71.4
Equal Opportunity Based on Gender / Race	34.4 / 65.6	27.9 / 72.1	23 / 77	28 / 72	19 / 81	21.6 / 78.4	21.5 / 78.5	28.8 / 71.2	23.8 / 76.2	23.3 / 76.7	21.9 / 78.1
Image of City as a Place to Live	30.7 / 69.3	33.3 / 66.7	32.2 / 67.8	40 / 60	32.5 / 67.5	28.4 / 71.6	34.1 / 65.9	33 / 67	32.9 / 67.1	50 / 50	31.9 / 68.1
Effective Government Leadership	27.6 / 72.4	27.8 / 72.2	25.8 / 74.2	31.3 / 68.7	24.6 / 75.4	21.6 / 78.4	24.3 / 75.7	29.7 / 70.3	26.1 / 73.9	26.7 / 73.3	31.9 / 68.1
Strong Business Growth	29.7 / 70.3	20.8 / 79.2	35.1 / 64.9	30.9 / 69.1	28 / 72	26.7 / 73.3	23.7 / 76.3	37.5 / 62.5	29.2 / 70.8	23.3 / 76.7	32.9 / 67.1
Location for High Tech Activity	40.5 / 59.5	25.5 / 74.5	30.6 / 69.4	39.8 / 60.2	41 / 59	31.1 / 68.9	32.2 / 67.8	37.8 / 62.2	34.8 / 65.2	30 / 70	33.9 / 66.1
Survey Respondents	77	105	227	63	169	92	205	112	1073	30	313

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

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