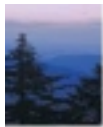


Northwest North Carolina Comprehensive Economic Development Strategy



Looking toward the future

Northwest North Carolina CEDS

SWOT Analysis

Yadkin 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: Quality of Life
- d. Factor Four: Infrastructure
- e. Factor Five: Economic Development Efforts

III. Appendix: Survey Summary and Results

Yadkin County SWOT Analysis

July 2003



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

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

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Purpose of the SWOT Analysis

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

The *Yadkin 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.

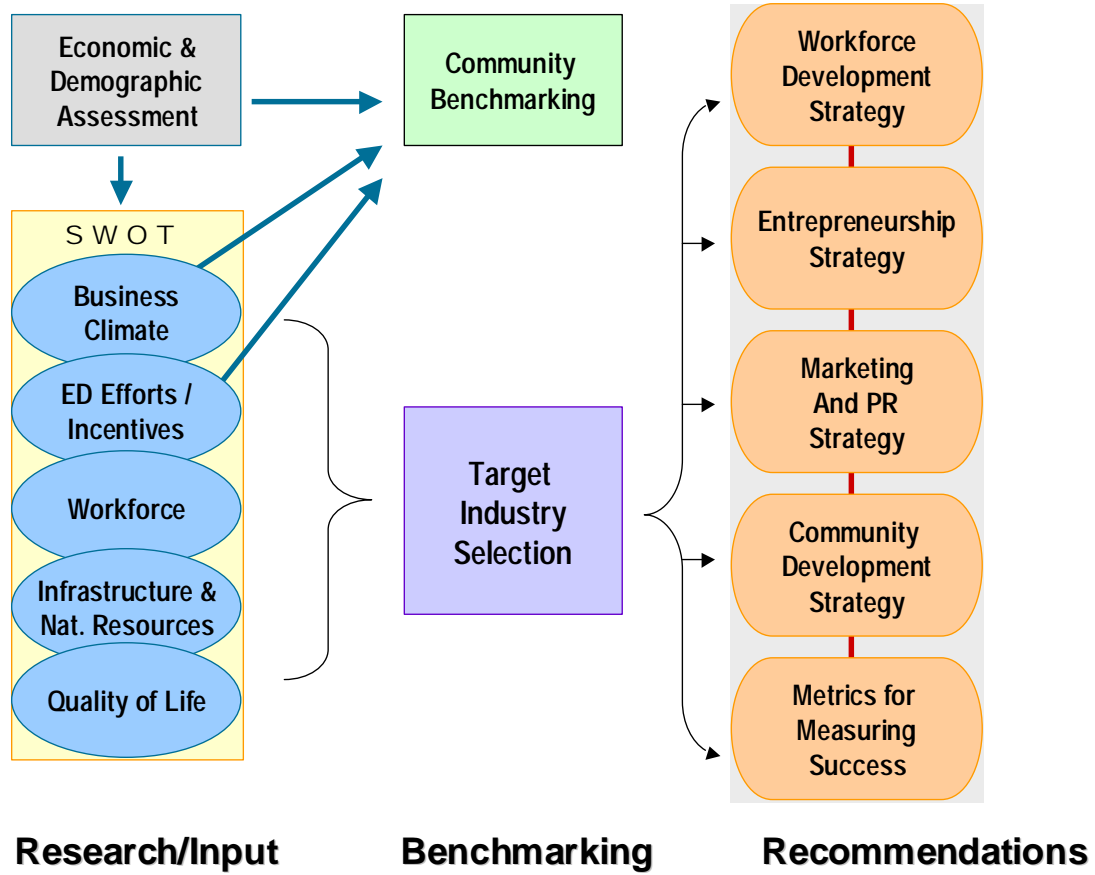
The *SWOT Analysis*, Report Two, takes the investigation of Yadkin County's economic conditions one step further. First, it incorporates the *perceptions* of the County that the consulting team gathered during its interviews, focus groups, County tours, and on-line survey. It also considers how closely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

The community's perceptions of Yadkin 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 Yadkin County to learn what weaknesses need to be addressed and the strengths that must be promoted to make the County, and surrounding region, conducive to economic prosperity. The SWOT assessment is structured around five factors critical to the County's future success:

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

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

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

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

Key Findings

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

While more than 50 people participated in focus groups, the on-line survey provided an opportunity for all residents of Yadkin County to provide their thoughts on economic development issues. In total, 112 residents and 36 companies responded to the survey. A detailed summary of survey findings is provided as an appendix to this report, highlights are provided in the two tables below.

Yadkin 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>Low Crime</i>	<i>R&D Resources</i>
2 <i>Low Crime</i>	<i>Local Community College</i>	<i>Strong Economic Growth</i>
3 <i>Good Healthcare</i>	<i>Highway</i>	<i>Effective Government Leadership</i>
4 <i>Business Climate</i>	<i>Family Environment</i>	<i>Arts / Culture</i>
5 <i>General Economy</i>	<i>Climate</i>	<i>Location for High Tech</i>

Yadkin 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>Climate</i>	<i>High Paying Jobs</i>
2 <i>Low Crime</i>	<i>Family Environment</i>	<i>University</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Strong Business Growth</i>
4 <i>Family Environment</i>	<i>Good Value Housing</i>	<i>Location for High Tech Activity</i>
5 <i>Job Availability</i>	<i>Local Community College</i>	<i>Arts / Culture</i>

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

- Proximity to Forsyth County
- Transportation Infrastructure
- Utility Infrastructure

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

- **Proximity to Forsyth County.** Fifty-six percent of the Yadkin County workforce commutes outside Yadkin for employment. This is an extremely high number of commuters. This fact can be looked at from a negative perspective, in that Yadkin County does not have the employment within the

County for these workers and these workers are spending their money outside of Yadkin for many of their daily expenses. However, this commuting statistic can also be looked at from a positive perspective, and used to attract business to the County – demonstrating that even though a large portion of the labor force works outside the County, the labor force is already within the County.

- **Transportation Infrastructure.** The transportation infrastructure is ideal for business development. With Hwy 77, 421, 21, and 67 all going through Yadkin County, there are numerous opportunities for business access as well as tourism development. The most significant transportation point, however, is at the intersection of Hwy 77 and 421. This intersection must be exploited for potential business development, with a focus on retail potential.
- **Utility Infrastructure.** Water and wastewater infrastructure is currently a limiting factor to development in Yadkin County. Utility infrastructure to serve some of the key transportation nodes in the County is insufficient to support business development and should also be addressed.

Factor 1: Business Climate and Entrepreneurship Development

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

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

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, seaports, and to metropolitan areas

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

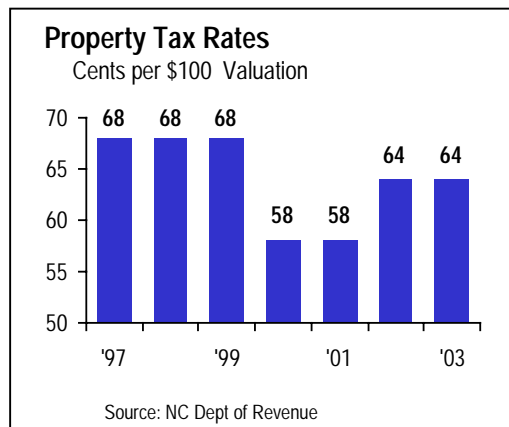
Entrepreneurial environment – The availability and/or access to business incubators, research and development facilities, financing and business advisory networks.

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

Yadkin County's Ratings:

Tax Rates

Yadkin County enjoys a low property tax burden but has maintained its rate relatively constant over the years (\$0.64). Jonesville has the highest city rate in the County, but the average city/county rate still falls lower than many of Yadkin's neighbors.



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

While local property taxes are relatively low in North Carolina, the state's personal and corporate income tax rates are generally higher than neighboring Virginia and South Carolina. Virginia's sales tax rate is lower, and evidence of this can be seen by the loss of some retail spending in northern counties to establishments across the 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, Yadkin County's tax burden should still be considered attractive to these types of industries.

The **Regulatory Climate** has traditionally been fairly standard until recently, with the adoption of a Land Use Plan and Zoning Ordinance for the County. These new land development ordinances will make doing land development in Yadkin County more costly and will require a higher degree of sophistication to maneuver through the codes. However, both the plan and the zoning ordinance will help to protect land values, the environment, and safety in the county, while providing assurances to potential business interests. This was a significant step for the County to take in controlling development in the next few decades. One business respondent to the survey wrote, "Without a favorable referendum for beer and wine sales the County will not likely attract any significant industry."

Industry growth has been on a decline in Yadkin County. The closing of the Sara Lee plant and downsizing of UNIFI has had a significant impact on the economy in Yadkin, with unemployment rates reaching the highest (6%) in the last decade. One of the significant positive industries is viticulture, which has blossomed in Yadkin County since the recent announcement of the Yadkin Valley viticulture region. This will be a major factor in the economic growth in the county.

The **Location** that Yadkin County has is excellent. It is far enough away (30 minute drive from Yadkinville to Downtown Winston-Salem) for residents to experience a rural lifestyle, yet close enough (with a superior transportation network of Hwy 77 and 421) to take advantage of the cultural and entertainment amenities in Winston-Salem or Greensboro.

Communication and Collaboration between the public and private sectors has been somewhat effective, as is evidenced by the zoning ordinance. This was developed mainly due to private citizen concerns about how certain land uses would impact private property. The government took positive steps to address this concern. It is difficult to understand why the County does not put the same amount of support as it did behind the land use issue as it does behind the issue of the beer, wine, and liquor sales. The viticulture industry has more promise for Yadkin County tourism and sales tax revenue than any other industry right now. Understanding the religious issues associated with such an effort, it is still difficult to understand why a county like Yadkin, which is going through an economic slump, does not take advantage of every tool at its disposal. While the one full-time economic developer for the County is effective and knowledgeable about successful economic development initiatives, he is only as successful as the leadership that backs him. It appears that the ED staff has many separate individuals to report to, creating redundant work and numerous inefficiencies, not to mention the headaches for the staff person. A Countywide economic development approach can be effective but only if all city and County leadership is supportive of staff efforts and only if all share a common vision for economic development. Neither of these two important ingredients seems to exist in Yadkin County.

The **Entrepreneurial environment** in Yadkin County is virtually non-existent. Counties like Yadkin that have traditionally relied upon the textile and tobacco industries are understandably reticent to adopt economic development policies geared towards promoting small business, but the leadership must understand that creating and fostering an entrepreneurial environment will not take too many resources and

a return on the investment will be great for the County. One business respondent said, "We need to help local business develop and maintain good entrepreneurial spirit in the community."

The **Incentive policy** in Yadkin County is geared towards larger industry. The incentive policy states, "an amount equal to the new property tax generated by the new or expanding industry will be invested in the new industry to assist with infrastructure needs." This policy is not an incentive for small businesses.

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

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

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

Factor 2: Workforce & Education

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

K-12 Educational Facilities – 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, Bachelor’s, or advanced degrees. The higher percentage of residents with Bachelors’ degrees the greater the potential to support high-skill, high wage jobs.

Yadkin County’s Ratings:

K-12 Education.

Schools are overcrowded in Yadkin County. There are currently eight elementary schools, two high schools and no middle school. The recently failed school bond referendum (tried for \$20million) was proposed to address this problem. Residents ranked K-12 Education as being very important and as being moderate in local condition.

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

Access to **Higher education** is very good. With its close proximity to Forsyth County and the numerous colleges and universities within easy commuting distance for Yadkin County residents enjoy great access to higher education. In addition, Surry Community College maintains a satellite campus in Yadkinville. The campus offers Basic Skills Programs, Technology Courses, Vocational Training & Retraining, and Curriculum Courses/Programs and will have specialty course offerings in viticulture and a winery on campus.

Workforce Development will be housed at the Surry Community College satellite campus. Both residents and companies feel that the Community College is not only important, but that the community college ranks high in terms of local condition.

Labor pool

More than 53% of the Yadkin County labor force (18,000 in 2000) commutes outside Yadkin County for employment. However, the potential labor pool could draw in excess of 100,000 from neighboring counties to support business development in Yadkin County.

The **Educational attainment levels** in Yadkin County are low. Less than 60% of the workforce has a high school diploma. However, Yadkin County has made significant advances with the number of individuals reporting Some College increased from 12% in 1990 and 18% in 2000. The number of individuals reporting a 4-year College Degree, however, is still lagging behind the national average, with only 7% of Yadkin residents reporting this attainment, versus 15% for the U.S.

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 Yadkin’s infrastructure are the following:

Land – The costs and availability of commercial and industrial land

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

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

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

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

Yadkin County’s Ratings:

A large amount of **Land** is available for commercial and industrial development. The price is much less than within Forsyth and Davie Counties, but utilities to some of these areas are limited.

The **Transportation infrastructure** in Yadkin County is excellent. Interstate 77 connects to major markets north and south, and U.S. Highway 421 connects to Winston-Salem to the East and to Wilkesboro to the West. Other major roads in the County include 601, 21, and 40.

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

Telecommunications infrastructure is limited and can be improved. KPMG reports that Yadkin County has cable modem service as well as limited ISDN and DSL service. Cell phone reception can be limited in certain areas of the County and is certainly a critical need for business development. Sprint and Yadkin Valley Telecom are the primary telecommunication providers in Yadkin County.

Utilities

Wastewater infrastructure – The County has done several feasibility assessments but has not put the infrastructure to support business growth near major highway intersections. The County currently has a surplus wastewater treatment capacity of approximately 1,500,000 gallons/day. The cost of extending water and wastewater lines to certain key commercial areas in the county could be very expensive and the may require a joint financing scheme with City/County participation. Energy United, Surry-Yadkin EMC, and Duke Power are the primary electric service providers in the County.

There are approximately nine **Available buildings and sites** in the County ranging in size from 10 – 38 acres. In addition, there are numerous sites in the Jonesville area that companies could take advantage of. Only about half of the sites have an existing building on the site, ranging in size from approximately 220,000 sf to 37,000 sf. Most of the available sites have utilities, with some of them offering only septic tanks, while others have sewer lines.

Factor 4: Quality of Life

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

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

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

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

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

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

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

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

Yadkin County’s Ratings:

Safety

Although a crime rate of 23.1 per 1000 people does not seem high, this is a fairly high rate for a rural county. Nevertheless, it is a lower rate than its urban neighbor and a draw to individuals interested in a more rural lifestyle with less crime than a major metropolitan area.

The average **Commute time** for those commuting is 27.5 minutes. Most commuters are traveling to Forsyth County, and with the extensive transportation network can easily reach Winston-Salem within a timeframe acceptable to most commuters.

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

A number of **Retail choices** exist for Yadkin County residents to not only purchase main staples but also some specialty items for clothing, hardware, and accessories. Winston-Salem still remains the main hub for Yadkin County residents for other retail spending.

Health care

Hoots Memorial Hospital in Yadkinville and the Hugh Chatham Healthcare facility in Elkin are the two primary health care facilities for the county. That being said, Yadkin County has only 5 physicians per 10,000 persons, a very low statistic for a county neighboring a major metropolitan area.

Community image

The County is beautiful with rolling hills and a very idyllic setting. The cities however have older buildings with corrugated metal facades over beautiful red brick and newer buildings without character. It is clear in driving through the county that people care about their yards and their streets, but it is also obvious that not much has been done in recent years to enhance the beauty of older buildings or to create a quality standard for new commercial construction.

The **Diversity of housing stock** in Yadkin has increased significantly in recent years with the construction of new housing developments in the East portion of the County, yet there is still a gap in available middle-income housing (or starter homes ranging in price from \$80,000 – 120,000). Most housing is either custom housing or low-income/modular housing.

Recreation and Entertainment is a mixed bag for the county. The Natural environment is certainly an asset – lots of open space, the Yadkin River, and the beautiful countryside. In addition, the County has a park adjacent to a new YMCA facility. However, there are few entertainment options beyond a small movie theatre, bowling and bingo; and retail options are limited. Furthermore, without liquor, beer or wine sales, restaurant options remain limited.

Factor 5: Economic Development Efforts

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

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

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

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

Yadkin County’s Ratings:

External Promotion

The Piedmont Triad Partnership does most external promotion for business recruitment in Yadkin County. However, Yadkin County also has developed brochures and other marketing material such as web pages both for business recruitment and tourism purposes. The materials developed by Yadkin County are generic and not at all targeted towards a specific industry or tourist. The materials for the Piedmont Triad are targeted towards specific business but are geared more towards Forsyth County rather than the rural counties that are part of the Triad.

The local media has not been cooperative during this project and is seemingly counter city and county efforts to enhance the economy. This relationship can have negative effects on the county’s ability to effectively promote itself.

Internal promotion

The mindset of leadership is still geared towards industrial recruitment (textile/tobacco company town). There not only seems to be a lack of a common vision for economic development, but there also seems to be a lack of understanding about what the focus for economic development should be and how all the cities can collaborate together in promoting the county as a place to do business.

Resource allocation

The County has one person focused on the County Chamber of Commerce, the Commerce Council as well as County Economic Development Commission. This is a large task for any one individual who ends up having essentially many individuals to report to and to whom he must deliver results. However, this type of

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

countywide initiative can be an effective use of funds if all the cities and the County share the same vision for economic development priorities. The perception is that the cities do collaborate effectively, but not efficiently.

APPENDIX ONE: *Yadkin County Community Input*

AngelouEconomics is pleased to present the results of the *Yadkin 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 148 surveys completed for Yadkin County. Of these, 36 responses were from corporations and 112 were from residents.

Summary of the Yadkin County Results

Like most counties in the 8-County CEDS region, Yadkin residents and companies place a high value on education, healthcare, and quality of life issues. These factors are followed closely by business climate and job-related issues.

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

Yadkin 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>Low Crime</i>	<i>R&D Resources</i>
2 <i>Low Crime</i>	<i>Local Community College</i>	<i>Strong Economic Growth</i>
3 <i>Good Healthcare</i>	<i>Highway</i>	<i>Effective Government Leadership</i>
4 <i>Business Climate</i>	<i>Family Environment</i>	<i>Arts / Culture</i>
5 <i>General Economy</i>	<i>Climate</i>	<i>Location for High Tech</i>

Yadkin 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>Climate</i>	<i>High Paying Jobs</i>
2 <i>Low Crime</i>	<i>Family Environment</i>	<i>University</i>
3 <i>Good Healthcare</i>	<i>Low Crime</i>	<i>Strong Business Growth</i>
4 <i>Family Environment</i>	<i>Good Value Housing</i>	<i>Location for High Tech Activity</i>
5 <i>Job Availability</i>	<i>Local Community College</i>	<i>Arts / Culture</i>

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

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

Residents

Rank by Importance / Local Condition

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

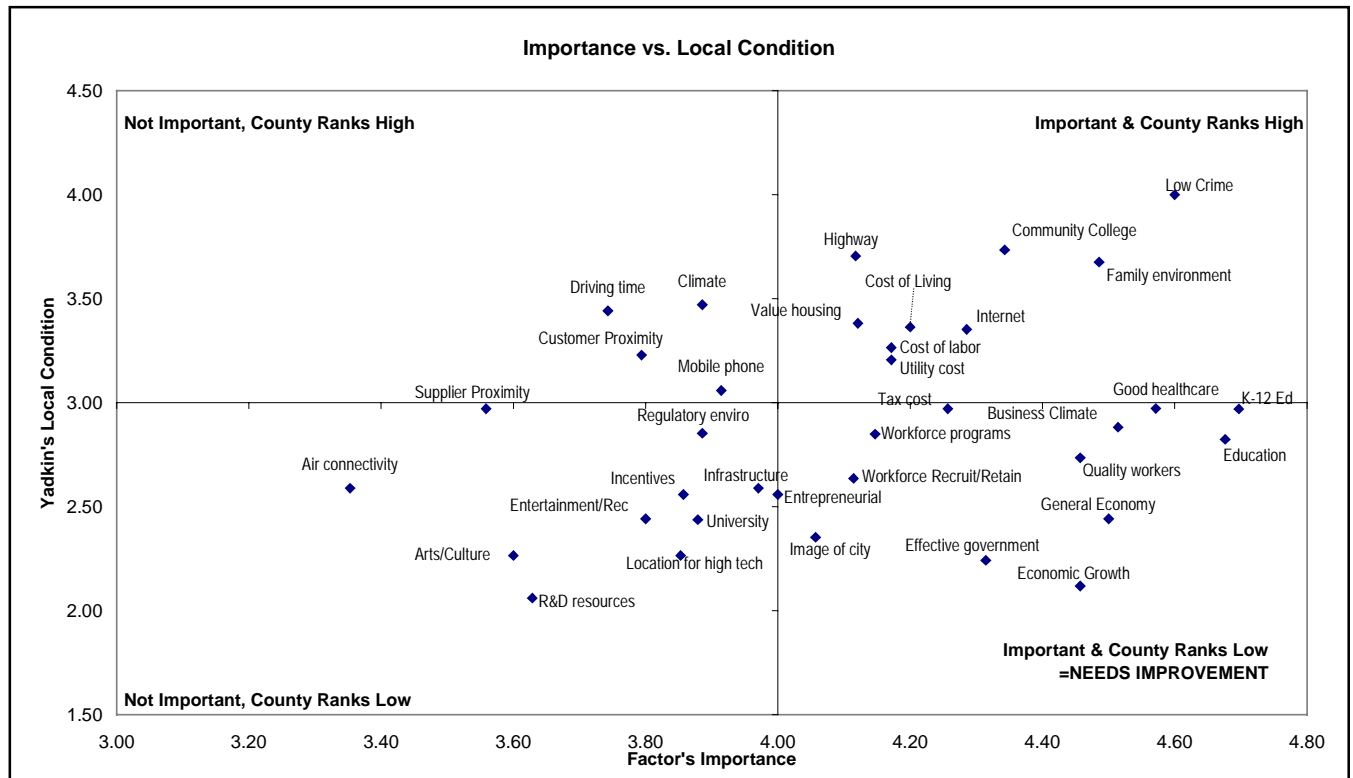
Companies

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

Looking at all factors, K-12 education is the most important factor to companies, but companies rank it about average locally. Low crime is rated high importance and also as the most successful factor in Yadkin. The least important factor to Yadkin companies is air connectivity. Economic concerns and worker quality are highly important, generally rank low in satisfaction. Overall, companies expressed high levels of satisfaction in two important areas: the community college and family environment in Yadkin.



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

- "We lack an overall team commitment for the betterment of our community"
- "Improved communications and common vision with city, County, and education leaders"
- "Open, progressive, respectful, elected leaders"
- "I would like to see a clear plan for dealing with the population growth"
- "More economic growth, better school facilities, County water"
- "Just more progressive thinking. Moving forward and keeping up with society."

Other comments include:

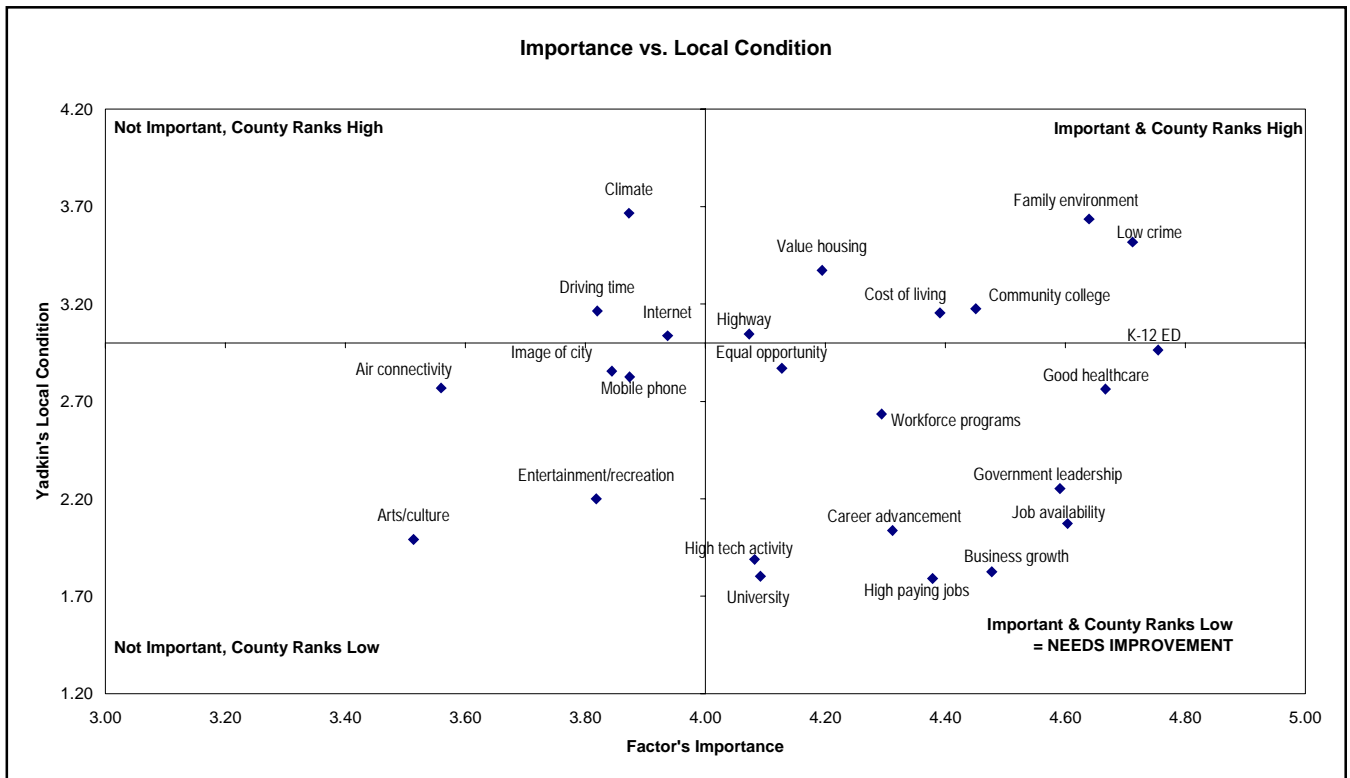
- "We need to help local business develop and maintain good entrepreneurial spirit in the community"
- "CREATE a future"
- "Yadkin County is a beautiful County"
- "Without a favorable referendum for beer and wine sales the County will not likely attract any significant industry"
- "More input from business to school system... their "finished product" is our "raw material"

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



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

- "Middle schools built to handle student load"
- "We need to be able to recruit business/industries that will allow us to retain the best and brightest of our students"
- "Economic growth for the entire area, not in one or two areas"
- "Arts and entertainment activities are very few and very poor"
- "We need to change in order to thrive"
- "I would like to see the Town of Yadkinville and Yadkin County work together more"
- "Create a tax base or move over and let the money and the world pass us by"
- "JOBS, JOBS, JOBS and more family entertainment"
- "The Fast Food industry is not going to keep the County in good standing"

Other comments include:

- "We need to make sure we do not repeat the mistakes of the past by not planning for the future"
- "Yadkinville, no more eating places"
- "I feel blessed to live in Yadkin County"
- "This is a great place to raise a family, but opportunities are limited"
- "All the town are dead on weekends – need entertainment, festivals to liven things up on the weekends here."
- "Yadkin County need better leadership in general"
- "The community is moving in the right direction with a land use plan"
- "Please stop the odor at the Dobson Chicken plant"
- "Our future depends on our ability to rediscover our resources and make the best of them."

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 concerns 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>

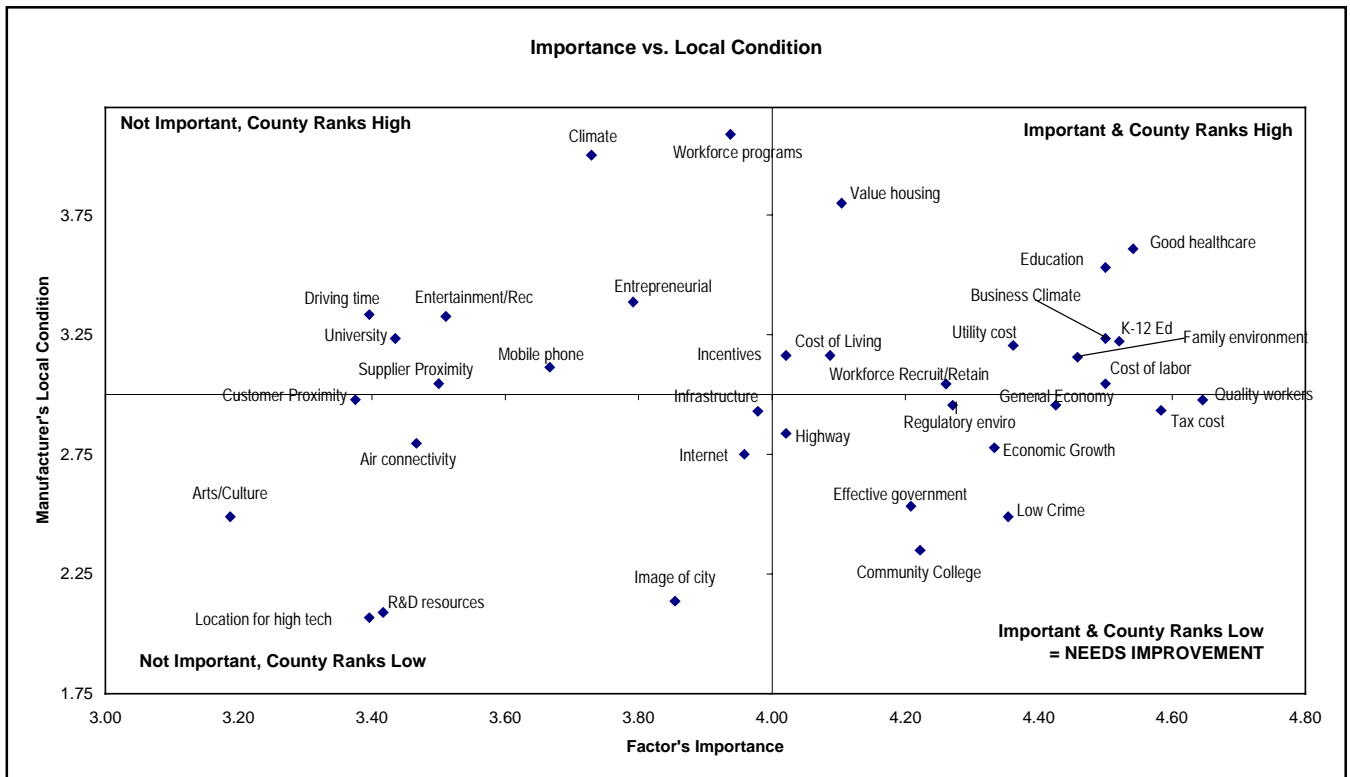
8-County Regional Summary: Residents		
<i>Top 5 Issues Ranked within Each Category</i>		
Important Criteria for a Place to Live	Criteria in which County is Successful	Criteria in which County Needs Improvement
1 <i>K-12 Education</i>	<i>Family Environment</i>	<i>University</i>
2 <i>Low Crime</i>	<i>Local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

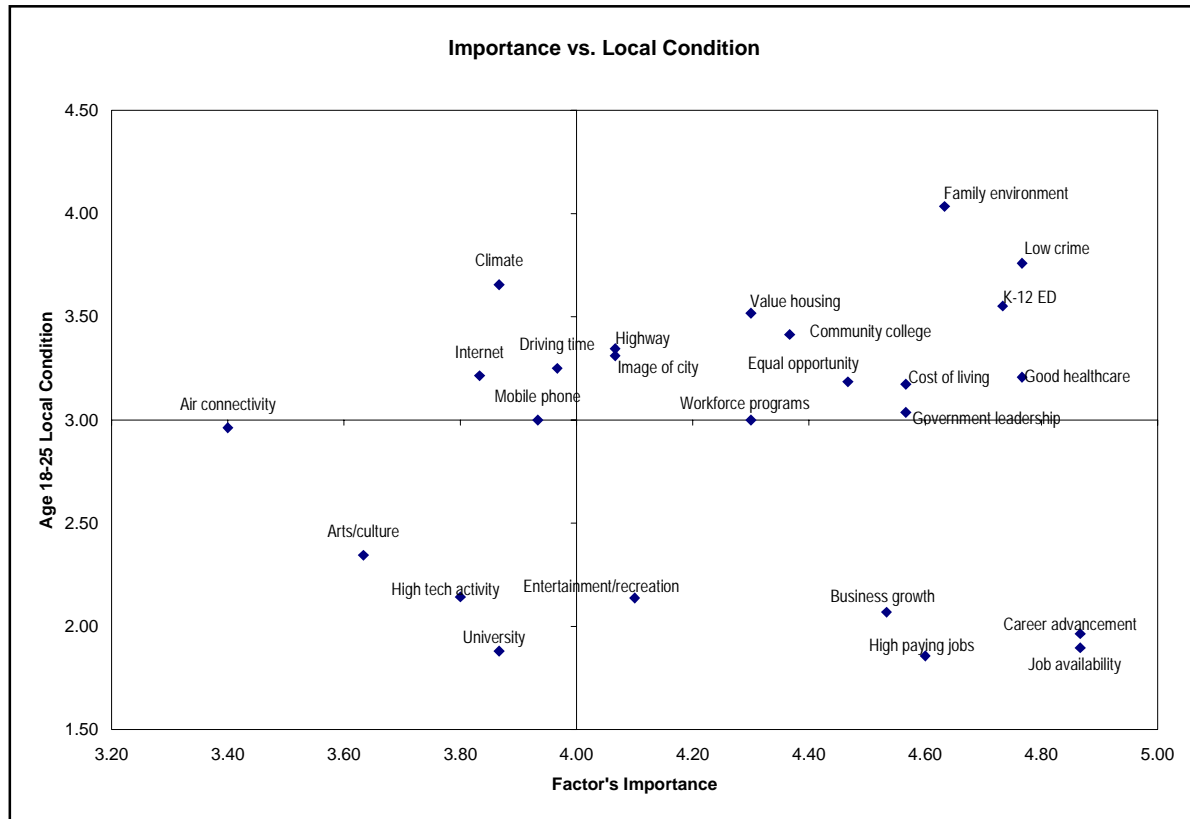
- "We need to embrace the future and focus on getting there with every ounce of our will and energy"
- "A more aggressive recruiting program of New and Larger companies to settle our County"
- "The hope is that the decisions made today will improve the future for our County and the young people, which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

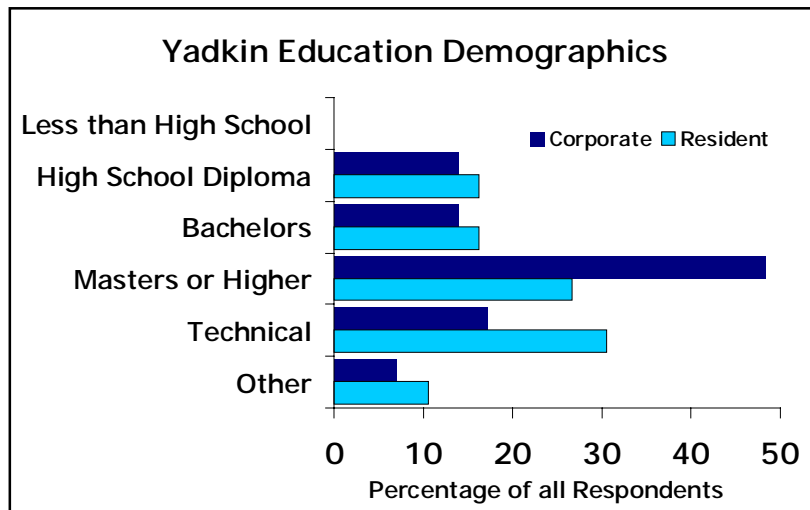
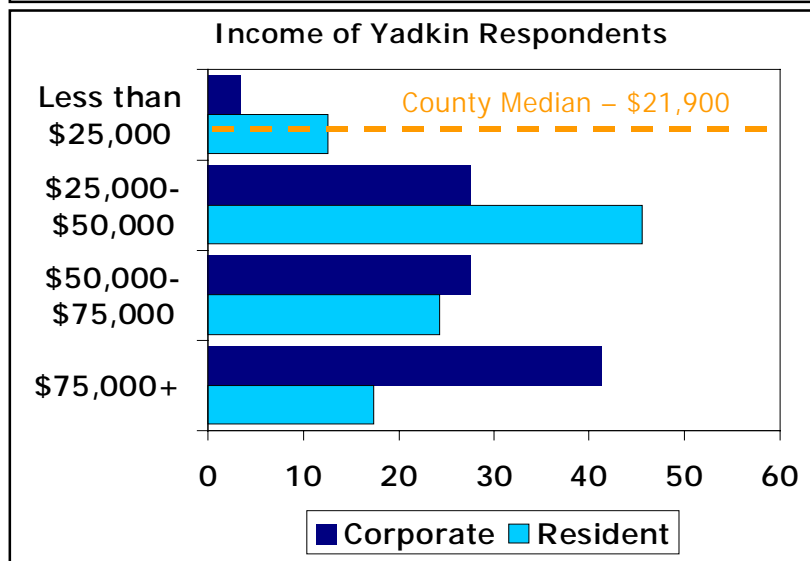
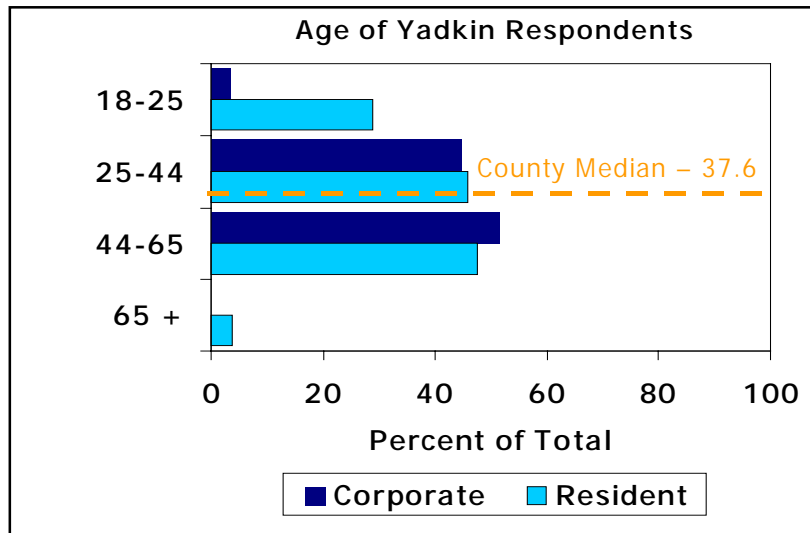
Not surprisingly, the region’s younger population places a high value on “Job availability” and “Career advancement” but rates these and other economic factors low in regional performance. Factors that are rated as both important and performing well locally in the eyes of the younger population include: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

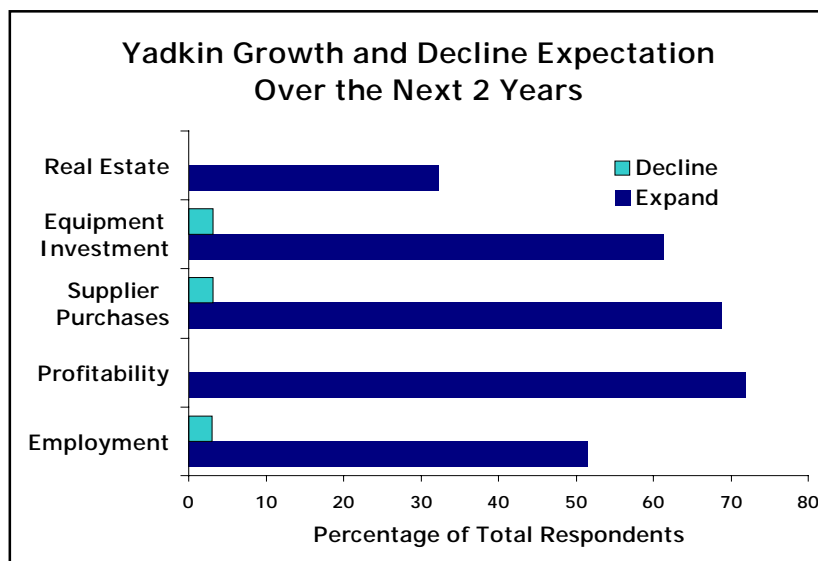
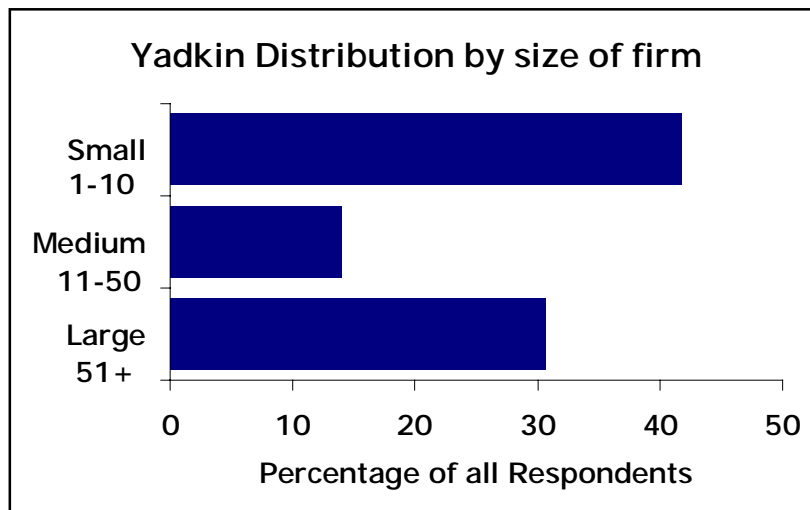
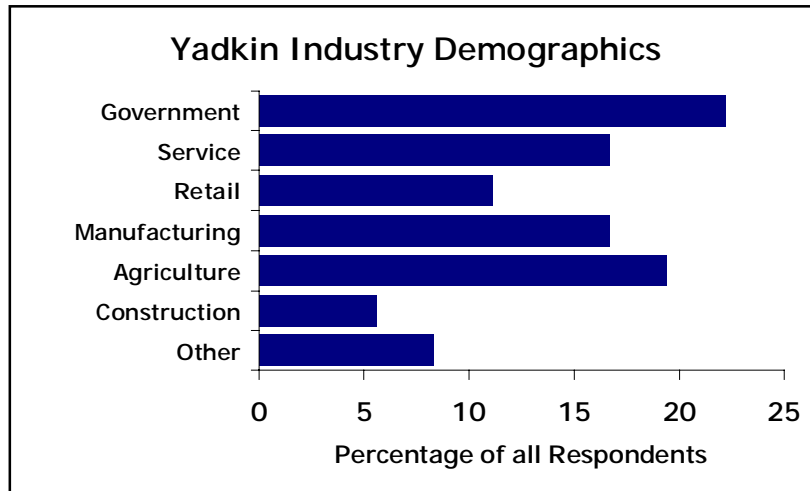


Comments by respondents of age 18-25 were most specific in their desire for job opportunities and entertainment:

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

Demographic Profile of Yadkin Respondents





APPENDIX TWO: Summary Tables for All Counties

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

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

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

The two tables for Residents are organized similarly.

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

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

Importance / Local Condition

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

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

Importance / Local Condition

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

**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

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

Residents: % Important

% of Respondents that rate factor as important

% Somewhat Important / % Very Important

	Alleghany	Ashe	Bevise	Forsyth	Rockingham	Stokes	Surry	Youthn	TOTAL	Residents 18-24	Residents 25-44
K-12 ED	1.3 / 97.4	6.5 / 91.5	6.2 / 93.8	13.3 / 81.9	5.4 / 94.6	4.4 / 91.1	4.3 / 95.9	7.2 / 92.8	5.9 / 97.7	6.7 / 93.3	6.1 / 93.6
University	17.6 / 82.4	25.5 / 74.5	27.1 / 72.9	30.5 / 69.5	27.2 / 72.8	25.6 / 74.4	24.9 / 75.1	29.1 / 70.9	26.2 / 73.8	23.3 / 76.7	26.1 / 73.9
Community College	27.6 / 72.4	29 / 71	34.5 / 65.5	39 / 61	21.8 / 78.2	28.4 / 71.6	17.1 / 82.9	37.5 / 62.5	28.2 / 71.8	43.3 / 56.7	29.7 / 70.3
Workforce Training Programs	32.9 / 67.1	28.7 / 71.3	38.5 / 61.5	32.1 / 67.9	22.9 / 77.1	34.4 / 65.6	25.6 / 74.4	40 / 60	31.5 / 68.5	33.3 / 66.7	40.1 / 59.9
Cost of Living	17.3 / 82.7	24.1 / 75.9	20.9 / 79.1	32.5 / 67.5	26.4 / 73.6	18.2 / 81.8	27.3 / 72.7	35.1 / 64.9	25.2 / 74.8	23.3 / 76.7	27.1 / 72.9
Entertainment / Recreation	28.9 / 71.1	23.6 / 76.4	33.0 / 67.0	33.7 / 66.3	35.2 / 64.8	22.2 / 77.8	35 / 65	36.9 / 63.1	32 / 68	23.3 / 76.7	35.5 / 64.5
Arts / Culture	40 / 60	27.1 / 72.9	26.5 / 73.5	39.8 / 60.2	36.5 / 63.5	24.4 / 75.6	31.2 / 68.8	24.1 / 75.9	30.6 / 69.4	6.7 / 93.3	26.8 / 73.2
Low Crime	19.7 / 80.3	11.1 / 88.9	13.7 / 86.3	18.1 / 81.9	15.5 / 84.5	14.4 / 85.6	15.9 / 84.1	19.6 / 80.4	15.6 / 84.4	23.3 / 76.7	17.3 / 82.7
Good Healthcare	19.7 / 80.3	12 / 88	16.8 / 83.2	23.2 / 76.8	19.2 / 80.8	22.2 / 77.8	15.5 / 84.5	25.9 / 74.1	18.5 / 81.5	16.7 / 83.3	21.1 / 78.9
Family Environment	18.7 / 81.3	18.9 / 81.1	16.5 / 83.5	22.9 / 77.1	19.9 / 80.1	25.6 / 74.4	19.8 / 80.2	19.6 / 80.4	19.4 / 80.6	23.3 / 76.7	18.2 / 81.8
Clinical	34.7 / 65.3	24.1 / 75.9	31.7 / 68.3	38.6 / 61.4	35.4 / 64.6	31.1 / 68.9	34.6 / 65.4	37.8 / 62.2	33.4 / 66.6	26.7 / 73.3	31.8 / 68.2
Good Value Housing	34.2 / 65.8	30.6 / 69.4	27.4 / 72.6	45.8 / 54.2	35.3 / 64.7	36.4 / 63.6	38.5 / 61.5	39.4 / 60.6	35.3 / 64.7	26.7 / 73.3	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	18.2 / 81.8	19.8 / 80.2	26.8 / 73.2	21 / 79	13.3 / 86.7	20.5 / 79.5
Career Advancement Opportunities	40.0 / 60.0	18.3 / 81.7	27 / 73	31.5 / 68.5	21.2 / 78.8	22.7 / 77.3	27.4 / 72.6	39.1 / 60.9	26.9 / 73.1	13.3 / 86.7	27.7 / 72.3
High Paying Jobs	32.3 / 67.7	21.9 / 78.1	28 / 72	42.7 / 57.3	29.9 / 70.1	25 / 75	31.7 / 68.3	34.8 / 65.2	30.1 / 69.9	26.7 / 73.3	28.6 / 71.4
Equal Opportunity Based on Gender / Race	34.4 / 65.6	27.9 / 72.1	23 / 77	28 / 72	19 / 81	21.6 / 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

	Residents																	
	Allegheny	Anne	Bowie	Forsyth	Rockingham	Stokes	Surry	Yadkin										
Companies																		
Education	6	4	1	2	7	5	3	3	K-12 ED	1	3	2	5	7	6	4	3	8
K-12 Ed	2	3	1	5	7	6	4	3	University	4	3	5	1	6	8	2	7	7
University	5	2	7	1	3	3	6	4	Community college	5	4	6	3	2	8	1	7	7
Community College	7	5	6	3	2	3	1	4	Workforce programs	1	6	5	3	4	8	2	7	7
Workforce programs	3	5	4	1	2	3	7	6	Cost of living	3	8	2	1	5	4	7	6	6
Workforce Recruit/Retain	1	6	2	3	5	3	4	7	Entertainment/Recreation	7	5	4	1	8	3	2	6	6
Cost of Living	1	8	3	2	4	5	7	6	Arts/Culture	7	2	3	1	8	5	4	6	6
Entertainment/Rec	7	2	4	1	3	5	3	6	Low crime	1	2	3	7	8	4	6	5	5
Arts/Culture	7	2	3	1	8	5	4	6	Good healthcare	4	8	3	1	6	5	2	7	7
Low Crime	1	4	2	7	3	5	6	3	Family environment	3	4	1	2	8	6	5	7	7
Good healthcare	7	8	5	1	3	4	2	6	Clinical	1	3	5	3	7	4	2	6	6
Family environment	2	6	1	3	7	5	4	3	Value housing	7	8	1	2	5	3	6	4	4
Clinical	5	7	4	2	6	1	3	3	Air connectivity	3	7	2	1	3	5	4	6	6
Value housing	7	8	1	2	3	4	6	5	Highway	7	8	1	3	5	6	2	4	4
Business Clinical	3	3	1	2	3	7	6	5	Driving time	7	3	2	1	4	6	3	5	5
Tax cost	1	4	2	7	3	3	6	5	Mobile phone	4	7	3	1	6	8	2	5	5
Regulatory enviro	1	8	2	3	7	4	5	6	Internet	3	7	2	1	4	8	5	6	6
Incentives	1	7	2	3	4	3	5	6	Job availability	3	5	2	1	7	4	6	3	3
Customer Proximity	3	6	2	1	4	7	3	5	Career advancement	3	6	2	1	7	5	4	3	3
Supplier Proximity	3	7	4	1	5	6	2	3	High paying jobs	3	6	2	1	7	5	4	3	3
Quality workers	1	8	3	2	4	5	7	6	Equal opportunity	3	4	2	1	8	7	6	5	5
Cost of labor	1	8	5	2	4	2	7	6	Image of city	3	3	1	4	7	5	2	6	6
Entrepreneurial	1	4	3	2	7	3	5	6	Government leadership	3	5	2	1	6	7	4	3	3
Infrastructure	2	6	3	1	5	3	4	7	Business growth	4	3	2	1	8	5	5	7	7
Air connectivity	3	7	3	1	2	5	4	6	High tech activity	2	4	3	1	7	8	6	5	6
Highway	7	8	3	2	5	6	4	1										
Driving time	7	8	3	1	5	6	2	4										
Mobile phone	5	7	4	1	6	3	3	2										
Internet	2	7	3	1	5	3	6	4										
Utility cost	3	7	1	2	6	5	3	4										
General Economy	5	3	1	2	3	6	7	4										
Image of city for business	5	3	2	1	7	3	4	6										
Effective government	1	5	3	2	6	7	4	3										
Economic Growth	3	4	1	2	3	7	6	5										
Location for high tech	2	4	3	1	6	3	7	5										
R&D resources	2	3	5	1	7	3	6	4										

