MARKET ST

REGIONAL INPUT SUMMARY

Piedmont Triad Region, N.C.

Submitted by
MARKET STREET SERVICES, INC.
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MARKET ST

LIVE GROW WORK

Market Street brings original insights and clarity to the evaluation and revitalization of the places where people, live, grow and work. *Market Street* inspires trust in all community stakeholders – citizens, educators, leadership and industry – because our holistic, proactive process takes into account all the aspects that shape community life. Through honest and informed assessments, *Market Street* can equip you with the tools to create meaningful change. Our solutions successfully merge our unique vision with your economic and social realities.

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EXECUTIVE SUMMARY

As part of the first stage of *Market Street's* work for the Piedmont Triad Region, this *Regional Input Summary* report includes feedback and opinions solicited from a broad range of key community stakeholders. Community input was gathered through individual interviews, focus group meetings, and an online survey. Community participation and engagement is a critical component to laying the groundwork for the success of the *Regional Vision Plan*.

Focus Groups and Interviews

Market Street conducted over 30 individual interviews with key economic development partners. Interviews were held across the Region and included people involved with private businesses, regional organizations, public school systems, higher education, elected government positions, charitable organizations, and other economic development entities.

Market Street also facilitated nine focus group meetings, where many individuals from similar backgrounds were invited to participate in open discussions regarding the future of the Piedmont Triad Region and key issues that need to be addressed.

Labor Quality and Availability

Many interviewees and focus group participants felt that the Region has a readily available semi-skilled and unskilled workforce. However, it is difficult to attract professional level workers and technical workers to the Region.

Workforce Development, Education, and Training

The Region's K-12 education system needs improvement and determination for excellence. Interviewees and focus group participants also see a need for universities in the Region to collaborate more with each other and with businesses. Students need more real world experience, and the research capacity of the universities is still developing.

Business Climate

Many feel that the Region has a friendly business climate. However, there needs to be more coordination, support, and resources for entrepreneur and small business development.

Tourism

The Region has a tremendous number of outdoor recreation and cultural assets, but they need to be integrated and marketed together, both to those within and outside of the Region.

Quality of Life

Most interviewees and focus group participants are positive about the quality of life in the Region; this is perceived as a good place to raise a family. However, efforts need to be made to retain and attract more young people and the Creative Class.

Infrastructure

Many feel that the Region's transportation infrastructure is unparalleled and its potential needs to be leveraged more. Lack of cellular and high-speed Internet service in rural areas appears to be an issue. Water and sewer capacity was rated as good or excellent by only half of the respondents; some respondents called for multi-jurisdictional solutions to address this issue.

Economic Development Resources

Regional efforts need to be supported and marketed, both from within and to those outside of the Region. Many feel that there is a lack of coordination in economic development activities.

ONLINE SURVEY

To reach as wide of an audience as possible, an online survey was posted on the Regional Vision Plan website (www.piedmonttriadvision.com). The promotional efforts succeeded in attracting 1,147 respondents. The survey drew respondents from all counties in the Piedmont Triad Region, and even a few from outside of the Region. Guilford County had the greatest participation, followed by Forsyth and Surry Counties. Only a few people participated in the survey from Caswell, Montgomery, and Yadkin Counties.

Participants were asked questions about themselves, their place of employment, as well as questions about the competitiveness of the Piedmont Triad Region. Questions about the Region's competitiveness addressed the economic and community climate, education and workforce skills, infrastructure, business costs and business environment, quality of life, and regional cooperation, as well as the Region's strengths and challenges. Respondents were given the opportunity to rank aspects of the Region's competitiveness on a scale that included excellent, good, average, below average, and poor, as well as enter additional comments.

Economic and Community Climate

Although many respondents perceive the strength of the local economy to be average (44 percent), most want to remain in the community and raise their children there. They are optimistic about the future, but they are not as sure that their children will stay in the community.

Respondents are pessimistic about the availability of local jobs. Less than one percent rated this as excellent, while 45 percent rated this as below average or poor. They were much more pessimistic about job opportunities in manufacturing fields than non-manufacturing fields.

Education, Workforce, Skills

About half of the respondents rated the quality and availability of the workforce as good, and most perceive the quality and availability of job training and continuing education to be good or excellent. Their view of higher education institutions in the Region (universities and community colleges) is quite favorable, but respondents are more pessimistic about the quality of K-12 schools.

Infrastructure

For the most part, many residents perceive the Region's infrastructure as being good. However, the Region received below average and poor rankings from respondents for its public transit and railway systems, and there is notable concern about the capacity of water and sewer systems.

Business Costs and Overall Business Environment

For the most part, respondents perceive business costs in the Piedmont Triad Region to be average to good. One area of significant concern is rising benefits and insurance costs. The availability of land and office space does not appear to be an issue.

Overall, respondents view the Region's business environment and support of economic development as rather average; these aspects received more below average and poor ratings than did business costs. The support and retention of regional businesses received more negative ratings, as did the ease of the permitting process, support for international trade, support for minority and women-owned businesses, and support for entrepreneurship, innovation, and small business. Although availability of bank loans was not a problem, the availability of venture capital was viewed by some as being poor or below average.

Quality of Life

In many cases, the majority of respondents perceived various quality of life aspects to be good or excellent, particularly with health care, safety, housing, cost of living, and recreational and shopping opportunities. However, there is some concern about the quality of the environment, cultural activities, diversity, and the affordability of health care and child care.

Regional Cooperation

The Region received many average rankings for cooperation between urban and rural areas (44.7 percent). The Region also received many average rankings for cooperation among the three major cities (43.9 percent).

When asked what the Piedmont Triad can do to improve cooperation, the greatest number of responses suggested working together rather than competing against each other. Other frequently mentioned suggestions included thinking and acting regionally, improving communication, involving smaller and rural areas, and holding Region-wide discussions and meetings.

Greatest Strengths

By far the most frequently mentioned strength of the Region was its location. Respondents also believed the people, quality of life, transportation and highway network, education, and workforce were among the Region's greatest strengths.

Greatest Challenges

Quality job opportunities are perceived as the Region's greatest challenge, although education and workforce skills were also a major concern.

Other Recurring Issues

Respondents were given the opportunity to enter additional comments for the above issues. Their comments provide detailed perspectives and are selectively included in this report. Based on the comments, a few recurring issues emerged in addition to the above categories:

- There are limited opportunities for young professionals, and respondents are concerned about attracting and retaining these residents.
- There is concern about the lack of coordinated, comprehensive planning and the resulting increase in urban sprawl and environmental degradation.
- Although there were many negative comments regarding the jurisdictional competition for Dell, a number of respondents expect the Dell and FedEx projects to boost the Region's economy.
- There is concern about bridging the disparities between urban and rural areas.
- Many mentioned the importance of inclusiveness of economic development efforts – the importance of engaging minorities, regular citizens, rural areas, as well as small businesses.

Summary

Input collected through the multiple methods of stakeholder participation identified several common themes. The Piedmont Triad Region's location, quality of life, and transportation network are its greatest assets that need to be supported and leveraged. Stakeholders also identified multiple challenges that the Region needs to address:

1. The Region's universities are assets, but research capacity needs to be developed further. The *Competitive Realities* report found that aside from Wake Forest University, the other universities in the Region do not make a substantial impact in terms of their R&D funding. Also, the quality of the K-12 education system is a concern to many stakeholders. Data from the *Competitive Realities* report supports this concern.

2. The Region needs to take steps to attract and retain younger workers and the creative class, by creating job opportunities and developing assets that improve their quality of life. The Region lost population in its 18-to-24 age group between 1990 and 2000, and saw only anemic growth in its 25-to-34 age group.

3. Regional entities must work together on planning for land-use, transit, and water and sewer capacity. Stakeholders are increasingly concerned that lack of planning will affect quality of life and the environment. Data from the *Competitive Realities* report showed that pollution was impacting the Region's environment.

4. The Region needs to support existing businesses, small businesses, and entrepreneurs with increased resources and coordinated efforts. While bank loans are widely available, venture capital funding for high growth firms is scarcer.

5. Regional leadership needs to be more open and inclusive, of all parts of the Region as well as of minorities.

6. The Region needs to work together to leverage its potential. Many stakeholders are very concerned about the Region's economy and its ability to create quality jobs. Promotion of the Region needs to be done internally as well as to those outside of the Region.

The challenges identified here are issues to be considered as the strategic planning process progresses. Critical questions going forward include deciding what challenges are the highest priority, what the Region needs to do to address these challenges, and what organizational capacity it has to take the necessary actions.

Introduction and Methodology

INTRODUCTION

The Piedmont Triad Region ("Triad" or "Region"), defined as the 12-county area that is the jurisdiction of the Piedmont Triad Partnership and several other regional organizations, is a diverse region with multiple assets and continuing needs. The Piedmont Triad Partnership ("PTP") contracted with *Market Street Services*, a national economic and workforce consulting firm headquartered in Atlanta, Georgia, to gain a better understanding of where the Piedmont Triad Region is today, and to update its *Regional Vision Plan* and move the Piedmont Triad Region towards its goals.

Market Street has outlined a process for the Piedmont Triad Region that will succeed in uniting all regional communities under the umbrella of quality growth and sustainable development. At the end of the strategic visioning period, the Triad will have a regional roadmap guiding local communities towards a visionary future together.

As part of the first stage of *Market Street's* work for the Piedmont Triad Region, this *Regional Input Summary* report includes feedback and opinions solicited from a broad range of key community stakeholders. Community participation and engagement is a critical component to laying the groundwork for the success of the *Regional Vision Plan*.

The results of this analysis will be the basis of *Market Street's* work as the project proceeds through the four phases, as outlined below:

I. ***Competitive Realities.*** A realistic assessment of the Region's demographic and economic trends and its business competitiveness compared to three peer metropolitan areas. Complementing the quantitative data analysis is feedback gathered and compiled into a ***Regional Input Summary***.

II. ***Target Cluster Analysis.*** Identifies primary business sectors that have the highest probability of sustained success for the future of the Region's economy. The *Target Cluster Analysis* examines national trends and will build upon the work of the *Competitive Realities*.

III. ***Regional Vision Plan.*** Developing the *Plan* will bring together all subsequent project deliverables and will provide a blueprint for the Region's future actions. The *Plan* will address targeted business clusters, entrepreneurship, improving factors that affect business competitiveness, and leveraging regional partnerships.

IV. *Implementation Plan.* Effective implementation is critical to the ultimate success of the *Regional Vision Plan.* The Steering Committee and *Market Street* will work together to designate lead organizations, provide program assessments, determine funding reallocations, establish timetables, and recommend marketing and communication approaches.

METHODOLOGY

The *Regional Vision Plan* for the Piedmont Triad Region will only succeed by incorporating the full gamut of regional stakeholders in the strategic development process and ensuring that their needs and visions are addressed. *Market Street Services* employed multiple strategies to include as many community members in the process as possible. The following methods were used to solicit community input:

- *Market Street* conducted over 30 individual interviews with key economic development partners. Interviews were held across the Region and included people involved with private businesses, regional organizations, public school systems, higher education, elected government positions, charitable organizations, and other economic development entities.

- *Market Street* facilitated nine focus group meetings, where many individuals from similar backgrounds were invited to participate in open discussions regarding the future of the Piedmont Triad Region and key issues that need to be addressed.

- *Market Street* developed an online survey that was open to everyone for participation. The survey was accessed through the *Regional Vision Plan* website and successfully attracted over 1,100 responses.

The following sections describe the input collected by the multiple community stakeholders.

Focus Groups and Interviews

FOCUS GROUPS AND INTERVIEWS

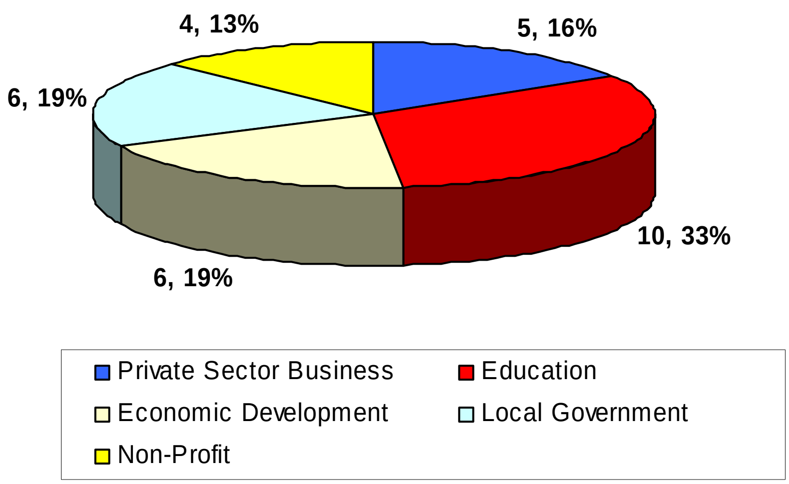
Interviews and Focus Groups for the Piedmont Triad's *Regional Vision Plan* were conducted during the week of December 13-17, 2005. As shown in the next table, 31 people participated in individual interviews conducted in locations across the Piedmont Triad Region.

Number of Interviewees by Location

Location	Number
Greensboro	6
High Point	3
PTP Offices	8
Wentworth	4
Winston-Salem	9
Yadkinville	1

The next chart summarizes the affiliation of the 31 interviewees. The greatest number of interviewees worked in Education (ten, or 33 percent), and the smallest group was interviewees who work in Non-Profit (four, or 13 percent).

Affiliation of Interviewees by Number & Percentage



In addition, nine Focus Groups for the *Regional Vision Plan* were held in the Piedmont Triad Partnership offices with various levels of participation from the following groups:

- ☑ Economic Developers Advisory Council (EDAC);
- ☑ Chamber of Commerce Executives;
- ☑ Community College Presidents;
- ☑ Host/Tourism/Convention and Visitor's Bureau;
- ☑ Arts;
- ☑ Entrepreneurs;
- ☑ Entrepreneurial/Small Business Service Providers;
- ☑ Life Sciences; and
- ☑ Non-profits.

Summarized comments from Focus Group and Interview participants follow. "Top Issues" given by Focus Group and Interview participants are also included. The feedback summarized here, in addition to other comments gathered during the community input process, will be used to inform subsequent deliverables.

Labor Quality and Availability

- Qualified engineers are hard to find in the Region. Employers recruit engineers from other Southeast, U.S. (California, Texas, and Boston) and international locations.

- Many feel that it is hard to attract professional workers to the Region. Some employers have to pay a premium to attract talented professional or technical workers.

- Skilled mechanical and technical workers are in short supply across the Region.

- There is an ample supply of semi-skilled and unskilled workers available throughout the Region. However, many of these workers need retraining and reinforcement of basic math and reading skills.

- Most feel that it is hard to attract young creative people here. The attractiveness of bigger markets and cities results in a lack of young people.

- A few mentioned that Dell and Federal Express will create competition for the labor pool of existing companies, thus making it harder to retain workers.

- For the right opportunity, people will come. The Region needs something to attract young people. A positive is that the Triangle is so close that the risk of losing one's job in the Triad area is mitigated by the nearby job market of the Research Triangle area.

- Most feel that the Region's workers have a strong work ethic.

- There is a shortage of Registered Nurses and Pharmacists in the Region. Clinical Research Associates are especially scarce.

- Most agreed that the Triad has a readily available workforce with competitive wage rates.

Workforce Development, Education, and Training

- Most feel that adults with low skills tend not to go back to school.

- Some indicated that the quality of technical and engineering programs offered at the area's universities are of poor quality.

- The most common reason cited by employers for losing candidates is the education system in the Region, particularly the unattractiveness of the K-12 system. K-12 education needs improvement and determination for excellence. Improving K-12 education will improve the Region's economy and future.

- Universities are developing programs in a "vacuum" and are not involving employers or soliciting their input.

- Four universities in the area (with the exception of Wake Forest) are "young" in developing their research capacity.

- Most feel that there is a need to communicate to current and future workers that most technical jobs do not require a four-year degree.

- Universities need to get out from "behind the moat" and collaborate more. Students need to relate and interact with the real world.

- Some indicated that the universities have assets – but they continue to be disparate.

- Some would like to see a co-op program through the universities that is financed by schools or local governments.

- Community colleges need to share resources – there are huge turf battles that hurt the Region.

Business Climate

- Many feel that the Region has a friendly business climate.

- Some feel that the cities are cooperative, but the counties are a "political mess."

- There is a need to encourage farming and new kinds of farm models via marketing and "selling a lifestyle."

- Some degree of entrepreneurship is alive and well in the Region—certain entrepreneurs are able to make their inventions a reality.

- Some feel that a strong entrepreneurial culture exists in High Point and it is changing in the Region.

- Most entrepreneurs and small employers will be hiring fairly substantially in 2005 and will pull employees from all over the Region.

- Several indicated that the Region's comparative advantages are:
  - Central location;
  - Affordability;
  - Air service to other cities;
  - Cost competitive; and
  - Great infrastructure for professional services.

- Some interviewees feel that lifestyle businesses could be developed in the Region.

- There is a lack of importance and resources placed on small business by government and the media.

- The Region is fertile ground for entrepreneurs due to job losses at the big factories.

- There is a need for more access to capital in early stages of venture funding.

- There needs to be some small business success stories and an awareness of the services offered to them.

- Some noted that unfortunately, angel investors are seasoned managers, NOT entrepreneurs.

- Participants indicated a lack of broad support for small businesses. Some noted that it is difficult to coordinate all small business; it is very fragmented.

- Hospitals are not being fully integrated or utilized for health sciences industry. There needs to be mechanisms to finance health care products manufacturers.

- Several mentioned the need to diversify corporate leadership – not many corporate leaders are Black or Asian.

- A few indicated that wineries can promote farming to children in the schools – perhaps the industry is too new in the Region.

- The area is fast becoming a hub of Hispanic buying for entertainment and shopping.

- Some feel that the Hispanic community is mostly engaged in small businesses in the service sector (stores and restaurants).

- Many feel the Region is unprepared for the growth in the Hispanic population, in terms of services, schools, and the Region's minimal literacy in Spanish.

- Some feel that there is very little interaction between the English and Spanish speaking community. There is a feeling that 90 percent of the Hispanic community is labor originally from Mexico. They send money back home and do not necessarily feel at home in the Region. The other 10 percent are professional and are from Ecuador and Argentina; they are more outspoken and engaged in civic activities. Many feel that this translates into an issue of the working class majority being represented by the professional-class minority.

- Several mentioned that the issue of undocumented Hispanic workers in the Region is marginalized. Community colleges are now accepting undocumented students, but they have to pay out of state tuition.

Tourism

- Some indicated that the Region has an interest in outdoor recreation, but more coordination and integration of assets is needed. Others added that the Region has a well-heeled demographic with a wide range of interests that can take advantage of growing momentum in this area.

- *Market Street* heard that there is a large potential for small businesses and crafts, but activity is just beginning.

- Several agreed that there has to be more places to stay and eat in order for heritage tourism opportunities to develop in communities in the Region. There needs to be more places to stay to attract overnight visitors (i.e. 15 percent of overnight visitors to the zoo are from out-of-state).

- The Region has more outdoor recreation assets in this area than Charlotte or Raleigh; fragmentation is preventing the Region from taking full advantage of it.

- Most indicated all of the Region's tourism and recreation assets (zoo, lakes, rivers, trails, etc.) can serve as an integrated economic engine.

- The Region needs to promote its tourism and recreation assets more – people do not know about them.

- A few participants mentioned that the lack of alcohol is an issue in some of the counties in the Region. An example was given that people from Greensboro will not open restaurants in outlying areas that do not serve alcohol.

- The Region needs to bolster its film presence – participants mentioned that the Region has the right look and a strong crew base (people who work behind the scenes or as freelancers).

- Several agreed that film can be used to attract young professionals – there is an abundance of local studio space and advertising agencies. All cities in the Region should contribute money to promoting film – at least a third of film production stays in the Region.

Quality of Life

- Many indicated that close proximity to a great deal of cultural and recreational amenities is a positive for the Region.

- Outdoor recreational activities and the Region's climate are major strengths. Most are satisfied with the quality of life in the Region. Others added that the Region is a good place to raise a family due to the educational and cultural assets.

- The Region needs to link conservation to the arts. And it needs to leverage the talent, breadth, and quality of local artisans and musicians. The arts are not marketed; "We have it all here" when it comes to the arts.

- The Region's "hidden treasures" include media, film, music, dance, theatre, visual arts, glass, pottery, painting, and museums.
- There is a need to leverage the opportunity to make the Region an "arts destination."
- The arts are difficult to showcase—"nothing seems to be open on Sundays, and few shops are open after 5pm."
- A few feel that there is a lack of quality arts programs for children.
- Most feel that students are prepared once they leave—the trick is to get them back.
- The Region needs to increase development of heritage tourism opportunities and reach out to retirees.
- Regional marketing efforts should embrace Southside Virginia as a draw for tourism in the Region.
- The Region needs to create marketing "sub-regions" for tourism – each area of the Triad has its own unique assets.
- The Region needs a Regional strategy to attract and retain the creative class – look at Austin.
- "Our community is progressive – there is something for everybody."
- The Region needs to pay attention to its air quality.

Infrastructure

- Many feel that the Region's transportation infrastructure is unparalleled and its potential needs to be leveraged more.
- There needs to be more financial support for new ventures. There needs to be more than the two Angel funds that are in the Region.
- There is a shortage of wet lab space in the Region.
- Airlines should be more consistent in welcoming passengers to the Piedmont Triad Airport rather than calling it Greensboro Airport.
- The airport needs to offer direct flights to places that matter.

- The transportation network is outstanding – the Region is centrally located.
- The Region is a hub, a nexus, and a gateway, right in the middle of two major East Coast markets (Washington, D.C. and Atlanta).
- There is a need to address transit in a unified way.

Economic Development Resources

- A few mentioned that Regional marketing should include packages with hotel, restaurants, and other activities.
- Many feel that elected officials are supportive of regional efforts.
- Most indicated that entrepreneurial efforts need to be coordinated.
- Some indicated that economic development efforts in the Region do not adequately value farming.
- Most indicated a lack of coordination among the three cities. There is a degree of paternalism when it comes to Winston-Salem and High Point. There is a need to move from a paternalistic model to corporate models in the non-profit arena.
- Need industry roundtables and quality mentoring programs.
- The Region needs to be willing to experience "change" and "pain" and stop "beating around the bush."
- A few mentioned that there is no room for schools to grow – certain schools are land-locked. There is an unwillingness to raise taxes to address this issue.
- Several mentioned that the Region needs results from the Chambers and economic development groups – not just activity indicators of momentum.
- Many indicated that there needs to be a small business and retention strategy at each level of economic development. The energy is there, just no capacity.
- The Region needs to stop "splitting the process from the beginning" and establish trust and relationships.
- Several expressed resentment with cities claiming projects and not the Region (i.e. FedEx).

- What is connected to all the activity in terms of economic development? What are the results?
- Some mentioned educators traveling by themselves to companies in other parts of the country to promote their schools and the Region. Those participants also said that local economic developers do not understand the educational piece.
- The pressure is mounting for Triad cities to create jobs.
- More internal marketing and positive success stories from the Triad are needed.
- Several mentioned that the Region is a design center and the community could better utilize the arts center and the design cluster.
- Let's not compete with the Triangle, let's partner with it.
- There is a need to measure what biotech is and is not for the Triad.
- Having two separate council of governments (COGs) is a weakness.
- Need this effort to address economic development at the sub-regional level – not all parts of the Region function alike.

Summary of "Top Issues" Given by Interview and Focus Group Participants

- ✓ "Huge void in leadership – county commissioners not willing to move forward."
- ✓ "Need more youth in leadership positions."
- ✓ "Land use planning has to be a high priority."
- ✓ "Need to create environment to harness the potential to create new companies."
- ✓ "Has to be more coordination among economic development entities."
- ✓ "Efforts to share resources have to be more coordinated and unified."
- ✓ "The Region is constantly improving its image and brand."

- ✓ "Perception of our ability to move away from solely manufacturing will be a key regional driver."
- ✓ "We need some 'wins,' new leadership, and new wealth in the community."
- ✓ "Some in Region want a quick fix, they need to be patient and have direction."
- ✓ "Our multiple cities need to learn to play together."
- ✓ "Our Region is a 'stepping stone to somewhere else.'"
- ✓ "Need to 'market Triad within the Triad' and 'grow our own.'"
- ✓ "'It takes more than you'" attitude needed.
- ✓ "Film production in State dwindling – big studio features are now filming in areas that offer incentives and tax breaks. We need to support film incentives to pass in next legislative session."
- ✓ "Regional funding and support for film is needed– others in North Carolina do. Leverage the Region's schools and talent."
- ✓ "North Carolina is getting more competitive – need to further leverage State programs."
- ✓ "The airport should be called the 'Piedmont Triad Airport.'"
- ✓ "We need to plug the creative class in to the Region."
- ✓ "The Triad is close to just about everything."
- ✓ "K – 12 public education is a weakness."
- ✓ "We need to keep what we have – prevent loss of people and businesses."
- ✓ "Our governments aren't cooperating."
- ✓ "We need to diversify the leadership base and bring younger people and minorities into leadership. We're not going to see much progress until that 'nut is cracked' and the entrenched power structure becomes more inclusive."
- ✓ "If we reduce the university's role to strictly job training, we're not going to get where we need to go."

- “There is something for everyone here—regardless of life style—at an affordable cost of living.”
- “There is one thing missing in the Triad – core leadership.”
- “We need to pull together resources and decide who has what (i.e. a Triad Symphony).”
- “Work to change the perception of ‘old, tired manufacturing economy.’”
- “We need our community to value education.”
- “We need to get people here to realize what they have.”
- “We have tremendous potential, if people are willing to change.”
- “We need to secure venture capital for companies in the Region.”
- “Let’s not reinvent the wheel with this plan – let’s promote ourselves as the ‘Triad.’”
- “Not a lot of vision – a lot of scrambling.”
- “We need incentives for the arts (i.e. bed tax).”
- “There is an aversion to conflict here.”

NORTH CAROLINA'S
Piedmont Triad
GREENSBORO WINSTON-SALEM HIGH POINT

Online Survey

ONLINE SURVEY

To reach as wide of an audience as possible, an online survey was posted on the *Regional Vision Plan* website (www.piedmonttriadvision.com). The survey was open for one month (December 17, 2004 to January 17, 2005) for anyone to participate. It was promoted using a press release, emails sent to key stakeholder groups, and by word of mouth. The promotional efforts succeeded in attracting 1,147 respondents to participate.

Participants were asked questions about themselves, their place of employment, as well as questions about the competitiveness of the Piedmont Triad Region. Questions about the Region's competitiveness addressed the economic and community climate, education and workforce skills, infrastructure, business costs and business environment, quality of life, and regional cooperation, as well as the Region's strengths and challenges. Respondents were given the opportunity to enter additional comments on each of these aspects.

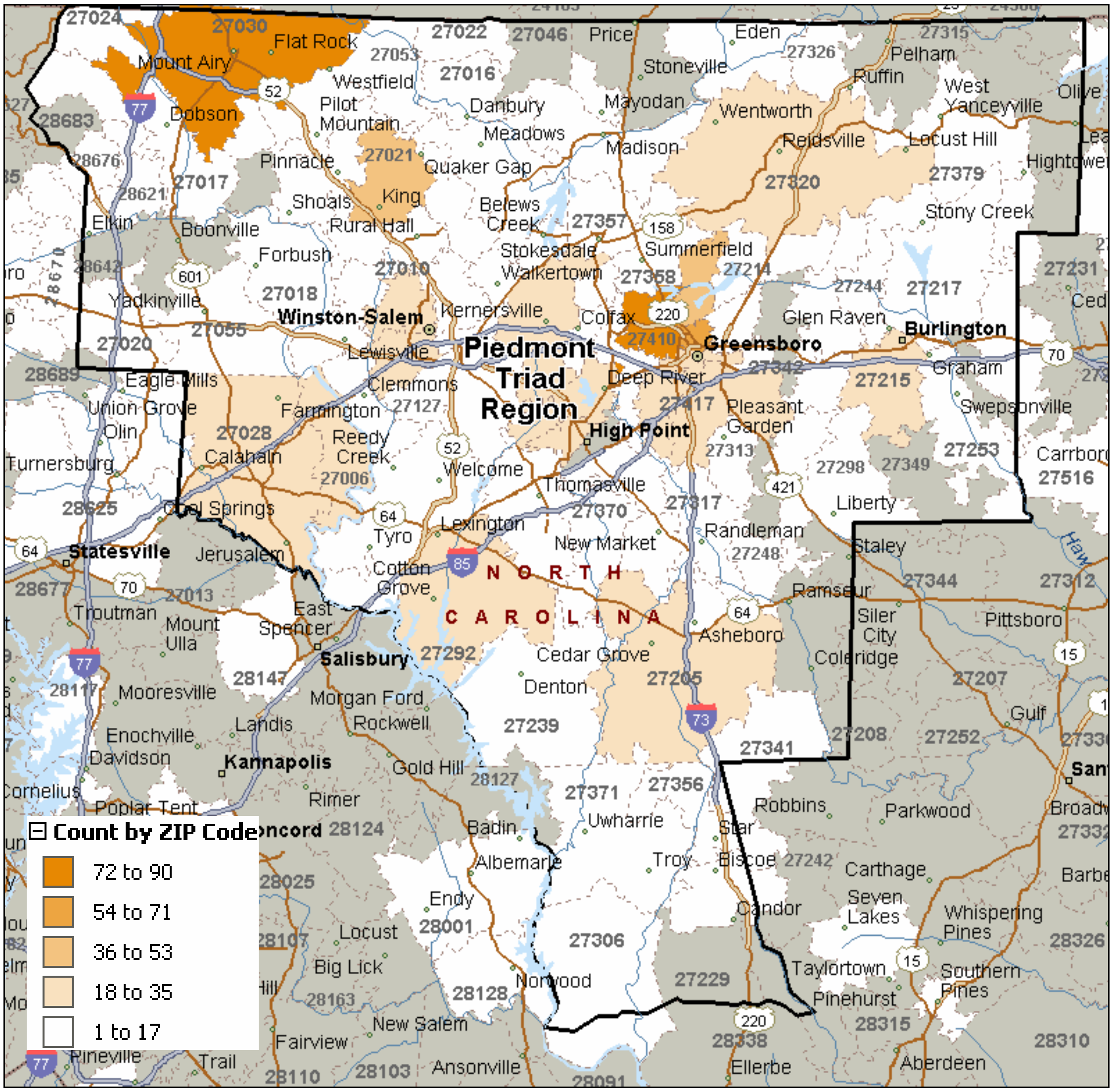
Respondent Information

Respondents were asked questions about themselves.

1. What is the zip code of your primary residence?

The following map shows the number of respondents by their zip code of residence. The highest concentrations of respondents are from the Mount Airy and Greensboro areas; although there is representation from all of the counties in the Piedmont Triad Region. A few respondents live outside of the mapped area, although in small numbers.

Number of Survey Respondents by Zip Code



The following table shows the number of survey participants by county. Guilford County had the greatest participation, followed by Forsyth and Surry Counties. Only a few people participated in the survey from Caswell, Montgomery, and Yadkin Counties.

Number of Survey Respondents by County

County	Number of Respondents	Pct of Respondents
Alamance	33	3%
Caswell	4	0.3%
Davidson	67	6%
Davie	50	4%
Forsyth	172	15%
Guilford	408	36%
Montgomery	11	1%
Randolph	92	8%
Rockingham	50	4%
Stokes	75	7%
Surry	131	11%
Yadkin	9	1%
Piedmont Triad Region Total	**1,102**	**96%**
Outside of Region	**42**	**4%**

2. What is your age?

	Response Percent	Response Total
Less than 20 years of age	0.3%	3
20-25 years of age	2.9%	33
25-30 years of age	6.5%	74
30-35 years of age	9.2%	106
35-40 years of age	9.9%	113
40-45 years of age	14.0%	161
45-50 years of age	14.1%	162
50-55 years of age	**18.4%**	**211**
55-60 years of age	14.1%	162
60-65 years of age	6.5%	75
65-70 years of age	2.4%	27
70-75 years of age	1.1%	13
Over 75 years of age	0.5%	6
	Total Respondents	**1146**
	(skipped this question)	**0**

The largest proportion of respondents are 50 to 55 years of age (18.4 percent), and 60.6 percent of the respondents are between the ages of 40 and 60.

3. What is your employment status?

	Response Percent	Response Total
Employed	**93.4%**	**1070**
Unemployed, looking for work	0.5%	6
Not looking for work	1.0%	11
Student	1.0%	11
Retired	4.2%	48
Total Respondents		**1146**
(skipped this question)		**0**

Most respondents (93.4 percent) reported being employed.

Company Information

Respondents were asked questions about the companies they work for.

Part 1

1. What is your role in your company?

	Response Percent	Response Total
Owner	17.5%	186
President/CEO	17.7%	188
Manager	**31.7%**	**336**
Staff	26.0%	276
Other (please specify)	12.6%	134
	Total Respondents	**1061**
	(skipped this question)	**85**

The survey attracted respondents at various levels of leadership in their workplaces, with the greatest percentage being managers (31.7 percent). The top ten specified responses under "Other" are listed below.

Other Responses	Number	Pct of Total Responses
Director or Executive Director	18	1.7%
Vice President	18	1.7%
Sales	10	0.9%
Independent Consultant or Contractor	9	0.8%
Broker or Agent	8	0.8%
Partner or Managing Partner	7	0.7%
Business Owner	5	0.5%
Financial Advisor or Financial Planner	5	0.5%
Attorney	4	0.4%
Department Head	4	0.4%

2. What is the ownership of your company?

	Response Percent	Response Total
Sole ownership	9.7%	103
Partnership	8.0%	85
Corporation	**48.6%**	**515**
Don't know	2.3%	24
Other (please specify)	31.4%	333
	Total Respondents	**1060**
	(skipped this question)	**86**

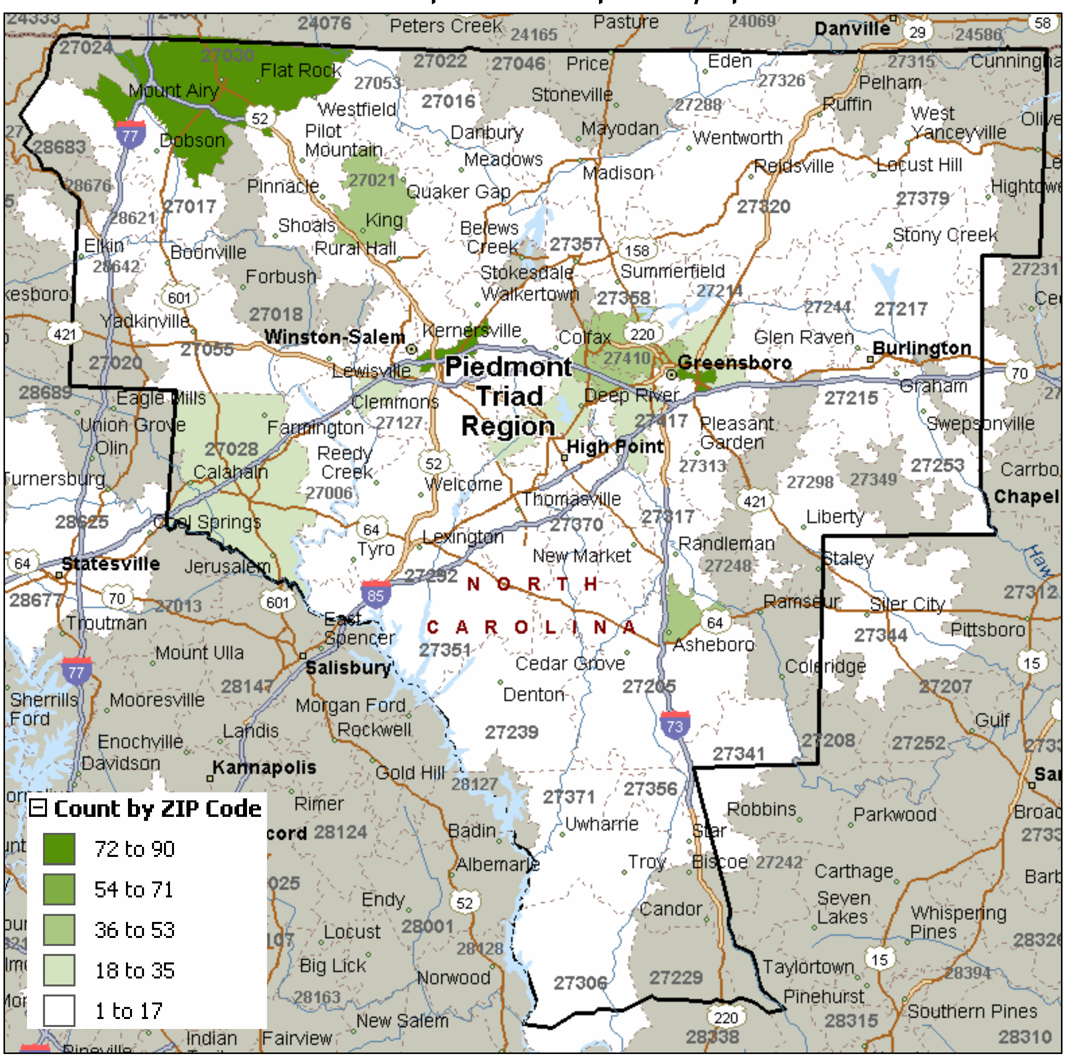
Nearly half of the respondents work for a corporation. Many respondents did not choose one of the available choices and instead wrote in their answers. Most written responses showed that respondents worked for the government (state, local, county, etc.), a non-profit organization, or a school system (K-12 and higher education).

Part 2

1. What is the zip code of your company's primary location?

The following map shows the number of companies by the zip code of their primary locations. The greatest concentrations of companies are located near Greensboro, Winston-Salem, and Mount Airy. A few firms are outside of the mapped area, although in small numbers.

Location of Respondents' Companies by Zip Code



The following table shows the number of respondent companies by county. Guilford County had the greatest participation, followed by Forsyth and Surry Counties. Only a few of the respondents' companies were located in Caswell, Montgomery, and Yadkin Counties.

Location of Respondents' Companies by County

County	Number of Respondents	Pct of Respondents
Alamance	27	3%
Caswell	5	0.5%
Davidson	46	4%
Davie	37	4%
Forsyth	173	17%
Guilford	370	36%
Montgomery	15	1%
Randolph	76	7%
Rockingham	41	4%
Stokes	63	6%
Surry	101	10%
Yadkin	9	1%
Piedmont Triad Region Total	**963**	**94%**
Outside of Region	**63**	**6%**

2. How long have you worked at your current place of business?

	Response Percent	Response Total
Less than one year	10.4%	108
1 - 3 years	**21.2%**	**220**
3 - 5 years	17.0%	176
5 - 10 years	19.5%	202
10 - 15 years	11.5%	119
15 - 20 years	7.6%	79
20 - 25 years	5.1%	53
Over 25 years	7.5%	78
Doesn't apply to me	0.2%	2
Total Respondents		**1037**
(skipped this question)		**109**

The majority of respondents (57.7 percent) reported being at their company for between one and ten years, with the greatest percentage (21.2 percent) having worked at their company for one to three years.

3. How would you characterize your company's type of business?

	Response Percent	Response Total
Accomodation and food services	1.8%	19
Administrative services and waste services	0.3%	3
Arts, entertainment, and recreation	1.6%	17
Construction	2.8%	29
Education services	11.0%	114
Health care services	3.9%	40
Finance and insurance	10.2%	106
Government	10.5%	109
Information (media, publishing, broadcasting, data processing)	2.3%	24
Manufacturing	6.0%	62
Professional and technical serivces (legal, accounting, engineering, design, scientific research, advertising, computer services)	11.5%	119
Real estate	7.9%	82
Retail trade	2.4%	25
Transportation and warehousing	0.2%	2
Wholesale trade	1.0%	10
Non-profit	**14.0%**	**145**
Other (please specify)	12.6%	131
	Total Respondents	**1037**
	(skipped this question)	**109**

A significant proportion of respondents reported working for non-profit institutions, government, and educational services. Others worked in private, for-profit industries: finance and insurance, professional and technical services, manufacturing, and real estate. A number of respondents did not choose one of the available choices and instead wrote in their answers. Many of the written responses showed that respondents' companies were in service-based sectors. A few responses that appeared multiple times were: Economic Development or Tourism, Utilities, and Pharmaceutical, Biotechnology, or Biopharmaceutical.

4. How many employees work at your place of business?

	Response Percent	Response Total
Fewer than 10	**36.8%**	**382**
10-49	25.9%	269
50-199	20.6%	214
200-499	6.8%	70
500-1000	3.8%	39
Over 1000	5.5%	57
Don't know	0.6%	6
	Total Respondents	**1037**
	(skipped this question)	**109**

Most respondents work for small companies; nearly 40 percent have fewer than 10 employees at their place of work, and 62.7 percent have fewer than 50 employees.

5. How many employees work for your company at all of its locations?

	Response Percent	Response Total
Only have 1 location	**31.6%**	**328**
Fewer than 10	5.1%	53
10-49	12.9%	134
50-199	13.8%	143
200-499	10.5%	109
500-1000	6.4%	66
Over 1000	16.8%	174
Don't know	2.9%	30
	Total Respondents	**1037**
	(skipped this question)	**109**

Although many respondents (31.6 percent) work for companies that have only one location, the respondents whose companies have multiple locations work for both large (16.8 percent with more than 1,000 employees) and small (18.0 percent with fewer than 50 employees) organizations.

6. How many years has your company been in business?

	Response Percent	Response Total
Less than 5	11.9%	123
5-14	17.8%	185
15-29	18.3%	190
30-50	17.1%	177
More than 50	**32.3%**	**335**
Don't know	2.6%	27
	Total Respondents	**1037**
	(skipped this question)	**109**

Those who work for established businesses made up the largest proportion of respondents; 32.3 percent of respondents work for organizations that have been in business for more than 50 years.

7. Which choice below best characterizes the market / service area of your company?

	Response Percent	Response Total
One county	**21.7%**	**225**
Multi-county area	21.3%	221
Piedmont Triad Region	14.1%	146
North Carolina	8.8%	91
South Atlantic United States	6.2%	64
Eastern United States	4.2%	44
Midwestern United States	0.2%	2
United States	8.2%	85
North America	2.6%	27
Global	13.8%	143
Don't know	0.3%	3
Other (please specify)	3.5%	36
	Total Respondents	**1037**
	(skipped this question)	**109**

Although a significant number of respondents reported that the market or service area of their company is just one county (21.7 percent), the majority (79.4 percent) cited even larger geographic areas as their market. Both the global market (13.8 percent) and multi-county areas (35.4 percent, including the Piedmont Triad Region) are important market or service areas to respondents' companies. A few respondents did not choose one of the available choices and instead wrote in their answers. Some of the written responses included: a city or municipality, or multiple Southeastern states.

Piedmont Triad Region's Competitiveness

Respondents were asked to rank aspects of the Piedmont Triad Region's community and business environment based on their experience in the area. They were given the opportunity to write additional comments after each section. The bolded numbers represent the rating that received the greatest number of responses.

1. Economic and Community Climate in the Piedmont Triad Region

	Excellent	Good	Average	Below average	Poor	Don't know
Overall strength of the local economy	1%	25%	**44%**	24%	5%	0%
Opportunities to earn sufficient wages to meet daily needs	1%	21%	**45%**	27%	6%	0%
Availability of local jobs	0%	14%	**39%**	35%	10%	1%
Opportunities to start your own business	6%	33%	**38%**	14%	4%	5%
Job opportunities in manufacturing fields	1%	6%	24%	**35%**	27%	6%
Job opportunities in non-manufacturing fields	1%	21%	**47%**	24%	4%	4%
Job opportunities in high tech fields	2%	19%	30%	**33%**	11%	5%
Job opportunities in a skilled trade	2%	26%	**43%**	20%	4%	5%
Job opportunities in health care fields	22%	**49%**	20%	5%	1%	3%
Opportunities to work close to where you live	8%	31%	**34%**	19%	7%	1%
Likelihood you will continue to live in the community	**45%**	35%	13%	3%	3%	1%
Likelihood you will retire in the community (choose "Excellent" if you've already retired in the community)	27%	**35%**	18%	8%	9%	4%
Likelihood you will raise children in the community (choose "Excellent" if you've already raised children in the community)	**56%**	21%	8%	3%	7%	5%
Likelihood your children (once grown) will want to live in the community (choose "Excellent" if any grown children already live in the community)	16%	18%	**24%**	16%	17%	9%
Chances that life in the community will improve	18%	**47%**	25%	6%	2%	1%
					Total Respondents	**863**
					(skipped this question)	**283**

Although many respondents perceive the strength of the local economy to be average (44 percent), most want to remain in the community and raise their children there. They are optimistic about the future, but they are not as sure that their children will stay in the community.

Respondents are pessimistic about the availability of local jobs. Less than one percent rated this as excellent, while 45 percent rated this as below average or poor. They were much more pessimistic about job opportunities in manufacturing fields than non-manufacturing fields.

2. Additional Comments – Selected Responses (148 total)

- Great place to live and work, but opportunities for young, educated professionals is limited.
- It's a challenge to imagine 'the product' that the Piedmont Triad *uniquely* offers.
- Deteriorating natural environment will inhibit quality of life.
- Quality of life is generally good. The citizens of this region, however, expect corporate largesse to provide the amenities that we have all enjoyed in the past. This will not occur in the future, so citizens will have to adjust to this reality and decide how they will achieve these amenities in the future.
- Starting to make the tough transition but the 'culture of business' in the Triad is still lethargic relative to even the Triangle. The energy just isn't there to build or attract young companies or young educated people.
- Lack of unified leadership that understands the average citizen, poorly planned roads and communities, political infighting, second rate city council - we are far from being a world class community.
- The Triad is an excellent place to live - reasonable costs, great location, great climate, and great atmosphere. As for business, I believe we will see an improvement in the business climate, but a struggle to overcome the slumping manufacturing sector. I believe the joint cooperative business development initiatives are excellent, and will result in major payoffs.
- With Fed Ex and Dell poised to start their local operations, our economy should be excellent in about four years. [*Multiple positive responses for Federal Express and Dell.*]
- Typically, approximately two-thirds of the present residents travel outside the County for employment. I see a need to retrain employable individuals as we make the transition from a tobacco based County to an alternate source for agriculture. [*Multiple comments about having to commute outside of county to find work.*]
- Many job opportunities were lost due to plant closings in our community. However, some high tech jobs have become available but the workforce for those jobs does not exist. The population needing employment does not have the skills needed to perform these high tech jobs.
- Speaking from a minority prospective: Jobs and business development are for African Americans continue to be lacking and non-inclusive in the overall planning for Economic Development, particularly, in Greensboro, Guilford County. Notice my response of your last statement—'Chances that life...will

improve. I'm sure it 'can' if we are earnestly inclusive in our provisions to make it happen for all.

- While the Piedmont Region has undergone significant losses in manufacturing, it is poised to benefit from its excellent quality of life and transportation infrastructure with the advent of new technology and life sciences business.
- Growth/suburban sprawl is uncontrolled, with little vision on the part of leadership towards the future.
- The education in our public schools systems needs to be improved for our children to have a better chance at a better wage.

It is interesting to note that 24 percent of the comments referred specifically to the respondent's county or city, indicating that a significant number of the respondents view their community as being their city or county rather than the entire Piedmont Triad Region.

3. Education, Workforce, Skills in the Piedmont Triad Region

	Excellent	Good	Average	Below average	Poor	Don't know
Quality of the workforce	5%	**45%**	37%	11%	1%	1%
Availability of the workforce	10%	**50%**	31%	7%	1%	1%
Quality of elementary and secondary schools	6%	**39%**	35%	13%	3%	4%
Quality of four-year universities	39%	**43%**	12%	2%	2%	3%
Availability of four-year universities	**45%**	37%	11%	3%	3%	2%
Quality of community colleges	**43%**	40%	12%	1%	0%	3%
Availability of community colleges	**51%**	35%	10%	1%	1%	2%
Quality of job training/continuing education	26%	**47%**	18%	4%	1%	5%
Availability of job training/continuing education	29%	**43%**	20%	4%	1%	4%
					Total Respondents	**863**
					(skipped this question)	**283**

About half of the respondents rated the quality and availability of the workforce as good, and most perceive the quality and availability of job training and continuing education to be good or excellent. Their view of higher education institutions in the Region (universities and community colleges) is quite favorable, but respondents are more pessimistic about the quality of K-12 schools.

4. Additional Comments – Selected Responses (106 total)

- Education facilities are a drawing card for this area, especially the universities.

- Public education in the area at the elementary and secondary levels needs much improvement. The community colleges are extremely important to our future as we transition from manufacturing jobs to more diverse employment opportunities.
- While educational opportunities are abundant in the area, I feel that people take advantage of them to give them the means to leave the area.
- High school system is poor across the region. I've had any number of people turn down my organization because of the quality (or lack thereof) of the high schools in the region.
- Piedmont Triad Community Colleges are our major assets for job training and continuing education. [*Multiple positive comments regarding community colleges.*]
- Engineering schools are far between.
- This Region is one of the best equipped with educational institutions and training availabilities. From a business perspective, coordination of training, education and development programs needs some improvement.
- Quality and availability of the workforce are below average because the available workforce needs to be re-trained for our service vs. manufacturing, economy.
- We do not use our local universities staff and resources to their fullest. Most students move away and on to better and more interesting communities.
- I feel that we possess a very talented and dedicated workforce. The biggest problem that I see is with the lack of portability of the training most of the local workforces possess. Most have been trained within the element of textiles, furniture, etc. and although it was sufficient for the performance of their jobs it may not be sufficient to acquire the next new job that is available to them.
- One thing that is needed is more trade school classes on the high school level. Also more basic education is needed, as many employers have to give basic education to promising employees, many have a hard time even filling out job application forms.
- There are insufficient graduate programs to support one of the new economic engines: healthcare research.
- Educational opportunities are available, but are spotty, poorly coordinated, and in some cases, tangential to the needs of a technology, skill driven economy.

5. Piedmont Triad Region Infrastructure

	Excellent	Good	Average	Below average	Poor	Don't know
Condition of highways and roads	10%	**48%**	32%	8%	3%	0%
Accessibility and adequacy of highway and road network	17%	**46%**	27%	7%	2%	0%
Public transit	2%	11%	26%	**33%**	22%	8%
Railways	1%	12%	27%	**27%**	21%	12%
Accessibility of air transportation	16%	**42%**	32%	7%	2%	1%
Availability of land-line and cellular phone services	22%	**47%**	23%	6%	1%	1%
Availability of Internet and cable services	25%	**45%**	22%	6%	2%	0%
Capacity of water/sewer	13%	**38%**	29%	13%	4%	4%
Energy supply	19%	**47%**	27%	3%	0%	4%
Library system	17%	**45%**	29%	5%	1%	2%
Fire services	24%	**51%**	20%	1%	0%	3%
Police services	18%	**51%**	25%	3%	1%	2%
Public parks and recreational areas	24%	**41%**	23%	9%	3%	1%
					Total Respondents	**863**
					(skipped this question)	**283**

For the most part, many residents perceive the Region's infrastructure as being good. However, the Region received below average and poor rankings for its public transit and railway systems, and there is notable concern about the capacity of water and sewer systems.

6. Additional Comments – Selected Responses (94 total)

- Road and highway improvement is too often delayed; in major cities, road crews are more efficient and cost effective. Water and sewer capacity in rural areas remain a problem. There is overload in certain areas, as Wendover and not enough infrastructure in Southeast and Eastern. Too much monopoly of energy and cable resources.
- Trails and alternative pedestrian and bicycle routes are very important to me and to the community. [*Multiple comments regarding the need for trails and greenspace.*]
- Rural cellular and internet access is POOR. [*Multiple comments regarding the lack of cellular service and high-speed internet in rural areas.*]
- Capacity of water and sewer is superior but availability, outside of the municipalities is a major drawback. It is recognized but needs to be solved, working with different governments is a necessity.
- Specific comments: 1) Public transport is almost non-existent BUT vital for our disabled, poor and senior citizens. 2) Access to public air transport is limited to PTIA. 3) WATER must be the Number One Priority among all cities and towns, whether they have it to sell or they need to buy it! 4)

WASTEWATER is next. 5) SOLID WASTE is the third-most challenge for our region. [*Multiple comments regarding the need for accessible public transportation.*]

- The larger counties have a better offering of infrastructure than those smaller counties who either can't afford or are forced to make choices that are not as progressive as their counterparts. Most of the smaller counties are trying to maintain essentials rather than devoting monies to promote future possibilities. I do think that with the assistance of local economic development partnerships more attention is being paid to the lack of infrastructure within a county and what can be done to improve.
- Good infrastructure equals good quality of life. More focus on city planning that forms a cohesive, well-thought out city with beautiful natural areas, readily available public transportation, and excellent communication opportunities (cellular phones and high speed internet) is a must. [*Multiple comments on the need for planning.*]
- Urban sprawl is making all of our problems worse - crowding our roads, putting jobs where there is no public transportation for the workforce, and requiring inefficient extensions of our infrastructure. Weak government leaders who cannot say no to anything any developer requests is making this happen. [*Multiple comments regarding the problem of urban sprawl.*]

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7. Business Costs and Overall Business Environment in the Piedmont Triad Region

	Excellent	Good	Average	Below average	Poor	Don't know
Affordability of labor	8%	**47%**	35%	3%	0%	7%
Affordability of land-line and cellular phone services	6%	37%	**45%**	6%	1%	4%
Affordability of Internet and cable services	6%	33%	**44%**	11%	3%	3%
Affordability of water/sewer	7%	34%	**43%**	9%	2%	6%
Affordability of energy	6%	35%	**49%**	5%	1%	4%
Benefits and insurance costs	1%	19%	**48%**	17%	9%	5%
Availability of commercial office space	12%	**42%**	26%	6%	1%	13%
Affordability of commercial office space	6%	34%	**35%**	7%	1%	17%
Availability of industrial office space	11%	**37%**	25%	5%	1%	22%
Affordability of industrial office space	7%	**32%**	29%	5%	1%	26%
Availability of land	10%	**39%**	32%	7%	1%	10%
Affordability of land	7%	29%	**35%**	11%	4%	13%
Business and corporate tax structure	2%	20%	**45%**	8%	4%	21%
State/local incentives	6%	28%	**33%**	13%	5%	15%
Economic development resources	7%	34%	**35%**	10%	3%	11%
Support and retention of regional businesses	3%	25%	**39%**	16%	6%	11%
Availability of bank loans	7%	**37%**	34%	6%	2%	15%
Availability of venture capital	2%	18%	**35%**	15%	5%	24%
Availability of research and development resources	5%	27%	**33%**	13%	3%	20%
Support for entrepreneurship, innovation, small business	8%	30%	**32%**	14%	6%	10%
Support for minority and women-owned businesses	5%	25%	**34%**	15%	5%	16%
Support for international trade	2%	20%	**31%**	15%	5%	26%
Ease of permitting process	1%	14%	**39%**	13%	7%	25%
				Total Respondents		**863**
				(skipped this question)		**283**

For the most part, respondents perceive business costs in the Piedmont Triad Region to be average to good. One area of significant concern is rising benefits and insurance costs. The availability of land and office space does not appear to be an issue.

Overall, respondents view the Region's business environment and support of economic development as rather average; these aspects received more below average and poor ratings than did business costs. The support and retention of regional businesses received more negative ratings, as did the ease of the permitting process, support for international trade, support for minority and women-owned businesses, and support for entrepreneurship, innovation, and small business. Although availability of bank loans was not a problem, the availability of venture capital was viewed by some as being poor or below average.

8. Additional Comments – Selected Responses (79 total)

- There is significant discrepancy among counties in the region.
- There remains disparity in support and financing of minority businesses. The long range success of these businesses is good for the community, but difficult because of little support.
- Why do minority and women-owned businesses continue to get more support? I am a White male business owner and have worked for 20 years to create banking relationships; They should have to do the same. I look forward to the day when everyone is treated the same.
- Comments above re: minority owned businesses is relevant here as well. We have started lots of programs and finished very few.
- Not enough support for local businesses for professional services, goods and other needed resources.
- Need to support entrepreneurial efforts much more.
- Basically, most local governments and building inspection departments are pro-business and relatively easy to deal with - hugely better than other North Carolina areas.
- Need to do more for existing business and make known what is available.
- Answers to many of these questions regarding availability and affordability of business services and costs will differ in the Piedmont for large vs. small businesses and for minority vs. non-minority businesses.
- These are all items that are getting better, and regional dialogue is increasing, but the current situation until it improves is below average in many areas.
- We have a non business friendly permitting process. Government employees tend to go out of their way to make building and development difficult. Out zoning ordinances are cumbersome and open to employee interpretation.
- Most of my business is conducted out of state so I have not looked into many of the local resources. I do get the impression however that the region is average on most accounts. There is no real draw to start a business in this area other than cheap labor. Not a good aspiration for a city to have.
- We have buildings and space, but current policies do not incentivize developers to rehab these appropriately (e.g., state-of-the-art internet wiring). Instead incentives are in place to build further and further out of the city limits, creating additional sprawl and further stress on transportation, parks, fire, police, library and other government services. Thus, we end up spending more as a community and losing out by not having attractive options for businesses to locate here.
- Feel that too much money is being spent on bringing in new business. Established, long term businesses do not get the same breaks.

9. Quality of Life in the Piedmont Triad Region

	Excellent	Good	Average	Below average	Poor	Don't know
Availability of health care	37%	**40%**	18%	4%	1%	0%
Quality of health care	35%	**41%**	19%	4%	0%	1%
Affordability of health care	5%	23%	**50%**	12%	8%	1%
Availability of child care	5%	30%	**37%**	7%	2%	19%
Quality of child care	4%	31%	**37%**	5%	1%	21%
Affordability of child care	3%	20%	**41%**	10%	4%	22%
Personal safety	13%	**55%**	29%	2%	0%	1%
Property safety	11%	**54%**	31%	3%	1%	1%
Cost of living	9%	**43%**	39%	7%	1%	0%
Availability of housing	14%	**51%**	29%	5%	1%	0%
Affordability of housing	9%	**42%**	36%	11%	2%	1%
Quality of air, water, and the environment	9%	**40%**	36%	11%	4%	0%
Cultural and entertainment amenitites	9%	**35%**	32%	18%	5%	0%
Diversity in the Region	8%	36%	**41%**	10%	4%	1%
Recreational opportunities	13%	**39%**	32%	12%	3%	1%
Shopping and dining opportunities	14%	**41%**	30%	11%	3%	0%
Civic engagement	11%	35%	**37%**	9%	3%	4%
				Total Respondents		**862**
				(skipped this question)		**284**

In many cases, the majority of respondents perceived various quality of life aspects to be good or excellent, particularly with health care, safety, housing, cost of living, and recreational and shopping opportunities. However, there is some concern about the quality of the environment, cultural activities, diversity, and the affordability of health care and child care.

10. Additional Comments – Selected Responses (82 total)

- Civic engagement is at a level other than 'regional.' We have 'poor' engagement at the regional level....this must evolve.
- Cultural offerings not promoted, thus giving the impression that they are either nonexistent, or exclusive.
- Health care is a major problem. It is not affordable unless you are in a large group. [*Multiple comments on the rising costs of health care.*]
- There are very few opportunities for young professionals in the area, whether they are single or married without kids. Universities can't keep the students here after graduation because the students learn there's nothing happening here - and no jobs.
- This is a unique area with an abundance of rural areas within a short distance of big city amenities.
- Homes are becoming more and more expensive. [*Multiple comments regarding increasing housing prices.*]

- This is an excellent area to live and raise families. The distances between the towns in this area are close enough to take advantage of numerous activities, restaurants, shopping, etc.
- The biggest problem with life in the region is its lack of an identity. Other cities are known for certain attributes. Most people outside of the state don't even know of the area mainly because we have not publicized our strengths nor grabbed on to an identity.
- My children have asthma. Our area has poor air quality. I am concerned that FedEx's planes will worsen our air quality.
- This Region has everything to offer. Located just a short drive to many recreational opportunities in both the Mountain Region and the Sandhills Region.
- We have diversity of the population; however, those diverse persons are not integrated well into the community and are not reflected in leadership.
- Excellent healthcare available in Winston-Salem - easily accessible for most people, but outlying rural communities have a fairly long commute for these services. Local emergency room/urgent care currently available but the future availability doesn't look good. Low-income, uninsured, rural residents are significantly underserved.

11. Overall ranking of the Piedmont Triad Region's economy and business environment:

	Response Percent	Response Total
Excellent	2.2%	19
Good	**45.2%**	**390**
Average	39.9%	344
Below Average	11.7%	101
Poor	0.9%	8
Total Respondents		**862**
(skipped this question)		**284**

Although the highest percentage of respondents perceive the Region's economy and business environment to be good (45.2 percent), only 2.2 percent rate this as excellent, and over 12 percent rated this as below average or poor.

12. Overall ranking of the Piedmont Triad Region's quality of life:

	Response Percent	Response Total
Excellent	18.0%	155
Good	**56.6%**	**488**
Average	21.2%	183
Below Average	3.9%	34
Poor	0.2%	2
	Total Respondents	**862**
	(skipped this question)	**284**

Nearly three quarters of respondents believe that the quality of life in the Piedmont Triad Region is either good or excellent.

13. Overall ranking of cooperation in the Piedmont Triad between urban and rural areas:

	Response Percent	Response Total
Excellent	1.7%	15
Good	25.9%	223
Average	**44.7%**	**385**
Below Average	21.5%	185
Poor	6.3%	54
	Total Respondents	**862**
	(skipped this question)	**284**

The Region received many average rankings for cooperation between urban and rural areas (44.7 percent).

14. Overall ranking of cooperation in the Piedmont Triad between Greensboro, Winston-Salem, and High Point:

	Response Percent	Response Total
Excellent	2.3%	20
Good	25.9%	223
Average	**43.9%**	**378**
Below Average	20.3%	175
Poor	7.7%	66
	Total Respondents	**862**
	(skipped this question)	**284**

The Region also received many average rankings for cooperation among the three major cities (43.9 percent).

15. In your opinion, what can the Piedmont Triad do to improve cooperation?

There were 858 responses to this question (although a number of responses were "No opinion", or "Don't know"). The following table shows the most frequently mentioned suggestions to improve cooperation.

Response	Number of Responses
Work together rather than compete against each other	110
Think and act regionally	67
Improve communication	43
Involve smaller and rural areas, treat them equally	37
Hold region-wide meetings, discussions	32
Attract more jobs and businesses	30
Establish common vision and goals	28
Continue existing efforts	27
Engage in joint projects with mutual benefits	21
End turf wars	20
Combine/consolidate governments and government services	18
Combine/consolidate chamber and economic development efforts	16
Educate and create awareness of regionalism	16
Need better elected officials	16
Better education and training	15
Establish tax revenue sharing	15
Involve businesses	15
Market/promote the entire region	15
Create task forces, committees, joint commissions	14
Improve mass/public transportation	13
Engage citizens	12
Need new leadership	12
Create regional organization/government	10
Enlist media support and promote regional media coverage	9
Support and provide incentives for small businesses	9
Create joint industrial park or development zone	8
Hold region-wide or cross-community activities and events	8
Improve roads/transportation	8
Create incentives for cooperation	7
Share resources	7
Put egos aside	6
Establish successes early	3
Establish trust	3

The following selected responses are examples of what respondents wrote.

- *Work together rather than compete against each other:*

- Work together 'on' landing business for the region as opposed for one specific city. Stop playing a zero sum game with economic development.
- Continue to seek opportunities to work together through cooperative efforts in economic development. Even as we compete vigorously for industrial/business projects, there are multitudes of opportunities on the ED soft side (tourism, arts, culture, recreation, downtown improvements, etc.)
- Community leaders, both public and private must be willing to work together and 'compromise' on projects and issues when it is in the best overall interest of the region.

- *Think and act regionally:*
  - Break down the 'what's in it for ME' mentality and think about what's best for the region and its people.
  - Promote regional approach to areas of common interest - tourism, infrastructure, education, cultural activities, environment, and health care. Use a sustained effort with the media, public relations campaign, and inter local governmental entities.
  - In every meeting in government, civic, economic entities, and to the extent possible private industry, ask and answer this question; 'is this something we should be addressing/sharing at a Triad level and with our colleagues in the other communities.'
  - Observe how the Winston-Salem, High Point, and Greensboro Chamber Presidents have been striving to encourage Triadism while still promoting their own home town Chambers.
  - Think Triad-wide and develop support across the region. I realize a couple of initiatives already exist but they don't have the weight of the key players so they don't really have enough influence.
- *Improve communication:*
  - The area chambers of commerce must continue their dialogue and encourage political leaders to do the same.
  - Keep dialogue open between those entities that can offer suggestions for change.
- *Involve smaller and rural areas, treat them equally:*
  - Assure that all parties are at the table, including the rural communities like Caswell County. The region is very diverse and it is difficult to design programs that meet the needs of all communities within the region.
  - There is a perception that the larger communities know what is best for their smaller neighbors and impose their will upon them. There needs be a better sense of partnership.
- *Hold region-wide meetings and discussions:*
  - Come together as a REGION! Have workshops, roundtable discussions, informal meetings, etc. to discuss ways to begin to think

    - on a regional level. Invite and strongly encourage leaders from all counties in the region to participate in these meetings.
    - Hold frequent open and transparent meetings of public officials and public professionals from the different sections of the Triad to develop plans for improving the area. Televise meetings. Address real issues.
    - Have business after hours combined with all chambers to get folks talking.
- *Establish common vision and goals:*
    - Have a single, united vision of where we are going in the future.
    - Find some areas where cooperation really can benefit the region and where folks are comfortable collaborating. Stop worrying about the natural competitiveness of communities on subjects such as business recruitment.
    - Make a solid commitment with resolutions to the public and share the vision on how each can grow together and lose the power struggling with small entities.
    - Be willing to work toward win-win partnerships and be willing to be flexible toward new ideas.
- *Continue existing efforts:*
    - Continue with the initiative that the three Chambers have started, and to generate more support for the PTP. Some type of Media coverage illustrating the examples of Triad success and continuing programs will keep more people engaged and will take them out of their 'local' mindset.
    - Keep communicating. Support programs that cause broad, regional understanding like the Triad Leadership Network. Support PART and get more people to use it to move throughout the region.
- *Engage in joint projects with mutual benefits:*
    - Identify specific projects on which we can cooperate, build trust among the players, and move forward from there.
    - Enter into more joint projects where everyone's best interests are at stake.
    - Sponsor regional projects such as multi-jurisdictional parks; regional workforce training centers; sub-regional marketing groups for viticulture, motorsports, bio-tech, crafts; joint incentive offers/revenue sharing from multiple counties to lure companies like Dell; connecting infrastructure systems; etc.
- *End turf wars:*
    - Realize that more and more people live in one city and work in the other and that these folks don't recognize the turf issues.
    - As with the Dell proposals the different counties showed their true colors with the incentive packages presented. It is a "dog eat dog world" and the counties lost all cooperation or any pretense of being a united force.

- *Combine/consolidate government and government services:*
    - Merge COGs.
    - Turn the entire region into one large Metro area and do away with all the various local and county governments. Nashville, TN did this back in the 1960's and their success they are having today is due to this.
    - Increase consolidation of programs/services, particularly in Guilford County, to eliminate redundancy between Greensboro and High Point. Consider merging small programs and creating larger, more powerful Triad organizations—Arts Councils, Chambers of Commerce. Create tax revenue sharing opportunities among multiple jurisdictions to foster collaborations.
- *Combine/consolidate chamber and economic development efforts:*
    - Refer to itself as the Triad; market itself as the Triad, begin to merge some organizations.
    - One economic development effort.
    - Continue to look for ways to consolidate economic development initiatives to improve coordination and reduce marketplace confusion and the cost of duplicate efforts.
- *Educate and create awareness of regionalism:*
    - Educate the leadership of each area on the importance and benefit of working together for the greater good of the entire region.
- *Need better elected officials*:
    - Stop expecting that cooperation in the Piedmont Triad will take place as long as the political environment remains as it is and has been.
    - Elect officials with vision.
    - Elected officials need to follow the lead of chamber staff in trying to work together for the overall good. There is substantial turfism among elected officials.
    - We need better cooperation among the city and county governments as well as better leadership from our elected officials.
- *Establish tax revenue sharing*:
    - Create a shared-incentive, shared-tax revenue system so that we cooperate on business retention and expansion rather than compete.
    - Establish process that cities and counties can jointly propose economic development assistant packages and share the revenues.
    - It seems as if a cost share revenue plan could have been created between Forsyth, Guilford, and Davidson Counties to provide one incentive package to Dell. A generous package could still have been presented, yet each individual unit of government could have committed less. Yes, only one county would benefit directly from the plant's location, but everyone stands to win no matter the outcome.
- *Involve businesses*:
    - Attract more leaders from the private sector to leadership positions in organizations such as the Piedmont Triad Partnership. Current leadership is too heavily weighted with governmental representatives,

who are naturally protective of parochial interests. Private sector leaders simply want to do business, and are less concerned with territorial demarcations.
    - Business leaders initiate more cooperation in an effort to strengthen local political cooperation.
    - Better communication with all businesses in the region. More cooperation from businesses large and small. Currently it is only the opinions of large businesses that matter and of course they have agendas.
- *Market/promote the entire region:*
    - Go public. What is the 'Piedmont Triad'? Articles, press, and media attention. Make it known that there is a larger community.
- *Create task forces, committees, joint commissions:*
    - Create a council of entrepreneurial and economic development organizations to share information, opportunities and coordinate efforts.
    - Put a team of representatives from each city and/or county together to discuss future plans so they do not conflict or compete with each other as the region grows.
- *Engage citizens:*
    - Bottom up planning efforts rather than top down.
    - Involve more citizens not tied to the business or governmental sectors in discussions related to visions for the Triad's future.
- *Need new leadership:*
    - All the old schools need to die off and guide the younger leaders to work together.
    - Nothing short of a paradigm shift towards regional thinking down to the level of average citizens will improve this cooperation. From my perspective as a graduate student and prospective member of the creative class, I see the large pool of colleges and universities as one potential medium for improving regionalism. These institutions combined have many thousands of people who most likely would collaborate well, due to the likelihood of this demographic appreciating and respecting others' differences. More emphasis should be placed in bridging the gap and combining resources in these mostly isolated institutions.
    - Remove community leaders who stonewall growth efforts.
- *Create regional organization/government:*
    - A regionally based organization with local representation from all areas to promote general welfare.
    - Create an umbrella organization, a regional entity with political support and business support, which can overlay planning and economic groups for action on key regional concerns. In short, each community has too many bits of turf which must be protected by

  - those in power which leaves us with no 'glue' to stick us together for the common good.
  - Continue to form leadership organizations across the region.
- *Enlist media support and promote regional media coverage:*
  - Enlist media support to unify region (i.e., the two main newspapers each virtually ignore news from the other county/half of the region, forcing some of us who care about what's going on to have to subscribe to both the WSJ and N&R.)
  - It would be helpful if there was a print publication, besides the Business Journal, that seriously covered both counties.
- *Establish successes early:*
  - Choose some easy successes for cooperation, to generate good will and understand the dynamic between the players. Then try something harder, like transportation.
- *Establish trust:*
  - Stop being jealous of one another! Trust! Trust! Trust!
- *Other comments:*
  - Recognize the variance in special strengths and capitalize on these to broaden the cooperative ventures rather than duplicate.
  - I have lived in this county/region 4.5 years. This is at least the 4th survey of this kind I have participated in. **When will the surveys stop and the ACTION begin??** ***Whatever happened to the major undertaking of the regional survey and consultation from the Angelou Economics team??***

16. In your opinion, what is the Piedmont Triad Region's one greatest strength?

There were 559 responses to this question (although a number of responses were "None", or "N/A"). The following table shows the most frequently mentioned attributes of the Region. The location of the Region was by far the most frequently mentioned strength, followed by people, quality of life, and the transportation and highway network. Also, education and the workforce were mentioned quite often in multiple aspects; those aspects are listed separately.

Response	Number of Responses
Location	177
People	100
Quality of life	90
Transportation and highways	63
Higher education institutions	39
Climate	38
Cost of living	28
Accessibility and proximity	25
Diversity	24
Educational opportunities	22
Opportunity/potential	22
Natural resources/beauty	21
Education	17
Health care	16
Regionalism/unity/willingness to work together	15
Quality of workforce	14
Available workforce	13
Willingness/commitment to action/improvement	12
Workforce	12
Good place to raise a family/family oriented	11
Small town qualities (with big city benefits)	11
Work ethic	11

The following selected responses are examples of what respondents wrote.

- *Location:*
  - In the middle of everything.
  - Center of the state: mountains, beaches, Charlotte, Virginia.
- *People:* The neighborliness of the residents. Piedmont people help each other.
- *Higher education:*
  - Our universities - lifeblood of young, energetic and creative people.
  - Strength on local college and job training opportunities at local community colleges.
- *Diversity:*
  - A population with diverse backgrounds.
  - Diversity of people and their talents.
  - Diversity in cultural and activities, school, etc.
  - The many universities in the area bring good diversity to the area!
  - Job diversity.
  - Tolerance of diversity.
- *Opportunities/potential:* Potential if used to benefit all.
- *Natural resources/beauty:* The natural beauty of the area and the way we preserve green space to be attractive to those wishing to relocate and to those of us who have grown up with it and expect it as a part of who we are.

- *Regionalism/unity:*
    - Attempts to work together to strengthen our one Regional identity.
    - Beginning to cooperate.
    - Potential by building partnerships and sharing resources to grow together.
    - Triad Unity - not uniformity.
    - Recent partnership efforts.
- *Workforce:* Available workforce if proper training can be provided to unemployed or underemployed.
- *Willingness to improve:*
    - Willingness to find solutions to problems.
    - Willingness to address the issues.
    - Commitment to work together.
    - A desire of the majority to improve the economic potential of the Triad.
    - The desire to move with the times and grow.
- *Small town with big city benefits:*
    - Small enough to be close to work, big enough for quality of life.
    - Small town living with a little taste of big city life.
    - It has most of the qualities of a larger city without many of the hassles associated with one.
- *FedEx/Dell:* FedEx and Dell as catalysts for development.
- *Leadership:* Highly motivated leaders determined to improve life in the Triad.
- *Culture/arts:* The culture of arts, design and craftsmanship.
- *Urban and rural:* A mix of rural and urban lifestyles.
- *Communities:* The abundance of wonderful communities to live and work in.
- *Resources:* There is a range of people, communities, and resources that can be combined for regional projects.

17. What do you think is the greatest challenge for the future of the Piedmont Triad Region?

	Response Percent	Response Total
Opportunities for employment consistent with your skill-level, adequately close to your home, and/or provide sufficient wages to meet daily needs.	**41.7%**	**359**
Education and skill-level of the workforce, as well as education and training opportunities	21.7%	187
Road, transit, rail, and air transportation condition and availability	8.7%	75
Telecommunications, water, sewer, and energy capacity	2.8%	24
Cost of doing business	4.4%	38
Incentives for small business development	5.8%	50
Quality of life concerns (health, child care, safety, housing, entertainment, etc.)	8.2%	71
Other (please specify)	6.6%	57
	Total Respondents	**861**
	(skipped this question)	**285**

Quality job opportunities are perceived as the Region's greatest challenge, although education and workforce skills were also a major concern. Fifty-six respondents chose to write in an answer rather than select one of the given choices. The following table shows the most frequently mentioned written responses.

Other Responses	Number of Responses
Environmental issues	9
Lack of regional cooperation	9
All of the above	6
Education system (K-12)	5
Planning for growth	4
New thinking and taking risks	4
Attracting businesses	2
Attracting and retaining young people	2
Balance of economic growth and quality of life	2
Developing a vision	2
Moving from manufacturing economy	2

Some of the comments that respondents wrote include:

- Acting regionally rather than individually on business development.

- Elementary and secondary schools that will prepare children to take their place in a highly competitive world.
- A plan for growth in all areas.
- Stop living in the past, we need new, fresh, bold vision, prepared to take risks.
- Developing a vision for a future that provides enough space for the diversity and creativity within its bounds.
- To foster the economic growth that we need for jobs without sacrificing the green space and rural areas that contribute so highly (and go unappreciate) to our quality of life.

Conclusion

CONCLUSION

Through the course of this input process for the Region, *Market Street* heard from a variety of stakeholders via interviews, focus groups, and an online survey. Comments shared during this process are valuable for informing subsequent deliverables and for getting a sense of the key issues from Regional stakeholders.

Input collected through the multiple methods of stakeholder participation identified several common themes. The Piedmont Triad Region's location, quality of life, and transportation network are its greatest assets that need to be supported and leveraged. Stakeholders also identified multiple challenges that the Region needs to address:

1. The Region's universities are assets, but research capacity needs to be developed further. The *Competitive Realities* report found that aside from Wake Forest University, the other universities in the Region do not make a substantial impact in terms of their R&D funding. Also, the quality of the K-12 education system is a concern to many stakeholders. Data from the *Competitive Realities* report support this concern.

2. The Region needs to take steps to attract and retain younger workers and the creative class, by creating job opportunities and developing assets that improve their quality of life. The Region lost population in its 18-to-24 age group between 1990 and 2000, and saw only anemic growth in its 25-to-34 age group.

3. Regional entities must work together on planning for land-use, transit, and water and sewer capacity. Stakeholders are increasingly concerned that lack of planning will affect quality of life and the environment. Data from the *Competitive Realities* report showed that pollution was impacting the Region's environment.

4. The Region needs to support existing businesses, small businesses, and entrepreneurs with increased resources and coordinated efforts. While bank loans are widely available, venture capital funding for high growth firms is scarcer.

5. Regional leadership needs to be more open and inclusive, of all parts of the Region as well as of minorities.

6. The Region needs to work together to leverage its potential. Many stakeholders are very concerned about the Region's economy and its ability to create quality jobs. Promotion of the Region needs to be done internally as well as to those outside of the Region.

The challenges identified here are issues to be considered as the strategic planning process progresses. Many of the issues are supported by the findings of the *Competitive Realities* report. These are issues that cannot be addressed at a county-by-county level; new Regional organizational structures and increased capacity may be needed. Critical questions going forward include deciding what challenges are the highest priority, what the Region needs to do to address these challenges, and what organizational capacity it has to take the necessary actions.

The strategic planning process moves next to the *Target Cluster Analysis* which will identify primary business sectors that have the highest probability of sustained success for the future of the Region's economy. The *Target Cluster Analysis* will examine national trends and build upon the work of the *Competitive Realities* and *Regional Input Summary*.