



# Moore County Employer Behavior Survey Summary

August 2022



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## I. ClearPath Research

Ms. Natalie Hawkins and Ms. Linda Parsons are the key contacts for Moore County. Moore County's NBRI team consists of Mr. Cory Thompson, Research Manager and primary point of contact, Ms. Lisa Michelangeli, Organizational Psychologist, and Dr. Jan West, Executive Sponsor.

### A. Methodology

The survey contains sixteen (16) scaled and benchmarked questions, and fifteen (15) scaled and non-benchmarked questions. In addition, there are several other question types, including Multiple Choice, Multiple Select, and Yes/No. The benchmarked items comprising Moore County's research instrument have been used by thousands of companies and millions of people.

The survey deployed via postcard, email, and phone from May 31<sup>st</sup> to July 29<sup>th</sup>, 2022. A total of 149 completed surveys were received from a population of 3,418 employers, representing a response rate of 4% overall. Statistically, the results of the present study reach an 80% confidence level with a 5% sampling error. Moore County may be confident that the survey data represents the psychology of employers in its target market.

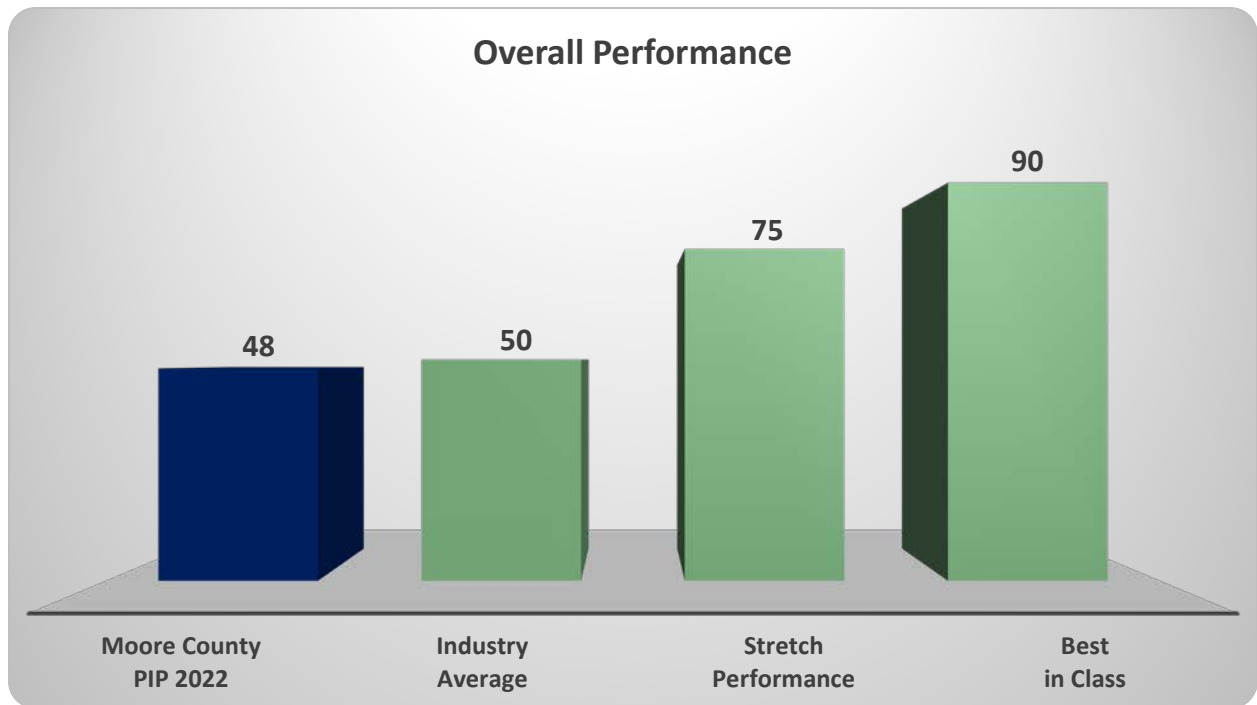
Based on the benchmarked items, Moore County is performing at the **48<sup>th</sup>** percentile of its industry, defined as NAICS Code 926110 - Administration of General Economic Programs. Moore County benchmarking database includes over 25,000 individual opinions per item with the Industry Average at the 50<sup>th</sup> percentile, Stretch Performance at the 75<sup>th</sup> percentile, and Best in Class Performance at the 90<sup>th</sup> percentile.

Statistical significance refers to the difference between any two scores, and whether the difference is 'true' versus just by 'chance.' A 'statistically significant difference' is a difference of five (5) or more percentiles. Differences that meet this criterion are referred to as 'higher' or 'lower,' while differences that are not statistically significant are referred to as having no difference at all. For example, a score of 75 is 'higher' than a score of 68 but is 'not different' from a score of 72, due to the 5+ percentile rule.

## B. Company Analysis

Moore County's overall score is at the 48<sup>th</sup> percentile of its Industry in 2022, based on the performance of the sixteen (16) benchmarked items. Moore County's overall score places the County two (2) percentiles below Industry Average (50<sup>th</sup>).

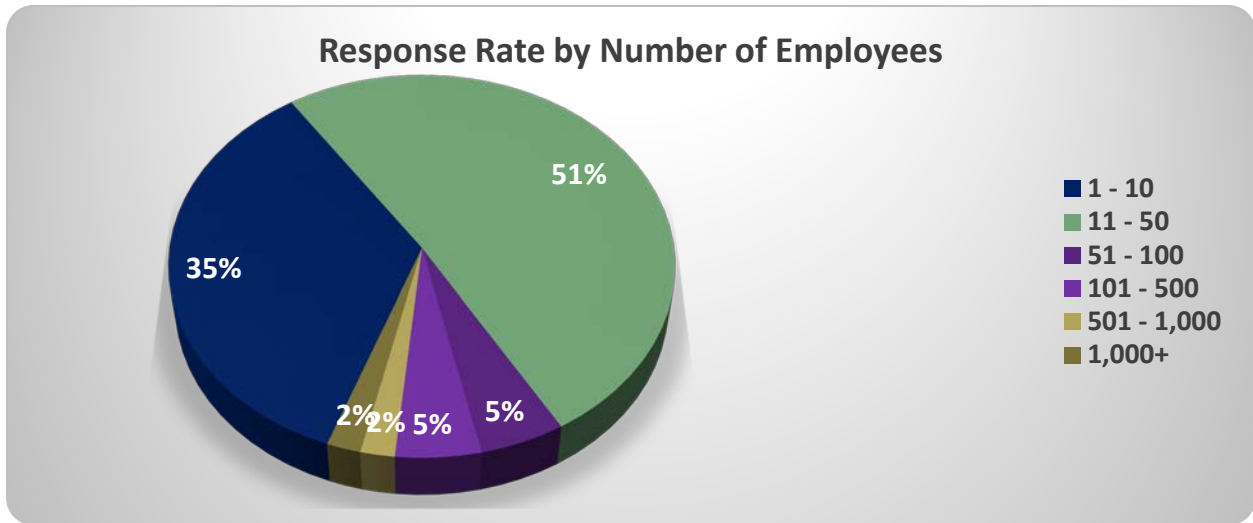
The figure below graphically displays Overall Score for 2022, and compares it with Industry Average, Stretch Performance and Best in Class Performance benchmarks.



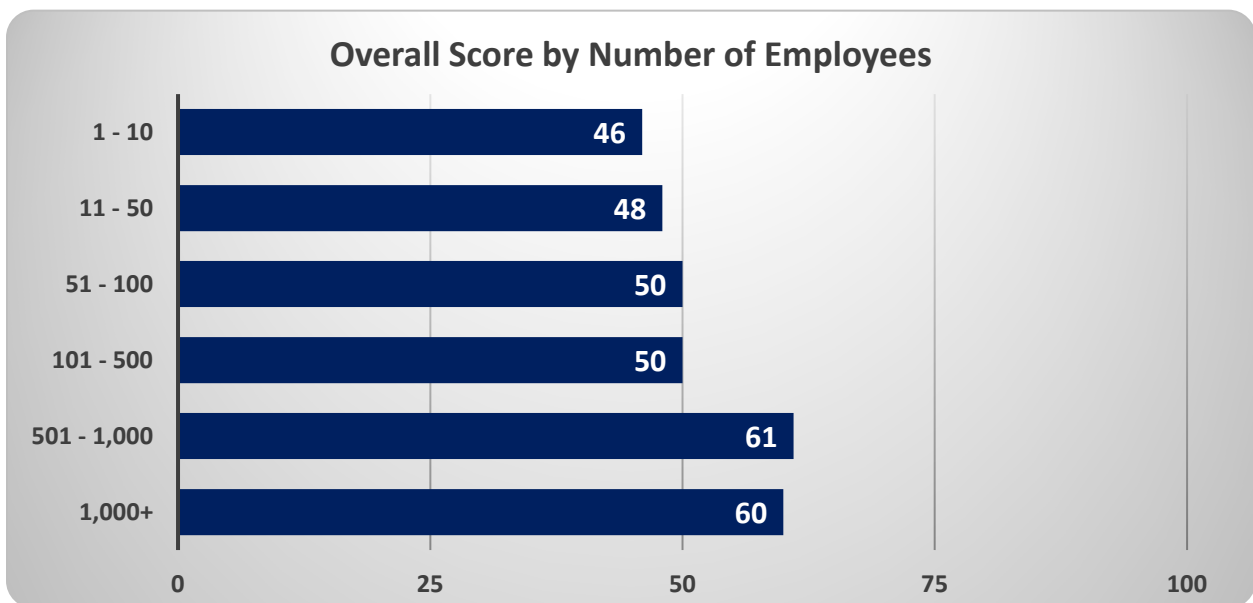
### C. Demographic Results

#### Number of Employees.

Fifty-one percent (51%) of respondents have 11 - 50 employees, thirty-five percent (35%) have 1 - 10 employees, five percent (5%) each have 51 - 100 employees and 101 - 500 employees, and two percent (2%) each have 501 - 1000 employees and 1000+ employees.



Overall Score is within, at, or above Average (50<sup>th</sup>) for all respondent groups by Number of Employees. Each overall score is an average of each responding group.

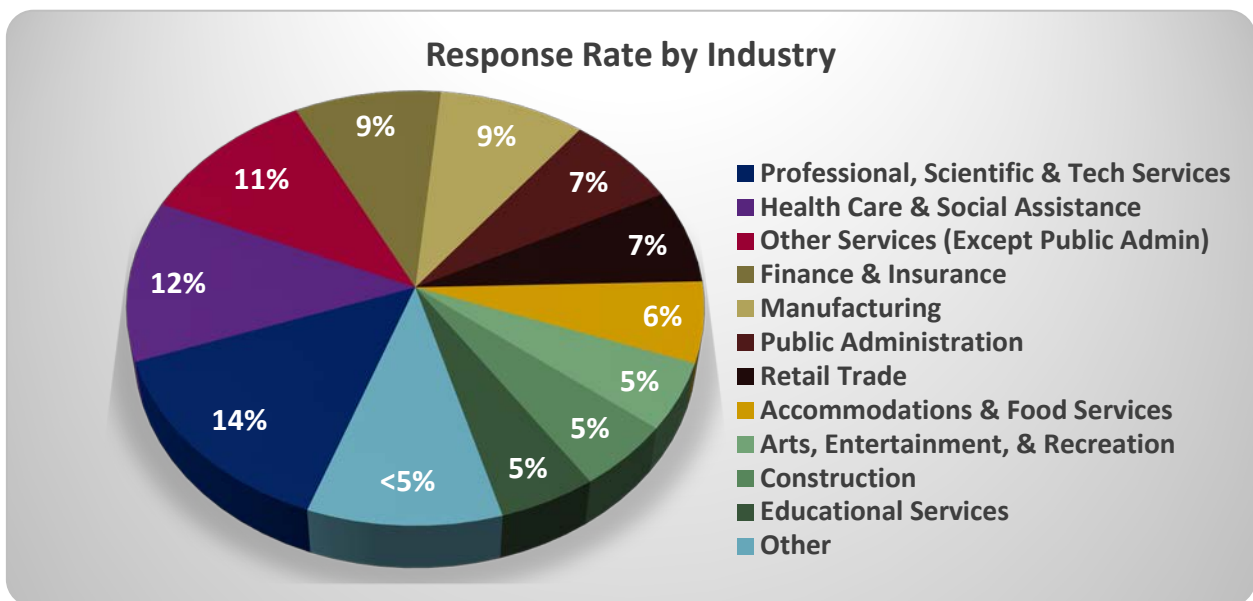


*Industry (NAICS).*

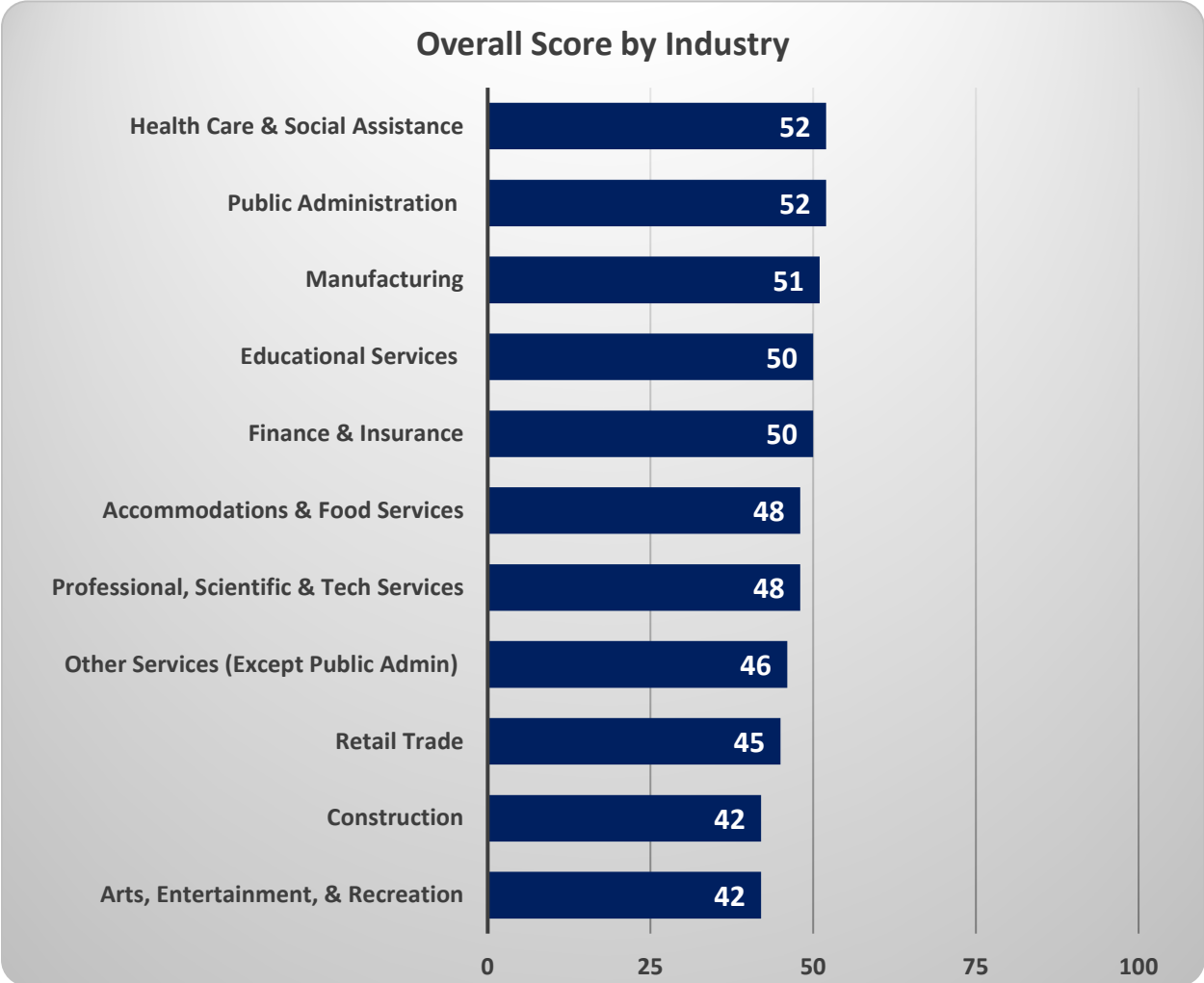
Fourteen percent (14%) of respondents are in the Professional, Scientific & Tech Services industry, twelve percent (12%) are in Health Care & Social Assistance, eleven percent (11%) are in Other Services (Except Public Admin), and nine percent (9%) each are in Finance & Insurance, and Manufacturing.

Seven percent (7%) of respondents are in the Public Administration and Retail Trade industries, six percent (6%) are in Accommodations & Food Services, and five percent (5%) each are in Arts, Entertainment, & Recreation, Construction, and Educational Services.

The remaining ten percent (10%) of respondents, represent those industries with less than five percent (<5%) representation.



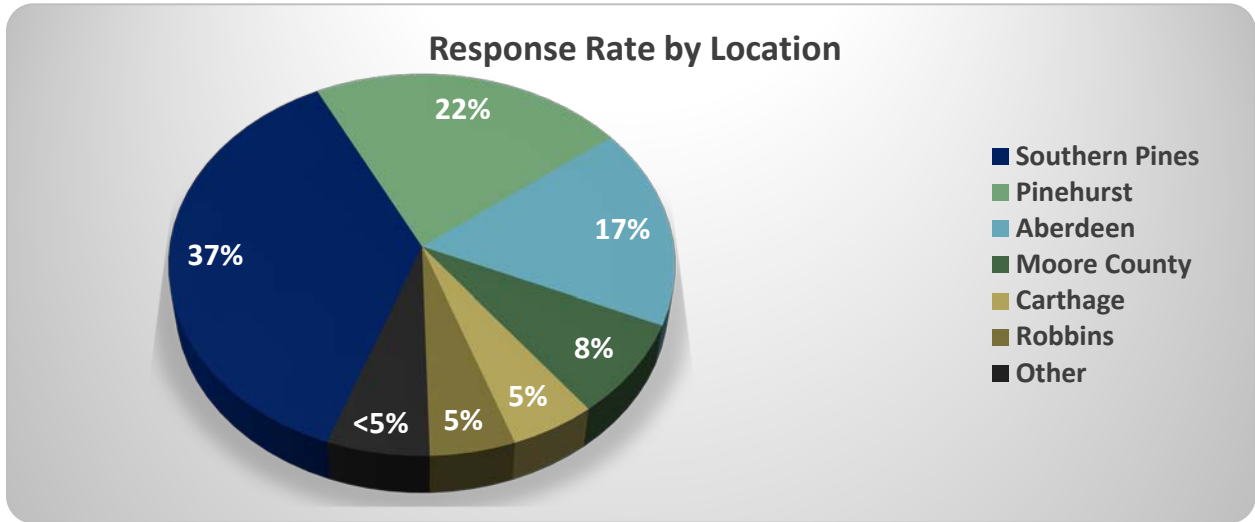
Overall Score is above, at or within Average (50<sup>th</sup>) for all respondent groups by Industry, except for Retail Trade, Construction, and Arts, Entertainment, & Recreation, which are performing below Average (50<sup>th</sup>).



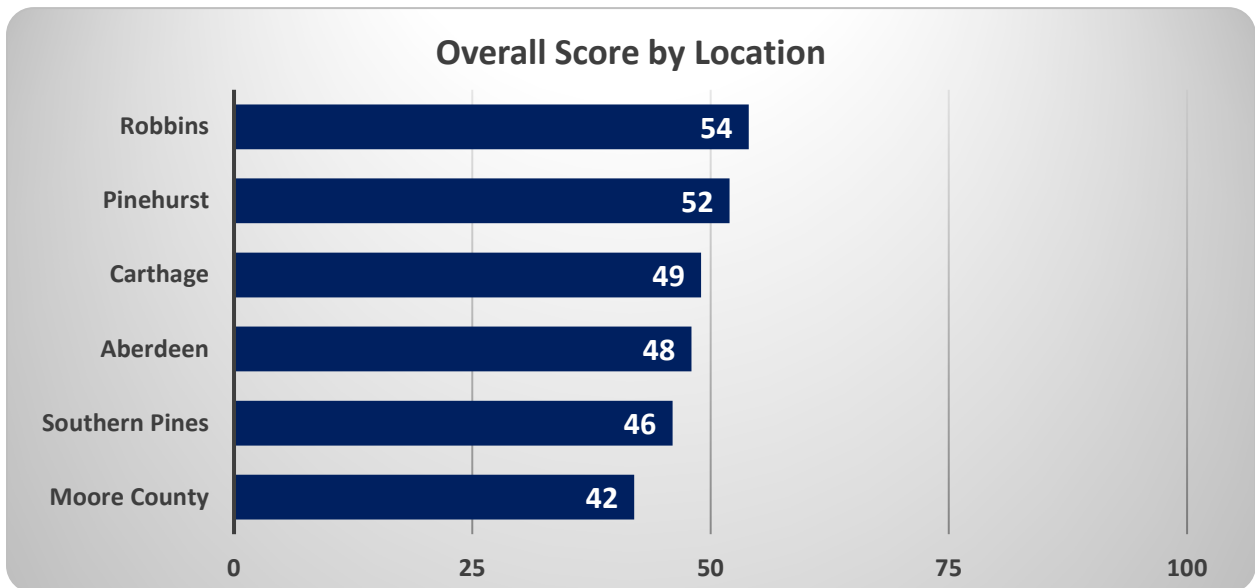
*Location.*

Thirty-seven percent (37%) of respondents are in Southern Pines, twenty-two percent (22%) are in Pinehurst, seventeen percent (17%) are in Aberdeen, eight percent (8%) are in Moore County, and five percent (5%) each are in Carthage and Robbins.

The remaining six percent (6%) of respondents represent locations that each have less than five percent (<5%) participation.



Overall Score is within or above Average (50<sup>th</sup>) for all respondents by Location, with the exception of Moore County, which is below Average (50<sup>th</sup>).

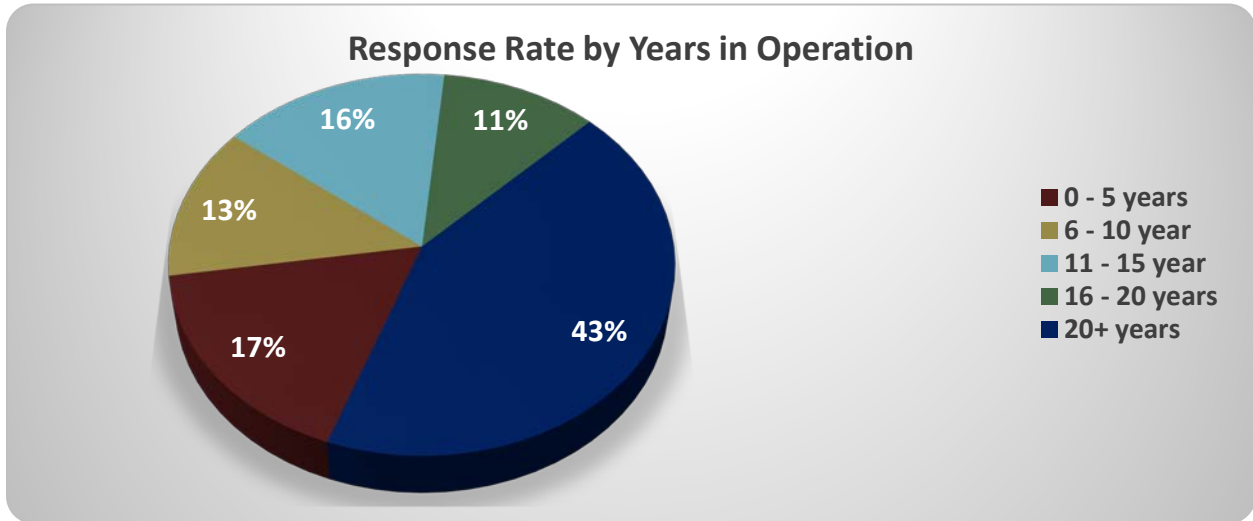


*Locations with <5% of respondents are not represented in chart.*

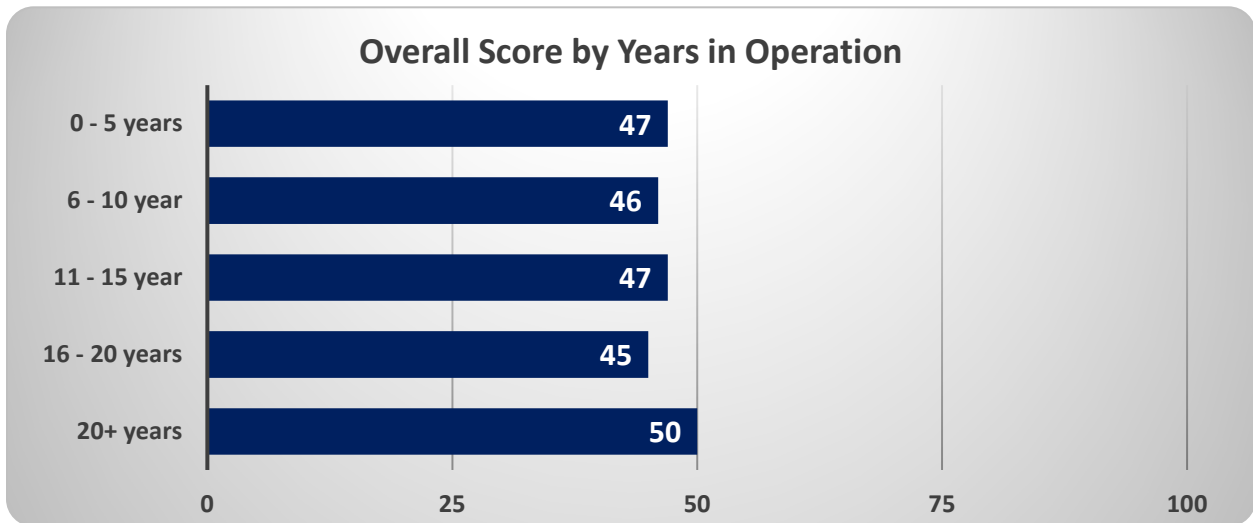


*Years in Operation.*

Forty-three percent (43%) of respondents have been operating for 20+ years, seventeen percent (17%) for 0 - 5 years, sixteen percent (16%) for 11 - 15 years, thirteen percent (13%) for 6 - 10 years, and eleven percent (11%) for 16 - 20 years.



Overall Score is at or within Average (50<sup>th</sup>) for all respondent groups by Years in Operation, except for the 16 - 20 years group, which is performing below Average.

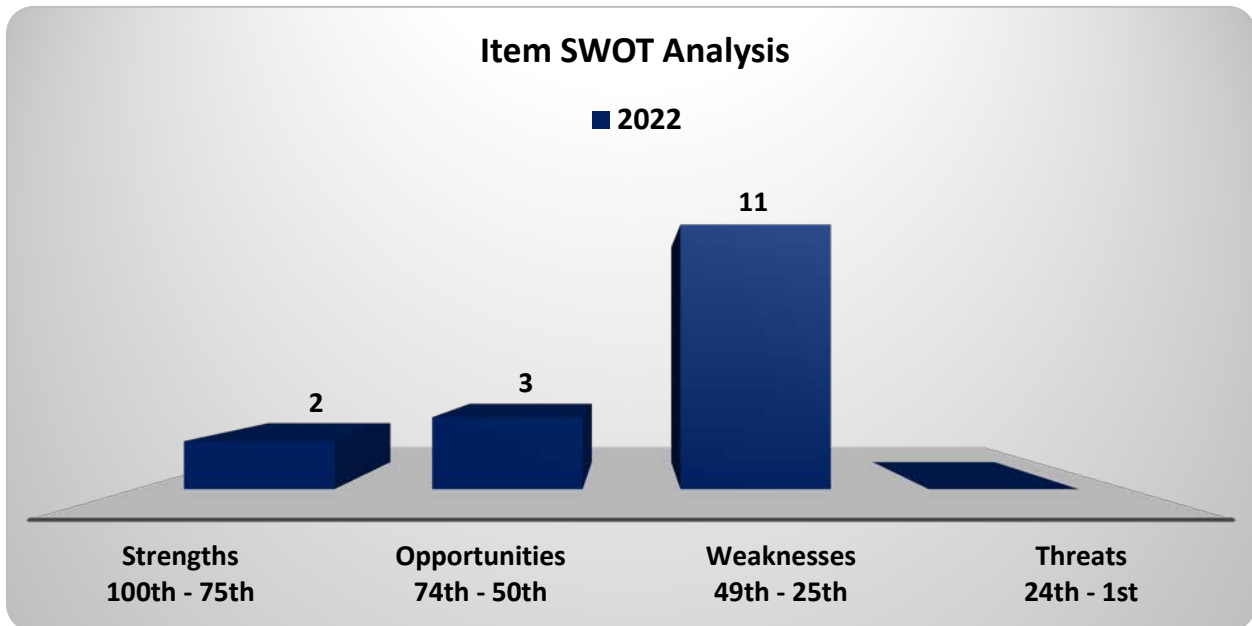


#### D. Item Analysis

Performance at a Benchmarked Item Level is evaluated by SWOT analyses, where results are divided by quartile to understand Strengths, Opportunities, Weaknesses, and Threats. Strengths range in score from the 75<sup>th</sup> to the 100<sup>th</sup> percentile and represent an Organization's core competencies. Opportunities are from the 50<sup>th</sup> to the 74<sup>th</sup> percentile and represent scores that are at/above average. Weaknesses are from the 25<sup>th</sup> to the 49<sup>th</sup> percentile and represent scores that are at/below average. Threats form the lowest quartile, from the 1<sup>st</sup> to the 24<sup>th</sup>, and represent hazards and risks. The categories comprising a SWOT analysis are shown below.

Category	Benchmark Range
Strengths	75 <sup>th</sup> to 100 <sup>th</sup>
Opportunities	50 <sup>th</sup> to 74 <sup>th</sup>
Weaknesses	25 <sup>th</sup> to 49 <sup>th</sup>
Threats	1 <sup>st</sup> to 24 <sup>th</sup>

The figure below shows the distribution of Moore County's sixteen (16) Benchmarked Items for 2022, which reveals two (2) Strengths, three (3) Opportunities, and eleven (11) Weaknesses. A more extensive discussion of the Item SWOT analysis follows.



**Strengths.** Moore County has two (2) items, or 13% of all items, in the Strength Category, scoring between the 75<sup>th</sup> and 100<sup>th</sup> percentiles of the industry. They are:

- I am satisfied with the overall image of Moore County. (79<sup>th</sup>)
- I am satisfied with the overall quality of life in Moore County. (78<sup>th</sup>)

**Opportunities.** Moore County has three (3) items, or 19% of all items, in the Opportunity Category, scoring between the 50<sup>th</sup> and 74<sup>th</sup> percentiles of the industry. They are:

- I am satisfied with Moore County as a place to operate a business. (69<sup>th</sup>)
- I am satisfied with the cost of doing business in Moore County. (53<sup>rd</sup>)
- I am optimistic about the future of our business in Moore County over the next 12 months. (52<sup>nd</sup>)

**Weaknesses.** Moore County has eleven (11) items, or 68% of all items, in the Weakness Category, scoring between the 25<sup>th</sup> and 49<sup>th</sup> percentiles of the industry. They are:

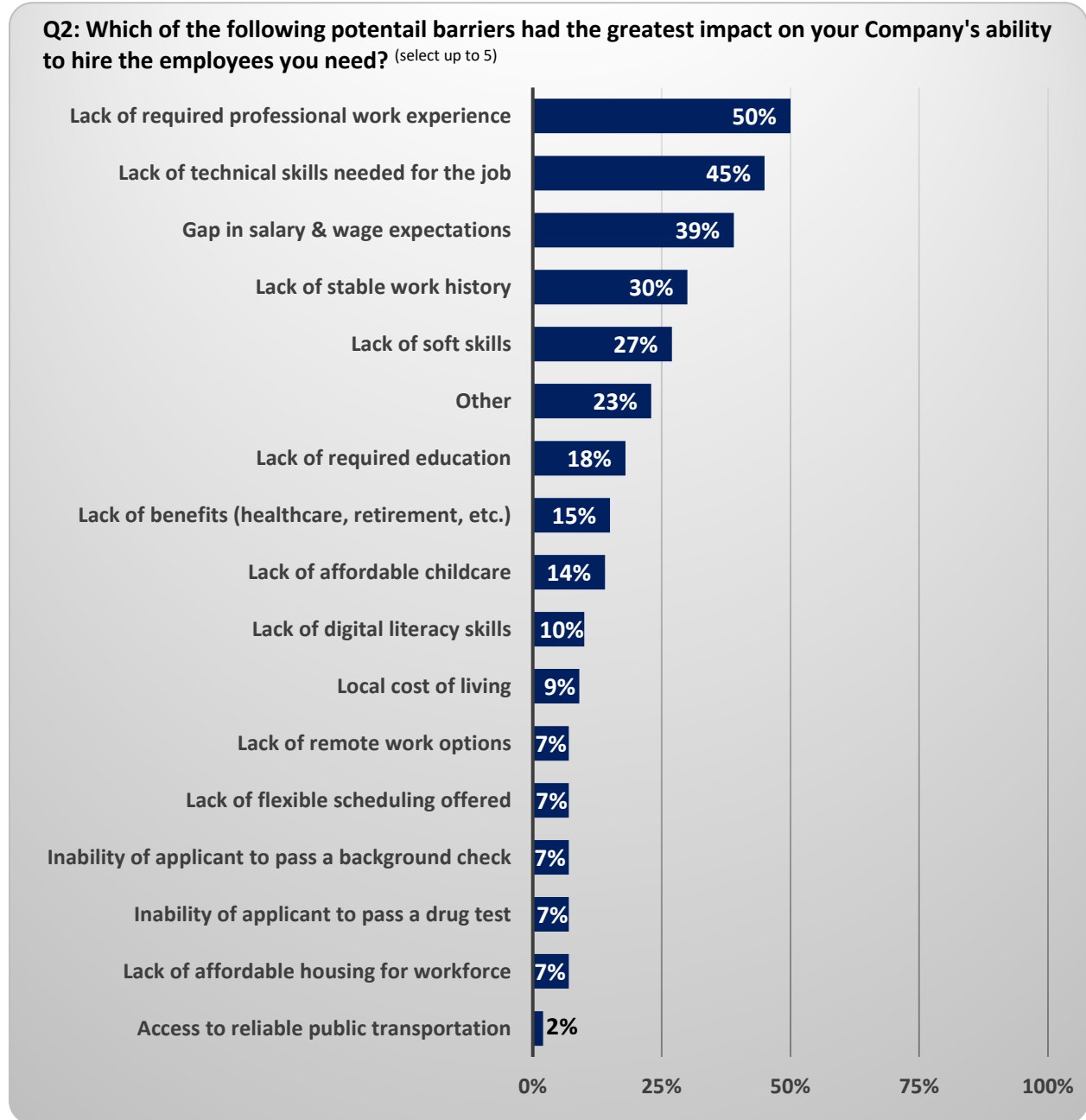
- I would recommend Moore County as a business location. (45<sup>th</sup>)
- I am satisfied with the diversity, equity, & inclusion practices of Moore County employers. (45<sup>th</sup>)
- I am satisfied with the economic diversity in Moore County. (44<sup>th</sup>)
- I am aware of the workforce training programs offered by Sandhills Community College. (44<sup>th</sup>)
- I am satisfied with business regulations in Moore County. (43<sup>rd</sup>)
- Sandhills Community College is effective at generating a sufficient pipeline of skilled, well trained workers for our company. (41<sup>st</sup>)
- I am satisfied with the availability of trained/skilled employees. (39<sup>th</sup>)
- I am satisfied with the availability of high-speed broadband. (38<sup>th</sup>)
- I am aware of the workforce training programs offered by K-12 schools in Moore County. (35<sup>th</sup>)
- K-12 Schools in Moore County are effective at generating a sufficient pipeline of skilled, well trained workers for our company. (35<sup>th</sup>)
- It has been easy to find qualified applicants to fill open positions at our company in the last 12 months. (25<sup>th</sup>)

**Threats.** Moore County has no items scoring between the 1<sup>st</sup> and 24<sup>th</sup> percentiles of the industry, so there are no threats to Moore County at this time.

**E. Additional Item Review**

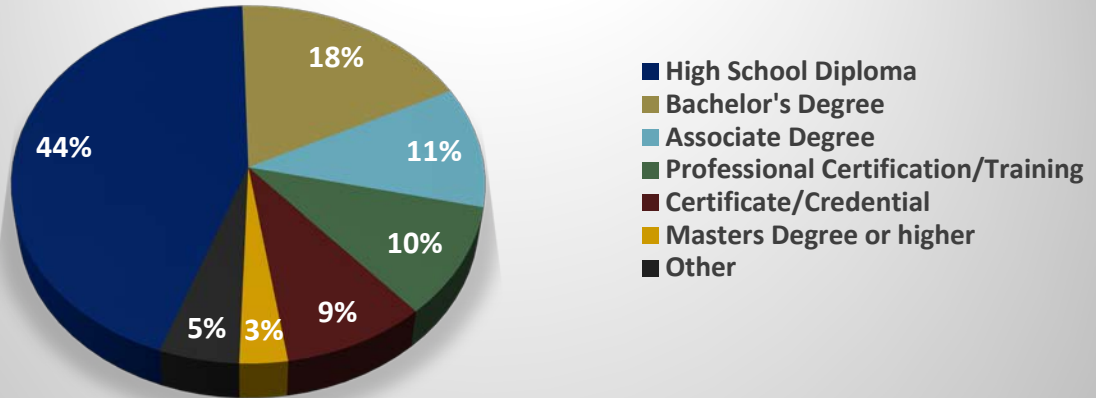
***Recruitment, Retention, and Hiring.***

A lack of required professional work experience, and a lack of technical skills, are the most commonly cited barriers that are impacting the hiring of employees.



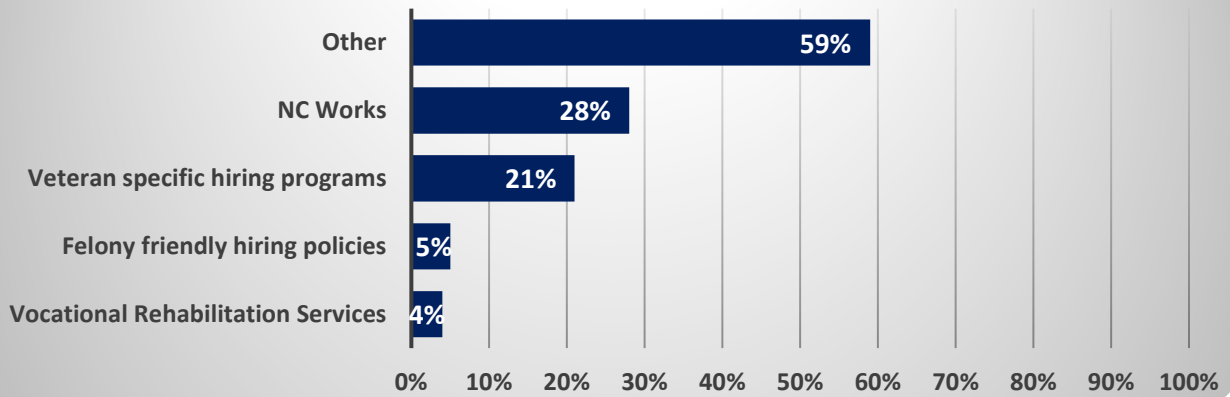
A High School Diploma (44%) is the most commonly required education level for open positions.

**Q4: In the last 12 months, what was the education level required for most of your open positions?**



Most Employers (59%) responded 'Other' when asked which programs or policies they use to increase the diversity of their applicant pool. Where respondents provided more details, many stated that they either do not use any programs or policies, or that the question was not applicable.

**Q5: Please indicate which of the following programs or policies you currently use to increase the diversity of your applicant pool.** (Select all that apply)



**Q12: In the last 12 months, has your company participated in any workforce development activities organized by K-12 Schools in Moore County?**

- 89% No
- 11% Yes

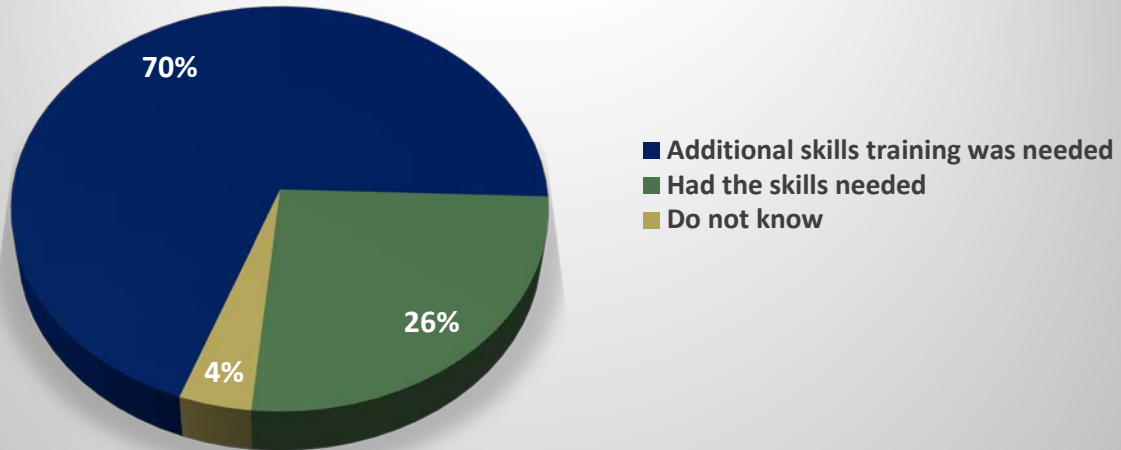
**Q13: In the last 12 months, has your company participated in any workforce development activities organized by Sandhills Community College?**

- 74% No
- 26% Yes

**Education, Skills, and Training.**

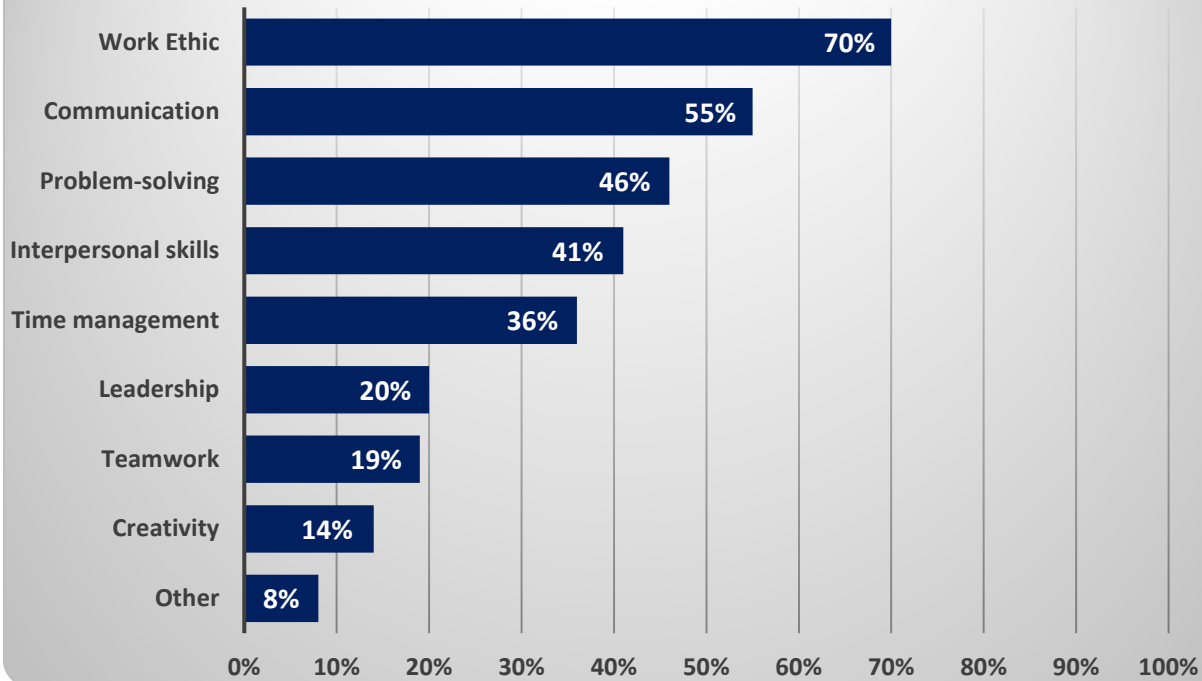
The majority (70%) of new hires needed additional skills training.

**Q7: In the last 12 months, did most of your new hires have the skills they needed, or did they need additional skills training?**

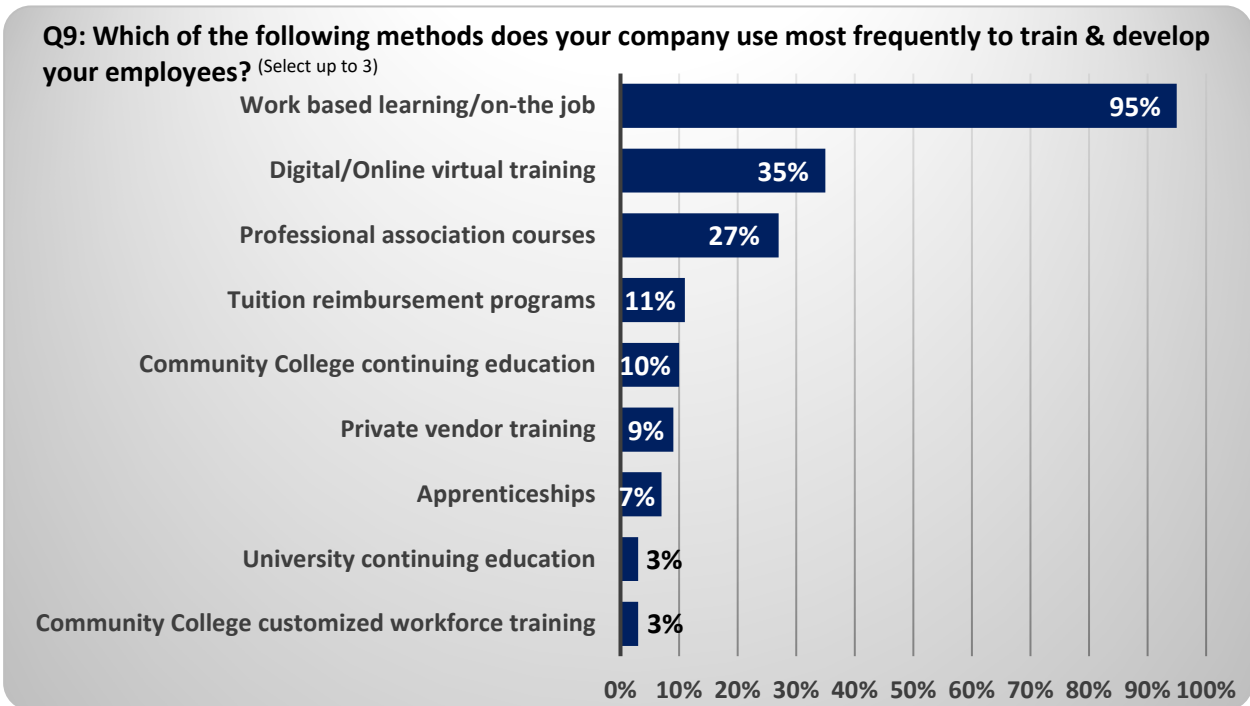


Work Ethic and Communication are the qualities or soft skills that employers found to be most lacking in the applicants they have hired in the last 12 months.

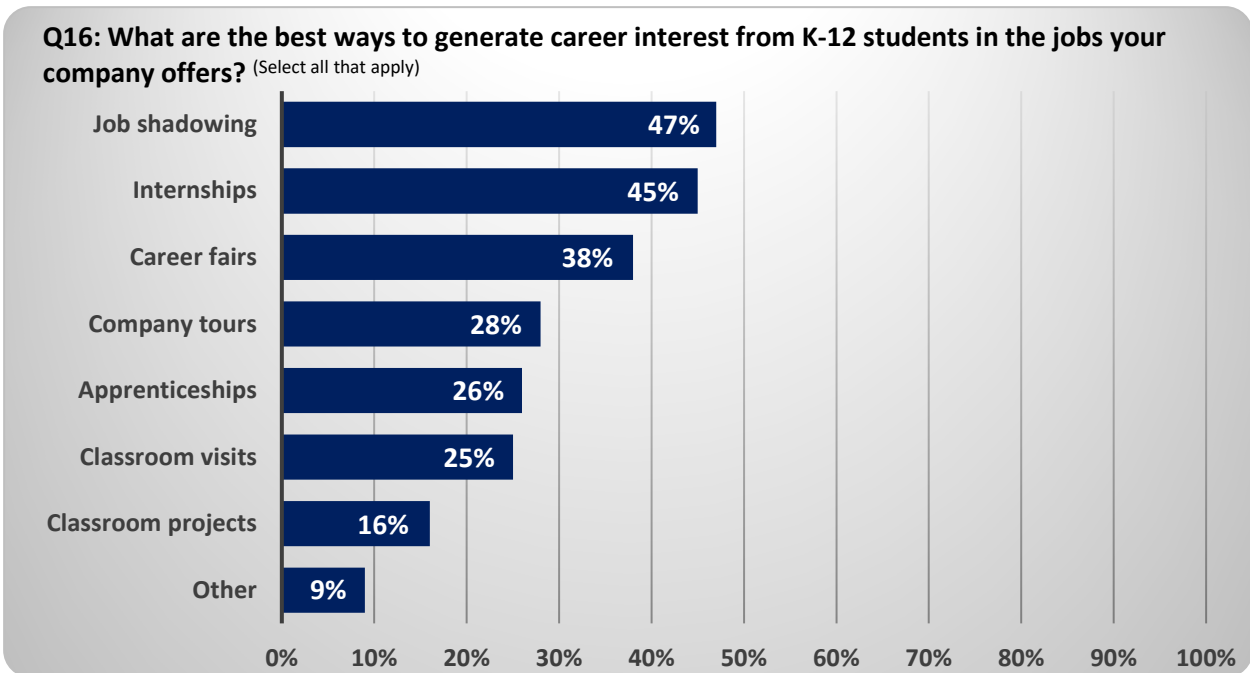
**Q8: What qualities or soft skills do you find lacking most in the applicants you have hired in the last 12 months?** (Select all that apply)



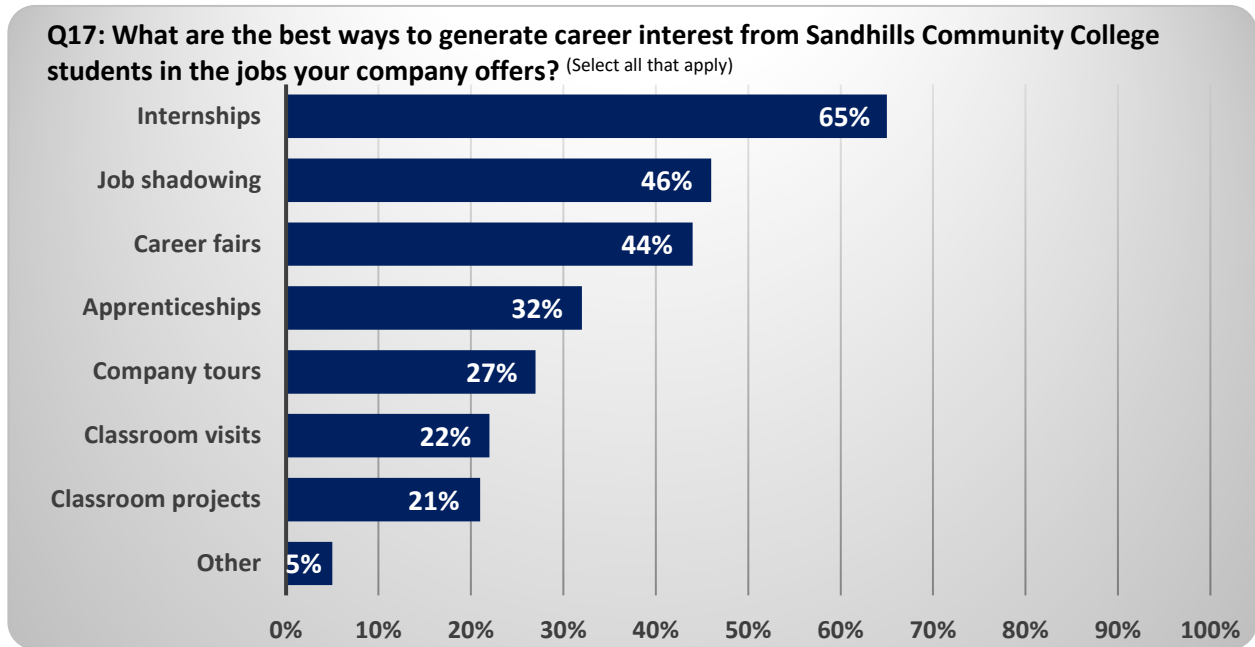
Nearly all (95%) training and development is work based, or on-the-job learning.



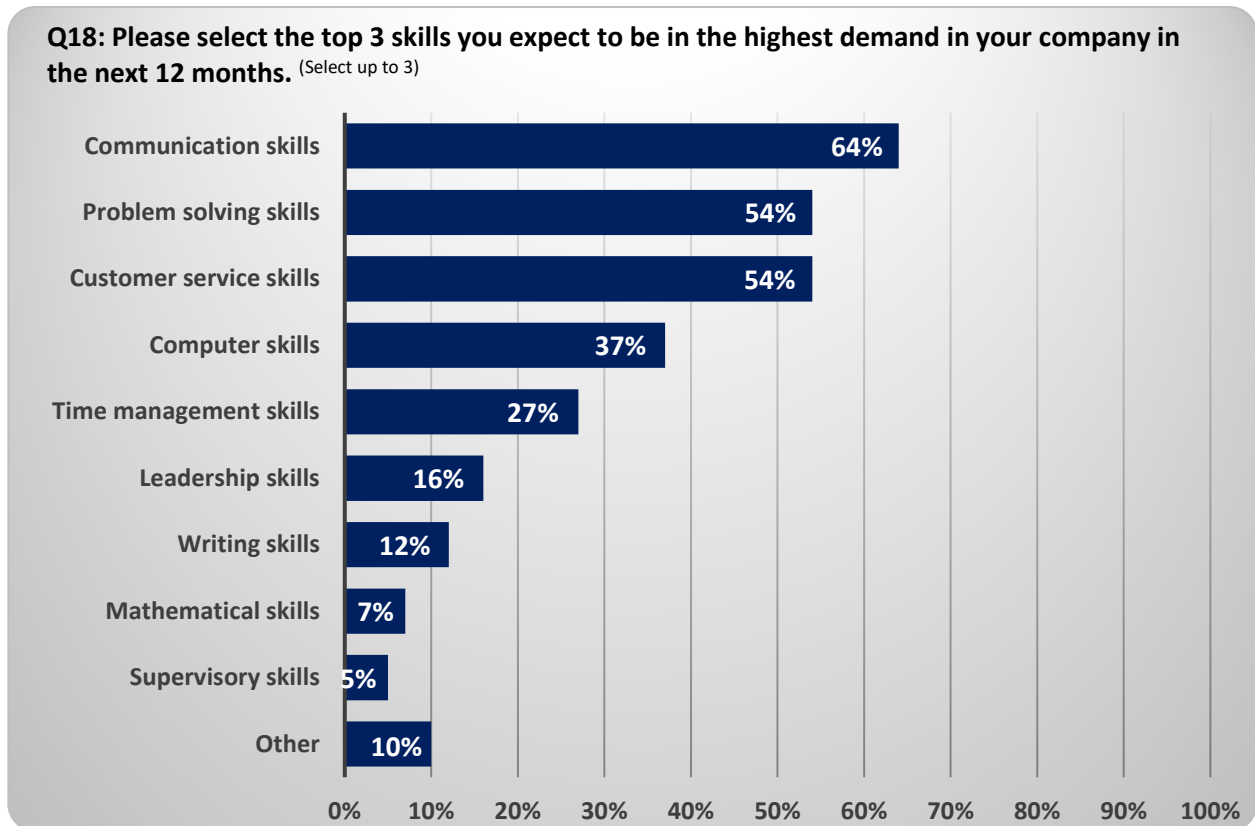
Employers view Job Shadowing (47%) and Internships (45%) as the best ways to generate career interest from K-12 students in the jobs their companies offer.



For Sandhills Community College, a larger group (65%) view internships as one of the best ways to generate career interest.



The skills that employers anticipate being in highest demand in the next 12 months are Communication skills (64%), Problem solving skills (54%) and Customer Service Skills (54%).



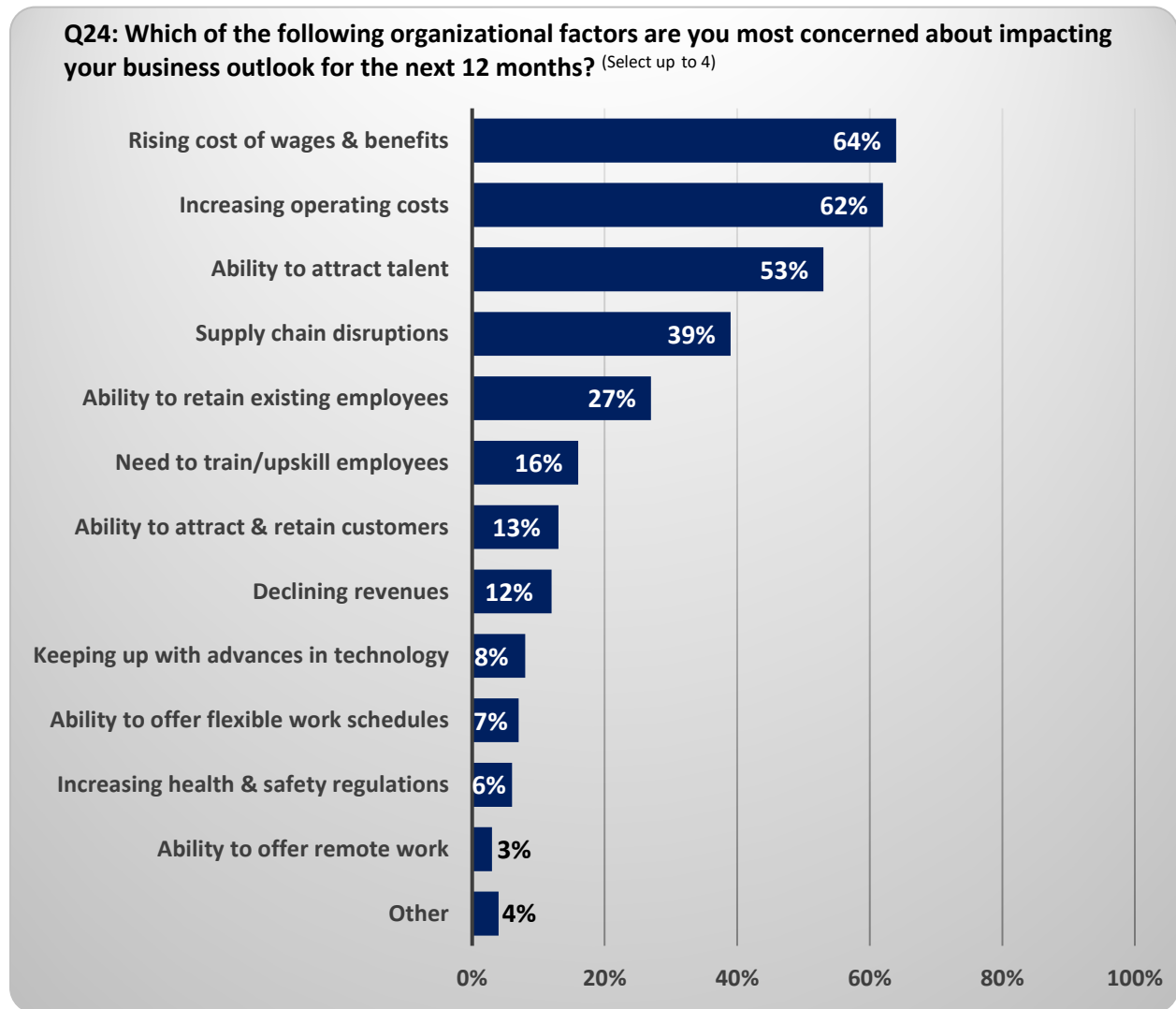


**Business Outlook.**

The majority of employers are optimistic about the future, with sixty-nine percent (69%) expecting a growth in sales/revenue, and sixty percent (60%) expecting an expansion of the workforce.



The rising cost of wages and benefits (64%), and increasing operating costs (62%) are the factors employers are most concerned about for the next 12 months.



### **Satisfaction with the Business Environment.**

The survey includes fifteen (15) additional scaled items which Moore County chose not to have benchmarked. The Means and Distribution of Responses for each of these items are shown below. NBRI is able to benchmark these questions for Moore County, if desired in the future.

Based on the mean scores, employers express greatest satisfaction with the responsiveness (5.19) and level of service and support (5.14) from Moore County Economic Development staff.

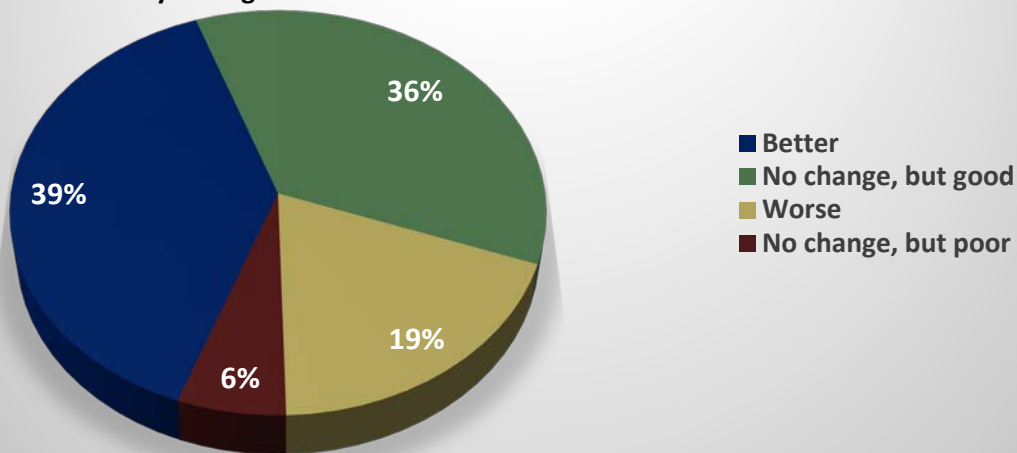
The availability of land and commercial building for expansion (3.71), and the availability of reliable cell phone service (3.84) are the areas where employers express their lowest levels of satisfaction.

Items	Mean	Strongly Disagree	Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately Agree	Strongly Agree
<b>Q51: Moore County Economic Development staff are responsive.</b>							
	5.19	0%	1%	1%	21%	30%	47%
<b>Q52: Moore County Economic Development staff provide a high level of service &amp; support.</b>							
	5.14	0%	1%	2%	22%	30%	45%
<b>Q49: Moore County Chamber of Commerce staff are responsive.</b>							
	5.10	1%	1%	3%	20%	32%	43%
<b>Q50: Moore County Chamber of Commerce staff provide a high level of service &amp; support.</b>							
	5.02	1%	1%	5%	23%	27%	42%
<b>Q33: I am satisfied with the vibrancy of downtown business districts.</b>							
	4.76	2%	2%	5%	24%	41%	25%
<b>Q40: I am satisfied with the availability of public water.</b>							
	4.66	4%	2%	7%	25%	34%	28%
<b>Q41: I am satisfied with the availability of public wastewater.</b>							
	4.51	5%	2%	10%	27%	30%	25%
<b>Q47: I am satisfied with the level of support I receive from my town/village.</b>							
	4.25	4%	6%	13%	29%	34%	14%
<b>Q38: I am satisfied with the resources available to entrepreneurs and small businesses.</b>							
	4.21	3%	4%	14%	37%	31%	11%
<b>Q46: I am satisfied with the level of support I receive from Moore County.</b>							
	4.19	1%	8%	14%	36%	30%	11%

Items	Mean	Strongly Disagree	Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately Agree	Strongly Agree
<b>Q35: I am satisfied with the cost of living in Moore County.</b>							
	4.18	3%	10%	12%	29%	34%	12%
<b>Q45: I am satisfied with streets, roads, &amp; highway systems in Moore County.</b>							
	4.14	3%	8%	15%	30%	34%	10%
<b>Q42: I am satisfied with the availability of natural gas.</b>							
	4.10	8%	10%	10%	26%	30%	16%
<b>Q43: I am satisfied with the availability of reliable cell phone service.</b>							
	3.84	12%	14%	14%	15%	27%	18%

The majority (39%) of employers describe the overall business environment in Moore County today as better than compared to two years ago, and thirty-six percent (36%) believe it has not changed but is good. Nineteen percent (19%) believe it is worse, and six percent (6%) believe it has not changed, but is poor.

**Q28: Which of the following best describes the overall business atmosphere (workforce availability, regulatory environment, infrastructure availability, etc.) in Moore County today, compared to two years ago?**



## II. ClearPath Analytics

The preceding Results Section has captured a snapshot of organizational health by using descriptive statistics, such as means and benchmark scores. While these analyses facilitate an understanding of the state of the organization as it currently exists, they do not explain ‘why.’ As a result, the path to improvement is not immediately evident.

With limited time and resources, it is critical that Clients focus on those issues that will result in the greatest amount of improvement in the shortest amount of time. NBRI’s deep analytics (‘root cause analyses’) are conducted on each Client’s raw data and identify key drivers (psychological perceptions of the customer population) that are specific to each organization.

No two outcomes are the same. Root Causes are unique to each organization, and are a function of the management style, policies, employee behavior, communications, and so forth that determine the customer experience with the organization. Furthermore, Root Causes change over time. NBRI’s Proprietary Root Cause Analysis includes correlations; stepwise, linear regression analyses; random forest analyses which are used with proprietary, advanced machine learning algorithms; and a psychological path analysis conducted by Ph.D. Organizational Psychologists.

In simplified terms, NBRI randomly constructs 10,000 to 100,000 decision trees, made up of all possible combinations of the survey questions, and compares the mode of the classes (classification) or mean prediction (regression) of the individual trees. In these analyses, we move beyond a ‘state of the union’ to a revelation of the human perceptions that have the greatest impact on their behavior. This provides us with the shortest, clearest path to improve profitability.

To understand the Customer Experience, we examine its Root Causes: Overall Satisfaction and Willingness to Recommend. NBRI requires stringent levels of causation before asserting that one variable drives another, and we have proven, from decades of empirical research at a 99% confidence level and less than 1% sampling error, that these independent variables are driving the dependent variable of Customer Experience (CX) within their respective organizations. If Clients were to simply act on these two factors, they would achieve much toward improving CX.

However, NBRI goes deeper. Below, we provide the **drivers of the Root Causes of CX** within your organization, so that you can take targeted action at the single most important factors impacting your customers today! All root causes that account for 10% or more of the thinking and behavior of the target population are included in this report.

To maximize improvement in the Employer Experience of your organization, Moore County should now focus on the Root Causes (of the Root Causes of CX) identified below:

## EMPLOYER EXPERIENCE METRIC

57<sup>th</sup>

### Overall Satisfaction

I am satisfied with Moore County as a place to operate a business. (69<sup>th</sup>)

### Willing to Recommend

I would recommend Moore County as a business location. (45<sup>th</sup>)

**Overall Satisfaction.** Two (2) items have been identified as having the greatest impact on perceptions of Overall Satisfaction in employers, as measured by the item, “I am satisfied with Moore County as a place to operate a business” (69<sup>th</sup>). They are:

*Sandhills Community College is effective at generating a sufficient pipeline of skilled, well trained workers for our company.*

*I am satisfied with the overall image of Moore County.*

These items are the most important factors relative to Overall Satisfaction. That is, “Sandhills Community College is effective at generating a sufficient pipeline of skilled, well-trained workers for our company” and “I am satisfied with the overall image of Moore County” are driving Overall Satisfaction more so than any other variables.

**Willingness to Recommend.** Two (2) items have been identified as having the greatest impact on perceptions of Willingness to Recommend in employers, as measured by the item, “I would recommend Moore County as a business location” (45<sup>th</sup>). They are:

*Moore County Partners in Progress Economic Development staff are responsive.*  
*Moore County Chamber of Commerce staff provide a high level of service & support.*

These items are the most important factors relative to Willingness to Recommend. That is, “Moore County Partners in Progress Economic Development staff are responsive” and “Moore County Chamber of Commerce staff provide a high level of service & support” are driving Willingness to Recommend more so than any other variables.

In summary, the four (4) most important Root Causes that should be targeted for Moore County Customer Experience are shown below:

## **EMPLOYER EXPERIENCE METRIC**

57<sup>th</sup>

### **Overall Satisfaction**

I am satisfied with Moore County as a place to operate a business. (69<sup>th</sup>)

### **Responsiveness**

I would recommend Moore County as a business location. (45<sup>th</sup>)

Sandhills Community College is effective at generating a sufficient pipeline of skilled, well trained workers for our company.

I am satisfied with the overall image of Moore County.

Moore County Partners in Progress Economic Development staff are responsive.

Moore County Chamber of Commerce staff provide a high level of service & support.

Improving these Root Causes will affect the largest increases in the Employer Experience in the shortest amount of time. For this purpose, the scores of the Dependent and Independent Variables are of little importance. A driver may have a significantly higher or lower score than the variable it drives, but it will nevertheless have a more powerful influence than any other item in the question set. It is often the case that small changes in powerful drivers like Independent Variables will cause dramatic changes in the performance and score of the Dependent Variable.

### III. Champion Continuous Improvement

Now that the assessment is complete and the action areas identified, following up on survey results in a timely manner is as important as the purity of the data itself. With NBRI, Clients have the management information they need to take the proper steps at the proper times and achieve maximum improvement. The time to act is now!

There are three levels of options available to clients when it comes to taking action at this stage in the process:

#### Option 1: Executives identify most appropriate steps to take to address action areas

This approach gives complete control to Executive, using their knowledge and expertise to identify the most appropriate courses of action. While this may expedite the process, it does not build engagement and ownership amongst the employee population.

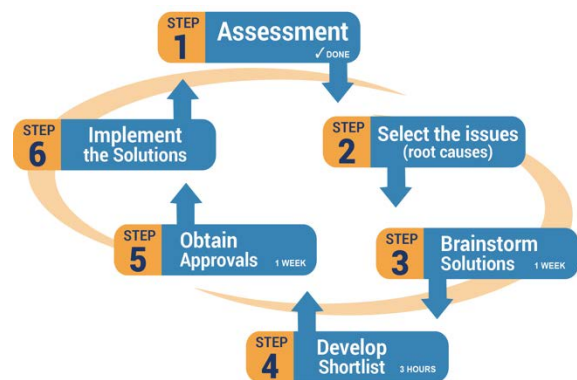
#### Option 2: Utilize Best Practice Solutions that have worked for other organizations

From our extensive experience with clients across a wide variety of industries, we have compiled Best Practice Solutions that have worked for others in various circumstances. Based on the Root Causes identified through this research, solutions that may impact change across your organization include:

- Develop a consistent brand image.
- Be careful about how the brand is used to ensure that the brand reflects the values/images the organization intends.
- Be proactive – use the right tools anticipate employer needs rather than reacting to them.
- Review current job training to improve skillset, making the employee more valuable to the organization.

#### Option 3: NBRI's Continuous Improvement Process

Our Continuous Improvement Process includes assessment, selecting issues, implementing solutions, and measuring again to quantify the effectiveness of the interventions and continue improving. **This is the highest and best use of employee and customer survey research.** In short, we assess, you act; we assess, you act, and together, we help you achieve continuous improvement in your employee and customer engagement and loyalty, leading to ever higher profit performance!





Steps 1 & 2 are now complete. The Assessment is over and the Root Causes of the psychology (the thinking and behavior) of the population are explained above.

We recommend involving all employees in Brainstorming for Solutions to the Root Causes. Employees have firsthand knowledge of both employee and customer issues and have formulated 'if only management would...' scenarios that may immediately improve the root causes! Action Teams, made up of middle managers with our training, sort the employee input into a shortlist of the very best recommendations. Next, Executives are presented with these recommendations and estimate the time and money requirements of each to decide what is to be approved. Executive Sponsors for approved interventions are assigned and move quickly to Implement the Solutions through the employees.

The power of this process itself cannot be overstated, as employees both propose the solutions and implement them. The ownership and engagement of the process energizes the entire organization when done properly.

Your Organizational Psychologist is available to assist you with these important interventions to the root causes of your customers' thinking and behavior, remotely or onsite, at highly competitive hourly or daily rates. Please contact your Research Consultant, Scott Atkins at [ScottAtkins@nbrii.com](mailto:ScottAtkins@nbrii.com) if you would like additional information.

**Critical success factors for achieving maximum ROI include:**

1. **the frequency** of collecting data, with best practice being a minimum of once per year for employees, and as often as possible for customers, given the population size;
2. **the timeliness** of taking action on the findings, with best practice being 30 to 60 days from the close of the survey;
3. **the effectiveness** of the actions taken, with best practice being the targeting of key drivers or root causes, and not necessarily the lowest scoring items; and,
4. **the communication** of actions taken, with best practice being that employees are well aware of management's interest in and actions relative to the employee and customer feedback.

**NBRI appreciates your business and enjoys working with you and your team! Please do not hesitate to contact us for any reason at [www.nbrii.com](http://www.nbrii.com) or 1.800.756.6168.**