



NC Community Engagement Survey for DECEMBER 2022

Executive Summary

The purpose of the NC Community Engagement Survey (NC CES) of community leaders is to measure trends in community wellness across North Carolina. The NC CES is sent via email monthly to community leaders throughout the state. See the appendix for a profile of all respondents.

The survey asks community leaders to assess local living conditions throughout North Carolina. Researchers use the data to monitor, evaluate, and compare the economic and social wellness in communities across the state. In December we examined six specific issues related to community wellness, including access to food, healthcare, housing, childcare, cellular service, and broadband access, as well as long-term and short-term measures of overall conditions.

The North Carolina Community Engagement Panel of community leaders who have responded to the survey stands at 1,675 members at the end of 2022 with the following characteristics:

- 412 community leaders responded in December across 98 of North Carolina’s 100 counties and all the state’s eight Prosperity Zones.
- 53.6% of all panelists report more than five years in their current community leadership roles, and 34.4% report ten or more years of tenure, with just 8.9% reporting less than one year.
- About 75% of panelists work in a municipal, county, or state government role and 13% work in local education. The balance of panelists are leaders in business, public health, faith-based, and social services organizations.

This report for December presents observations for the last six months in 2022.

The December 2022 NC CES generated the following noteworthy insights:

- **SHORT-TERM MEASURE OF COMMUNITY WELLNESS TURNS POSITIVE IN DECEMBER**
While community leaders were slightly less optimistic about the long-term changes in community conditions (since the onset of COVID), the short-term NIS entered the positive range for the first month since data collection began in May of 2022. The short-term measure of conditions (last 30 days) improved modestly to a +1.6 net improvement score in December from an NIS of -4.7 in November.
- **AFFORDABILITY OF NECESSITIES IMPROVED BUT REMAINS IN THE NEGATIVE NIS RANGE**
Affordability of necessities like food, housing, healthcare, and childcare improved substantially compared to November, with the average affordability rating becoming 14.5 points less negative in December. Nevertheless, all measures of affordability remained in the “declined” range.
- **ONLY THE SOUTHEAST AND PIEDMONT TRIAD LAG THE STATE IN 3 AREAS AS WELL AS OVERALL**

The Piedmont Triad and Southeast Prosperity Zones were the only areas lagging state-wide NIS levels for three of the six necessities measured as well as in the overall wellness. But the Sandhills zone lagged state averages in four necessities, including food, housing, healthcare, and cell service.

- **ALL MEASURES FOR NECESSITIES TRENDED UPWARD SINCE JULY BUT MOST REMAIN NEGATIVE**
NIS measures of access to food, healthcare, and eldercare all became somewhat more negative in December. Only healthcare and childcare access have worsened marginally since November. All NIS measures for necessities stayed in the “declined range” in December except cell service which registered a perfectly neutral NIS of 0.0, with 76.9% of respondents indicating “Stayed the same.” The largest improvement in access to necessities since July was in housing with an 11.9-point uptick.
- **THE ELDERLY AND FAMILIES WITH CHILDREN STILL FACE GREATER CHALLENGES**
Community leaders indicated that families with children and the elderly face greater challenges in access to necessities. While food and housing remained essentially unchanged since November with a solid majority of community leaders indicating conditions are harder for both subsets of households, measures for healthcare access for families with children and the elderly showed a modest decline in November, slipping by 3% for both groups.

The long-term measure of overall change (since onset of COVID) fell marginally lower in December from an NIS of 82.6 to 77.4, the first downward movement since June. Interestingly, the decline in the long-term NIS measure was largely caused by an uptick in neutral or “partially recovering” ratings. The percentage of “not recovering” responses for the long-term NIS measure has still never risen above the 3.2% mark in May and posted its smallest proportion in December at 1.3%.

Conversely, the short-term measure of overall change in community wellness made its first move into the net “Improved” range with a 6.3-point jump to +1.6 NIS. This December short-term NIS represents a 10.5-point increase over the six-month period. It is important to note that in December, more than half of respondents still gave a rating of “stayed the same” for the short-term measure, as in all the previous months. Measurements of necessities suggest that improvements in access and affordability of both food and housing account for this rise into positive NIS territory.

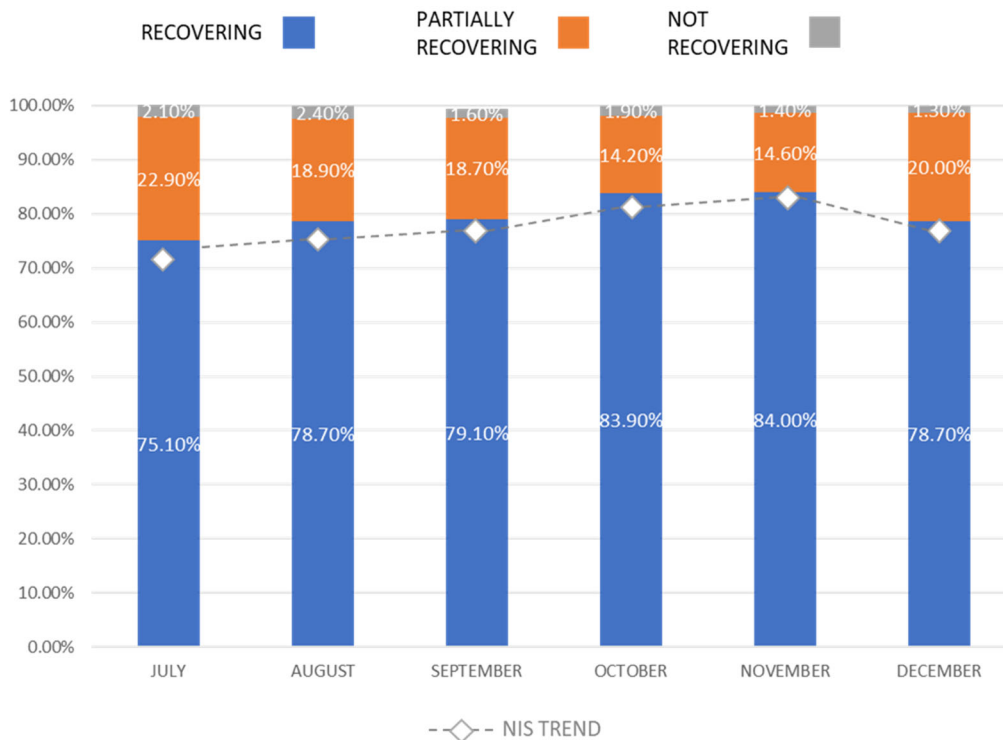


Long-Term and Short-Term Overall Net Improvement Scores* (NIS) of Conditions

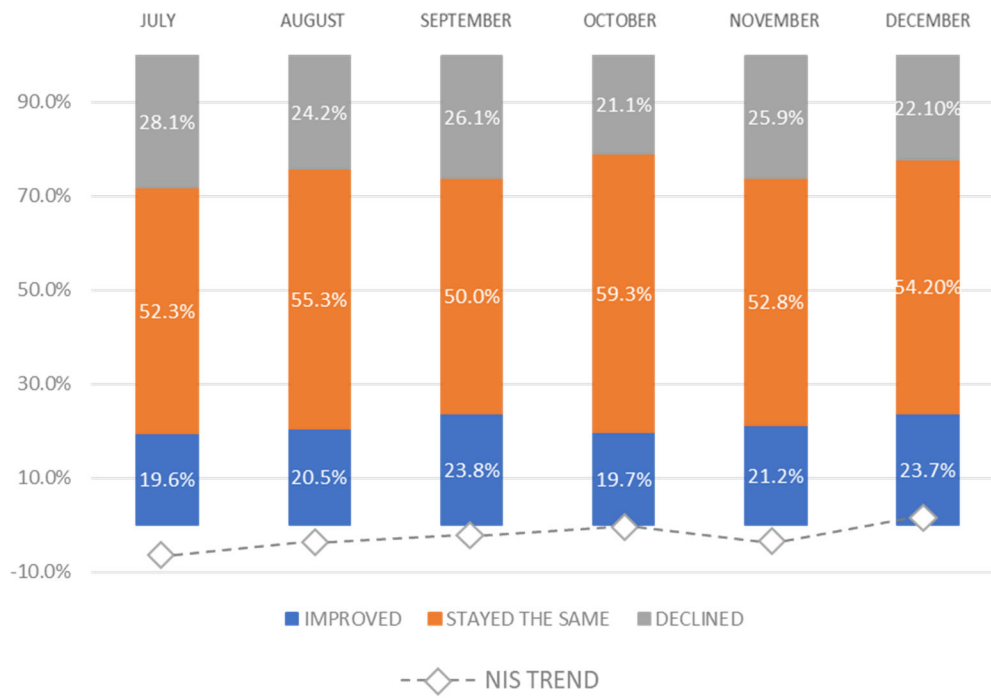
SINCE COVID	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
RECOVERING	75.1%	78.7%	79.1%	83.9%	84.0%	78.7%
PARTIAL	22.9%	18.9%	18.7%	14.2%	14.6%	20.0%
NOT RECOVERING	2.1%	2.4%	1.6%	1.9%	1.4%	1.3%
NIS*	+73.0	+76.3	+78.1	+82.0	+82.6	+77.4
LAST 30 DAYS	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
IMPROVED	19.6%	20.5%	23.8%	19.7%	21.2%	23.7%
STAYED THE SAME	52.3%	55.3%	50.0%	59.3%	52.8%	54.2%
DECLINED	28.1%	24.2%	26.1%	21.1%	25.9%	22.1%
NIS*	-8.5	-3.7	-2.3	-1.4	-4.7	+1.6

* Net Improvement Score (NIS) is the percent of positive responses minus the percent of negatives.

Long-term NIS Trend (since COVID) – 6 months from JULY to DECEMBER 2022



Short-term NIS Trend (last 30 days) – 6 months from JULY to DECEMBER 2022



Comparing Net Improvement Scores (NIS) by Access to Necessities – JULY to DECEMBER 2022

	July	August	September	October	November	December	6-mo. change
Food	-10.4	-0.7	-4.0	-8.9	-10.1	-0.4	+10.0
Housing	-34.1	-28.5	-22.9	-29.5	-28.8	-22.2	+11.9
Healthcare	-15.7	-4.2	-9.2	-10.8	-12.4	-14.4	+1.3
Childcare	-33.2	-27.5	-18.4	-27.5	-26.7	-27.2	+6.0
Cell service	*	*	*	-6.3	*	0.0	+6.3*
Broadband	*	*	*	-10.1	*	-1.1	+9.0*

* Data collection for eldercare, cell service, broadband, and transportation alternates by time periods

Measures of Access to Specific Necessities

While all six necessities measured in December remained in the net “declined” range, they all showed six-month upticks with increases ranging from 1.3 points for healthcare to 11.9 for housing. Healthcare and food access both showed particularly strong improvements in December compared to values in November. But healthcare and childcare both worsened from November to December.

While affordability ratings for necessities continue to be a concern, December results showed strong improvements from November. Food and housing affordability showed particular upward movement, posting 9.5 and 4.3-point gains, respectively. On average, all affordability measures posted 6.9% of responses in the “Improved” range while majority of ratings remained in the “Stayed the same” range.

NIS for Affordability of Necessities – with November to December 2022 NIS

	November NIS	December NIS	December Percent “Improved”
Food affordability	-60.1	-50.6	7.7%
Housing affordability	-47.9	-43.6	4.9%
Healthcare affordability	-22.4	-8.8	12.7%
Childcare affordability	-40.6	-39.4	3.5%
Cell service affordability	*	-12.5	7.1%
Broadband affordability	*	-15.0	5.4%
All affordability (mean)	-42.8	-28.3	6.9%

Differences across Prosperity Zones in North Carolina

Results across the eight Prosperity Zones in North Carolina continued to show significant contrasts from region to region. Four Prosperity Zones – Western, Northwest, North Central, and Southwest – trailed the state-wide NIS levels for childcare access while the Southwest, Piedmont Triad, Sandhills, and Southeast all trailed the state significantly for healthcare access. But, only two zones – the Southeast and Piedmont Triad – lagged state-wide averages in three of the six necessities measured AND in the overall monthly NIS. The Northwest, Piedmont



Triad, Northeast, Southeast zones all continued to post negative short-term overall NIS, well below the state-wide measure of +1.6 NIS.

November Net Improvement Scores (NIS) – Necessities by Prosperity Zones (Range -100 to +100)

	Food	Housing	Healthcare	Childcare	Cell	Web	Overall
Western	-6.5	-16.1	-6.7	-41.4%	-4.5	9.1	14.8
Northwest	3.3	-31.0	-3.4	-46.4%	4.2	20.8	-10.7
Southwest	-2.9	-21.2	-24.2	-33.3%	0.0	13.6	0.0
Piedmont Triad	-12.9	-23.3	-26.7	-26.7%	13.0	17.4	-10.7
North Central	4.3	-22.2	-4.3	-28.3%	6.1	15.2	8.9
Sandhills	-16.7	-26.1	-17.4	-21.7%	-13.3	0.0	4.8
Northeast	9.5	-26.2	-7.3	-12.5%	-18.5	4.4	-13.3
Southeast	-7.5	-21.1	-27.5	-27.5%	7.7	-14.8	-7.7
ALL NC	-0.4	-22.2	-14.4	-27.2	0.0	-1.1	+1.6

indicates NIS for the Prosperity Zone is significantly below state-wide average at $p \leq 0.05$

Percent who AGREE - Conditions are More Challenging for Families with Children and the Elderly (November and December 2022)

	NOVEMBER			DECEMBER		
	Food	Housing	Healthcare	Food	Housing	Healthcare
Families with children	58.3%	53.2%	43.1%	57.1%	55.0%	46.1%
Elderly households	62.8%	57.9%	47.7%	62.6%	57.3%	50.8%

When asked to compare conditions for young families and the elderly to all households in NC, a majority of leaders still agree that these two groups have more challenges accessing food and housing. Healthcare conditions for these households are rated somewhat better, but conditions declined marginally since November.

Conclusions

While the improvements in short-term measurement for December seem to be contradicted by the dip in the long-term measure, the two metrics are intended to track different things. The long-term measure of community wellness (since the onset of COVID) ask for comparisons to a fixed point in the past and uses a scale reflecting this kind of comparison – from fully recovered to getting worse. The short-term measurement asks for comparisons in the last 30-days, thus calling for a different base comparison each month. The modest slippage in the long-term measurement is due to an increase in the neutral rating of “partial recovering.” The uptick in the short-term measure was caused by an increase in “Improved” ratings compared to a month ago. The short-term increase in overall community wellness is attributable to improvements in access to two necessities that have been particularly negative in past months – food and housing.

The NC Community Engagement Survey has received responses from more than 1,600 unique community leaders across the state since its inception in May with monthly responses averaging more than $n = 420$. In that

period, community leaders have painted a picture of NC communities that are still working on key recovery issues, especially affordability of necessities, but making steady progress across the board leading to the first overall positive short-term NIS in December.



Appendix A

Panelists Compared to Population by Prosperity Zones

	Percent of all	Percent of pop.	Counties Represented
Western	11.8%	7.0%	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, Polk, Rutherford, Swain, Transylvania
Northwest	10.9%	5.9%	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest	11.5%	23.1%	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	12.7%	16.5%	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	18.5%	24.4%	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	8.9%	8.1%	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	12.1%	4.9%	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	13.5%	10.1%	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne
ALL	100.0%	100.0%	

Time in Leadership Position for all Panelists

TENURE	Percent of all
Less than one year	8.9%
One to two years	13.5%
Three to five years	23.9%
Six to ten years	19.2%
More than ten years	34.4%
TOTAL	100.0%
More than five years	53.6%

Areas of Community Leadership for all Panelists

	Role in the Community	Percent
1	Arts & culture	0.3%
2	Business & commerce	2.7%
3	County government	14.3%
4	Education – Childcare, Early	1.4%
5	Education - K-12	9.1%
6	Education - Postsecondary	2.1%
7	Faith-based organizations	2.2%
8	Food & nutrition	0.6%
9	Housing	0.2%
10	Labor & workforce	1.0%
11	Libraries	0.5%
12	Municipal government	61.0%
13	Public health	0.7%
14	Regional planning	2.1%
15	Social services	1.6%
16	Tribal organizations	0.2%
	TOTAL	100.0%
	ALL GOVERNMENT	75.3%
	ALL EDUCATION	13.0%

Appendix B

Background

The **NC Community Engagement Survey** is a monthly survey that solicits timely insights into the state of community conditions across North Carolina. The approach monitors, measures, and evaluates the impact of economic and social interruptions found at the substate level. The survey results help measure the progress toward recovery from these interruptions and help strengthen regional economic resilience.

The design is inspired by the U.S. Census Household Pulse Survey, which provides statewide data on several topics related to COVID-19. The **NC Community Engagement Survey** seeks participation from community leaders in each county to share their perspectives on regional and local trends related to housing, broadband, food access, education, and more. The survey is a shared resource among project partners seeking to generate and analyze local community health.

The objective is to obtain statistically relevant results for every county in the state. Currently substate results are only provided by Prosperity Zones. Regional results, for groups such as the Councils of Government or individual counties, will be provided when appropriate.

The **NC Community Engagement Survey** was launched in May 2022 by the NC Pandemic Recovery Office. The Survey is being conducted by researchers from East Carolina University and is funded through a grant to the Governor's Office from the U.S. Economic Development Administration. The grant also will support additional, related research efforts over the next two years.

Supporters of the **NC Community Engagement Survey** include the UNC School of Government ncIMPACT Initiative, the NC Rural Center, the NC Association of County Commissioners, and the NC League of Municipalities.

For questions about the survey, please contact NCPRO by reaching out to [Andy McCracken](#) or [Dr. Jim Kleckley](#). Survey administration and analysis is coordinated by East Carolina University faculty [Dr. William \(Jason\) Rowe](#) and [Dr. Russ Lemken](#).