

## NC Community Engagement Survey for JANUARY 2023

### 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 conditions throughout North Carolina. Researchers use the data to monitor the social wellness in communities across the state. In January we examined five issues related to community wellness – access to food, healthcare, housing, childcare, and eldercare, as well as long and short-term measures of overall wellness. We use a metric called Net Improvement Score (NIS), which is the percent of positive assessments minus the percent of negative.

Beginning with this January 2023 report, each month we will give greater focus to a single area or issue in North Carolina community wellness. This month we will drill down into the survey results concerning access to and affordability of childcare in North Carolina. A synopsis begins on page six.

The North Carolina Community Engagement Panel of community leaders who have responded to the survey stands at 2,075 members as of January with the following characteristics:

- 745 community leaders responded in January across 99 of North Carolina’s 100 counties and all the state’s eight Prosperity Zones.
- 53.8% of all panelists report more than five years in their current community leadership roles, and 35.2% report ten or more years of tenure, with just 9.7% reporting less than one year.
- About 73% of panelists work in a municipal, county, or state government role and 11.4% work in local education. The balance of panelists are leaders in business, public health, faith-based, and social services organizations.

This report for January presents observations for August 2022 through the end of January 2023.

The January 2023 NC CES generated the following noteworthy insights:

- **BOTH SHORT AND LONG-TERM MEASURES LOSE SUBSTANTIAL GROUND IN JANUARY**  
January saw both the long and short-term Net Improvement Scores for community wellness dip sharply. In particular, the short-term measure of community conditions fell by double-digit points from NIS of +1.6 to -12.9, returning to the negative range.
- **AFFORDABILITY OF NECESSITIES DECLINED AND REMAINS IN THE NEGATIVE NIS RANGE**  
On average, affordability of all necessities, like food and childcare, declined by 10.6 points since December, with three of the four necessities tracked monthly judged less affordable. Housing and healthcare saw the steepest declines in affordability, dropping 11.1 and 20.4 NIS points in one month, respectively. All measures of affordability remained in the “declined” range. These declines in affordability of necessities are likely a factor behind the drop in overall assessments.

- **ONLY WESTERN, NORTHEAST, AND SOUTHEAST LAG THE STATE IN 3 OF 5 NECESSITIES**  
The Western, Northeast, and Southeast Prosperity Zones were the only areas lagging state-wide NIS levels for three of the five specific necessities measured in January. In addition to these three zones, the Northwest region also lagged the state-wide NIS score for overall 30-day assessments.
- **AFTER A RISE IN DECEMBER, ACCESS TO 4 OF 5 SPECIFIC NECESSITIES FELL IN JANUARY**  
Measures of access to food, housing, healthcare, and eldercare all became somewhat more negative in January 2023 compared to December and to six months earlier. Only childcare access improved in January. All NIS measures for necessities remained solidly in the “declined range,” averaging an NIS of -23.6 in January.
- **THE ELDERLY AND FAMILIES WITH CHILDREN CONTINUE TO FACE GREATER CHALLENGES**  
Community leaders continue to agree that families with children and elderly households face greater challenges in access to necessities compared to other households in North Carolina. The only necessity where a minority of leaders agree that young families and the elderly face greater challenges is healthcare, where 45.8% and 47.9% percent agree, respectively.

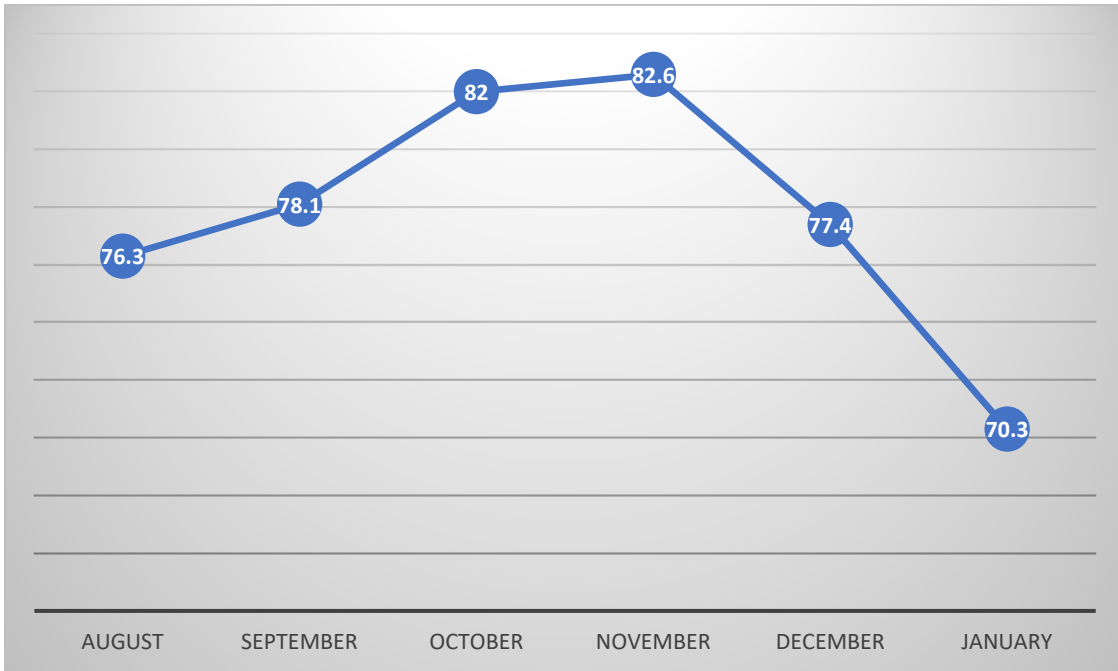
The long-term and short-term measures of overall community wellness in North Carolina fell together in January, posting the biggest one-month losses in NIS points since the inception of the study. The percentage of “not recovering” responses for the long-term NIS measure grew by 1.4 percentage points compared to December but remained below 3.0%. The largest drop came in the short-term measure of wellness where the percentage indicating conditions “declined” in the last 30-days grew by 7.6 percentage points, from 22.1% to 29.7%. This increase in negative assessments resulted in a 14.3-point drop in the short-term overall NIS, returning the measure to the net “declined” range after a one-month stay in the net “improved” range.

The long-term overall measure also fell in January, but by fewer NIS points, dropping from an NIS of +77.4 to +70.3, a 7.1 point one-month decline or roughly half that of the short-term overall measure. Although there are likely multiple causes of the decline in both short and long-term overall measures, the substantial decline in affordability and access to three necessities in January, food, housing, and healthcare are likely factors.

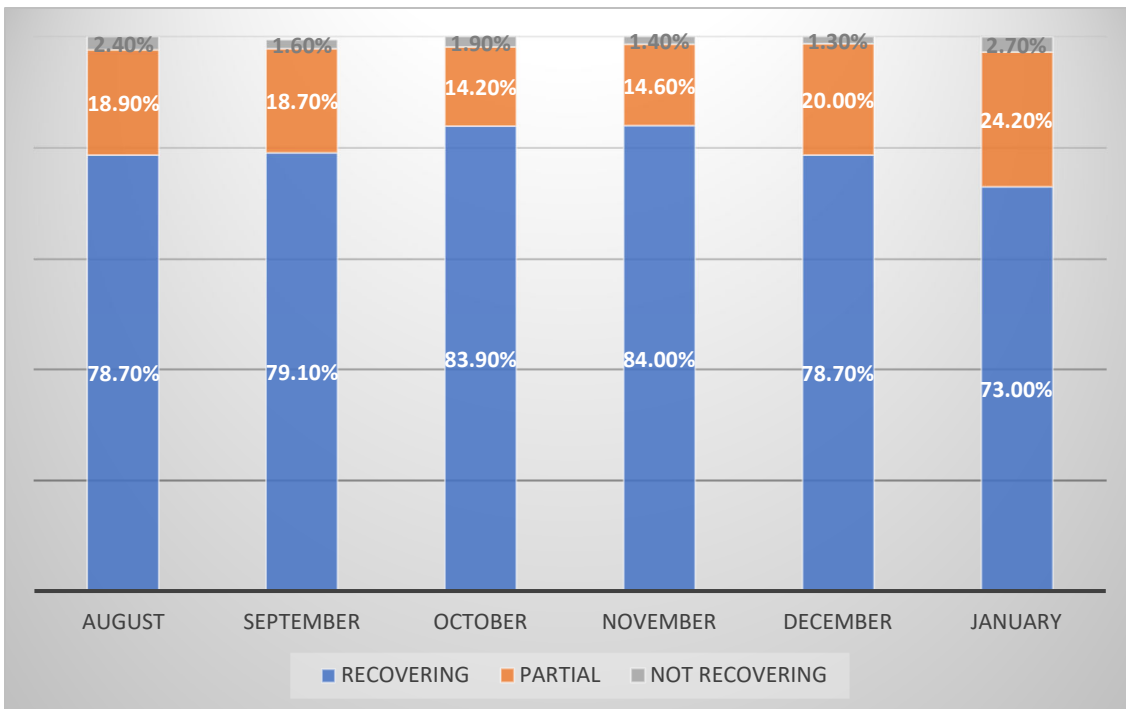
Long-Term and Short-Term Overall Net Improvement Scores\* (NIS) of Conditions

<b>SINCE COVID</b>	<b>AUGUST</b>	<b>SEPTEMBER</b>	<b>OCTOBER</b>	<b>NOVEMBER</b>	<b>DECEMBER</b>	<b>JANUARY</b>
<b>RECOVERING</b>	78.7%	79.1%	83.9%	84.0%	78.7%	73.0%
<b>PARTIAL</b>	18.9%	18.7%	14.2%	14.6%	20.0%	24.2%
<b>NOT RECOVERING</b>	2.4%	1.6%	1.9%	1.4%	1.3%	2.7%
<b>NIS</b>	+76.3	+78.1	+82.0	+82.6	+77.4	+70.3
<b>LAST 30 DAYS</b>	<b>AUGUST</b>	<b>SEPTEMBER</b>	<b>OCTOBER</b>	<b>NOVEMBER</b>	<b>DECEMBER</b>	<b>JANUARY</b>
<b>IMPROVED</b>	20.5%	23.8%	19.7%	21.2%	23.7%	16.8%
<b>STAYED THE SAME</b>	55.3%	50.0%	59.3%	52.8%	54.2%	53.5%
<b>DECLINED</b>	24.2%	26.1%	21.1%	25.9%	22.1%	29.7%
<b>NIS</b>	-3.7	-2.3	-1.4	-4.7	+1.6	-12.9

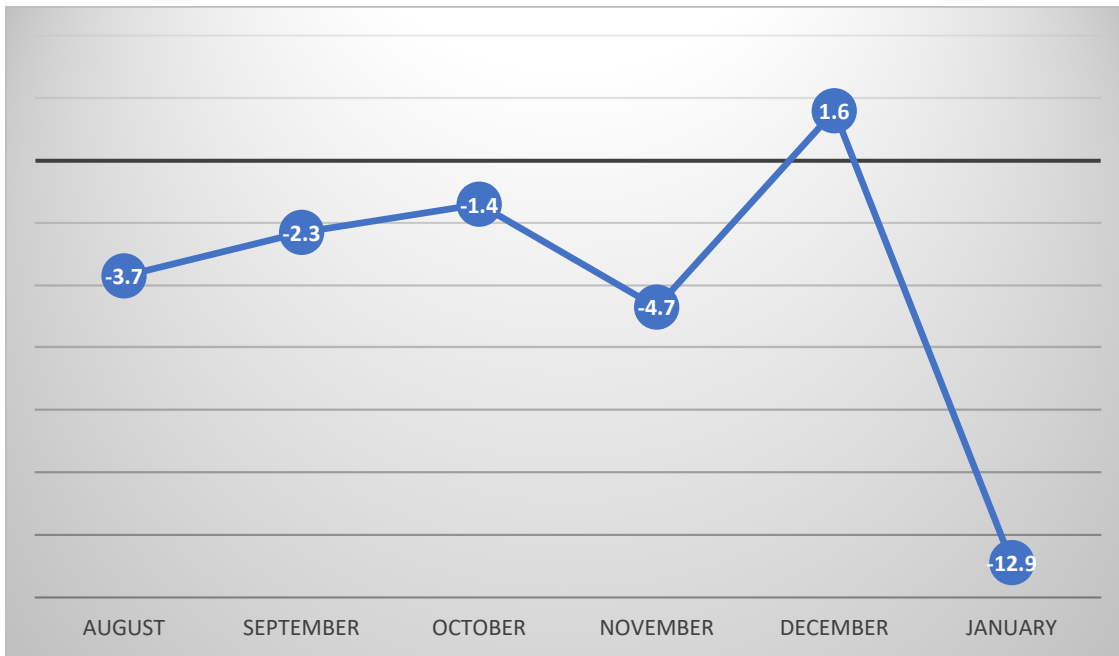
Long-term NIS Trend (since COVID) – 6 months from AUGUST to JANUARY



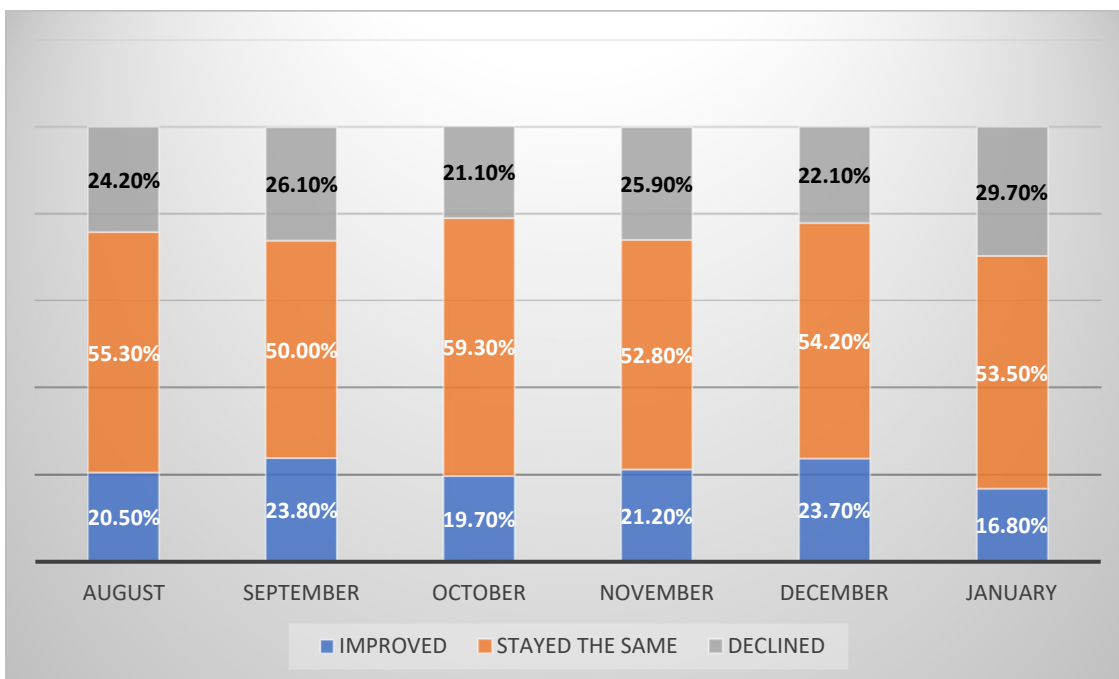
Long-term NIS percentage details (since COVID) – 6 months from AUGUST to JANUARY



Short-term NIS Trend (last 30 days) – 6 months from AUGUST to JANUARY



Short-term NIS percentage details (last 30 days) – 6 months from AUGUST to JANUARY



### Comparing Net Improvement Scores (NIS) by Access to Necessities – JULY to JANUARY 2023

	Aug	Sep	Oct	Nov	Dec	January	6-mo. change
<b>Food</b>	-0.7	-4.0	-8.9	-10.1	-0.4	-16.1	-15.4
<b>Housing</b>	-28.5	-22.9	-29.5	-28.8	-22.2	-37.1	-8.6
<b>Healthcare</b>	-4.2	-9.2	-10.8	-12.4	-14.4	-17.8	-13.6
<b>Childcare</b>	-27.5	-18.4	-27.5	-26.7	-27.2	-19.8	+7.7
<b>Eldercare</b>	*	-20.4	*	-28.7	*	-27.2	-6.8

\* Data collection for eldercare alternates by time periods

#### Measures of Access to Specific Necessities

All five necessities measured in January remained in the net “declined” range, and four showed six-month declines, ranging from drops of 15.4 points for food access to 6.8 points for eldercare access. Childcare access was the only necessity to show a six-month improvement, rising 7.7 NIS points since August. This six-month improvement is almost identical to the one-month change of 7.4 points.

Affordability ratings for necessities in January continue to be a concern, remaining squarely in the “declined” range of the NIS scale. Like the measurements of access to necessities, January results showed improvement in only one area since November – childcare affordability. Healthcare and housing affordability showed the steepest two-month declines with both affordability NIS measures 6.8 points lower. On average, all affordability measures fell by 3.4 NIS points and the January values for affordability range from -63.7 for food to -29.2 for healthcare.

#### NIS for Affordability of Necessities – with November to January 2023 NIS

	November NIS	December NIS	January NIS	Two-month change
<b>Food affordability</b>	-60.1	-50.6	-63.7	-3.6
<b>Housing affordability</b>	-47.9	-43.6	-54.7	-6.8
<b>Healthcare affordability</b>	-22.4	-8.8	-29.2	-6.8
<b>Childcare affordability</b>	-40.6	-39.4	-37.0	+3.6
<b>All affordability (mean)</b>	-42.75	-35.6	-46.15	-3.4

\* Data collection for eldercare alternates by time periods

#### 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, and areas of improvement and decline have also varied from month-to-month. For example, four Prosperity Zones – Western, Northwest, North Central, and Southwest – trailed the state-wide NIS levels for three or more necessities in December, whereas the Western, Northeast, and Southeast trailed the state overall in January. This month, the Northeast and Sandhills Prosperity zones trailed the state in overall wellness NIS by the most, with overall NIS of -23.1 and -19.4, respectively, compared to the statewide short-term NIS of -12.9.



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

	Food	Housing	Healthcare	Childcare	Eldercare	Overall
<b>Western</b>	-20.4	-42.9	-12.8	-26.5	-22.4	-18.2
<b>Northwest</b>	-6.8	-40.7	-13.6	-11.9	-24.1	-14.3
<b>Southwest</b>	-11.8	-13.7	-11.8	0.0	-23.5	0.0
<b>Piedmont Triad</b>	-4.3	-30.4	-15.9	-17.4	-25.0	-8.7
<b>North Central</b>	-20.2	-37.1	-7.9	-28.7	-30.0	-11.9
<b>Sandhills</b>	-11.6	-23.2	-4.3	-11.9	-19.4	-19.4
<b>Northeast</b>	-25.5	-57.7	-37.8	-30.2	-40.8	-23.1
<b>Southeast</b>	-22.9	-38.1	-17.9	-23.5	-25.3	-4.1
<b>ALL NC</b>	-16.1	-37.1	-17.8	-19.8	-27.2	-12.9

*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 January 2023)

	December 2022			January 2023		
	Food	Housing	Healthcare	Food	Housing	Healthcare
<b>Families with children</b>	57.1%	55.0%	46.1%	56.3%	57.5%	45.8%
<b>Elderly households</b>	62.6%	57.3%	50.8%	59.7%	57.4%	47.9%

When asked to compare conditions for young families and the elderly to all households in NC, most leaders continue to 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 for housing and healthcare since December.

A Deep Dive into Childcare Conditions in North Carolina Communities

According to January results, childcare access is the third most important community necessity of the seven studied, with access to housing and food the only others ranked higher. See page eleven for a ranking of all community necessities. Our deeper dive into childcare data collected since May of 2022 shows two distinct trends. First and mostly importantly, childcare access has remained in the “declined” range of the NIS scale for short-term measures since the inception of the study and is usually among the two most negatively rated necessities. But in September and January, a pattern emerged that shows a periodic but short-term improvement in ratings of access to childcare. From August to September, ratings of access to childcare improved 9.1 NIS points, and from December to January, the ratings improved by 7.4 points. A careful reading of the comments about childcare offered a possible explanation of these sporadic and short-lived upticks in access. September and January are both back-to-school months that follow the longest vacation breaks in the school year. Thus, these months see a short-term and modest reprieve in two related forces that severely impact childcare access – shortage of daycare facility (DCF) capacity and shortage of DCF staff.

Almost 400 of the 745 respondents to the January North Carolina Community Engagement Survey offered specific comments about the state of childcare in North Carolina. This large sample of open-ended responses provides a wide array of perspectives that focused on three recurring themes – availability of DCF capacity, the rising costs of childcare, and the specific impacts of the COVID pandemic on the provision of childcare in North Carolina.

Fully one-third of comments offered by North Carolina community leaders across the entire state made some mention of the lack of availability of affordable childcare. For example, leaders from Polk, Forsyth, and Dare counties all made specific reference to crisis-level issues. These counties reach across the state, with Polk in the Western Prosperity Zone, Forsyth in the Piedmont-Triad, and Dare in the Northeast zone. Said one commenter,

**“Childcare in Dare County is limited and expensive. Every option has a wait list, and many families even after waiting have a hard time affording it. More childcare options, as well as grants for childcare, would improve this situation.”**

Said another,

**“There are no formal childcare facilities in Polk County. I believe people are meeting to address the problem but so far nothing has changed.”**

In fact, many other commenters also addressed the intractable nature of the problem of getting access to childcare in the state. Numerous leaders offered comments similar to this,

**“The shortage of childcare has remained steady for some time now. Childcare facilities have continued to close and the ones that are operational are too expensive.”**

The problem of access to DCFs has been exacerbated by the rise in housing costs, according to a few commenters. The shortage of affordable housing makes the travel time to available DCFs longer for many young families. This just adds to their costs and time pressures.

More than half of all comments mention the rising costs of childcare in the state. These cost pressures are a particular burden for the youngest parents who are most likely to be limited to low wage jobs. Said a community leader from Pitt County,

**“Many parents aren’t able to afford childcare, and some feel they’re paying out more money than they are able to earn from low paying jobs.”**

Other leaders pointed out that many jobs that have been added back to local economies since COVID simply do not pay enough to make childcare a possibility. Another leader from Dare County commented,

**“Parents cannot find affordable before and after-school care, so latch key kids are normal here since parents work two and sometimes three jobs to make ends meet. Many working parents here make just enough that they fail to qualify for assistance or support.”**

Finally, COVID has put especially onerous pressure on DCFs across the state. Many daycare providers have closed due to liability concerns from children contracting COVID and Respiratory syncytial virus (RSV) and bringing the illnesses home to siblings and parents. Also, COVID has made the perennial problem of finding and hiring teachers and caregivers for DCF even more of a challenge. Said one leader,

**“Lack of staff continues to be the major problem – no one wants to go back to working in childcare with the risk of COVID. Also, daycare staff feel obliged to send children home at the first sign of sickness, then tell the family the child can’t return for 3 days.”**

In all, the results of the North Carolina Community Engagement Survey have consistently highlighted chronic problems associated with the access to affordable childcare. These findings point to dire needs for families with children that are not being met. Moreover, challenges with childcare seem to be worsening.

### Conclusions

The short-term overall measurement for January took a significant dip compared to December and showed a more modest six-month decline, finishing back in the negative range of the NIS scale at -12.9. The long-term overall measure of community wellness (since the onset of COVID) also declined in January, but by a smaller increment compared to the short-term drop. The causes of both overall declines can be seen in the worsening access and affordability of three different necessities, food, housing, and healthcare. Childcare access continues to be a chronic problem for communities across the state, although NC CES data show a modest cyclicity in childcare measures due to an easing of pressure during back-to-school periods.

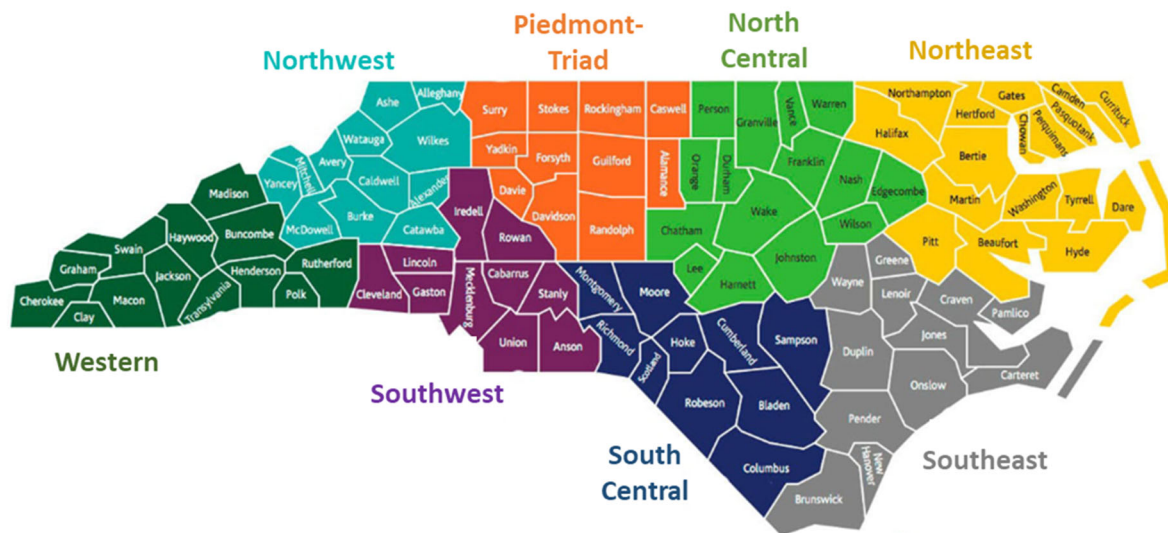
The deep dive into childcare challenges in the state showed three main trends, declining access to childcare providers, increasing costs of daycare, and a long-term shortage of childcare workers which was exacerbated by the pressure of the COVID pandemic.

The NC Community Engagement Survey has received responses from more than 2,000 different community leaders across the state since its inception. And while most leaders assess the long-term recovering from COVID positively (73%), the measure of long-term progress declined in January, pointing to challenges in community wellness that many North Carolinians are still trying to tackle.



Appendix A

Prosperity Zones in North Carolina



Panelists Compared to Population by Prosperity Zones

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

### Time in Leadership Position for all Panelists

<b>Tenure in position</b>	<b>Percent of all</b>
<b>Less than one year</b>	9.7%
<b>One to two years</b>	13.7%
<b>Three to five years</b>	22.9%
<b>Six to ten years</b>	18.6%
<b>More than ten years</b>	35.2%
<b>TOTAL</b>	<b>100.0%</b>
<b>More than five years</b>	<b>53.8%</b>

### Areas of Community Leadership for all Panelists

	<b>Role in the Community</b>	<b>Percent</b>
<b>1</b>	<b>Arts &amp; culture</b>	0.3%
<b>2</b>	<b>Business &amp; commerce</b>	2.9%
<b>3</b>	<b>County government</b>	21.0%
<b>4</b>	<b>Education – Childcare, Early</b>	1.1%
<b>5</b>	<b>Education - K-12</b>	7.5%
<b>6</b>	<b>Education - Postsecondary</b>	1.9%
<b>7</b>	<b>Faith-based organizations</b>	1.9%
<b>8</b>	<b>Food &amp; nutrition</b>	0.8%
<b>9</b>	<b>Housing</b>	0.2%
<b>10</b>	<b>Labor &amp; workforce</b>	0.9%
<b>11</b>	<b>Libraries</b>	1.0%
<b>12</b>	<b>Municipal government</b>	52.0%
<b>13</b>	<b>Public health</b>	2.5%
<b>14</b>	<b>Regional planning</b>	1.9%
<b>15</b>	<b>Social services</b>	3.0%
<b>16</b>	<b>Tribal organizations</b>	0.3%
<b>17</b>	<b>Federal, state government</b>	0.2%
<b>18</b>	<b>Public safety, law enforcement</b>	0.8%
	<b>TOTAL</b>	<b>100.0%</b>
	<b>ALL GOVERNMENT</b>	<b>73.1%</b>
	<b>ALL EDUCATION</b>	<b>11.4%</b>

### Specific Issues in Community Conditions – January 2023 Rank Order of Importance

<i>Access to:</i>	<b>Mean Rank</b>	<b>Implied Rank</b>
<b>Housing</b>	2.56	1
<b>Food</b>	2.73	2
<b>Childcare</b>	3.29	3
<b>Healthcare</b>	3.74	4
<b>Eldercare</b>	4.71	5
<b>Technology</b>	5.42	T6
<b>Transportation</b>	5.54	T6

### Recurring Themes from Childcare Comments in January

- Costs of childcare continue to rise, affordability is worsening
- Closure of DCFs
- Lack of affordable housing – longer drives to daycare facilities (DCF)
- Employment – having one parent stay home
- COVID impacts daycare workers disproportionately
- COVID concerns are keeping some families away increasing latchkey kids
- Waitlists at many facilities are growing due to staff shortages
- COVID has increased DCF concerns about liability
- The post-COVID employment rebound has been mostly low-paying jobs
- Shortage of childcare givers due to perennially low wages they are paid
- COVID relief funds are no longer helping some families
- Childcare is a long-term, chronic issue for most NC communities
- Far more latchkey kids is a child well-welfare and safety concern
- A large, unmet need, especially for low-wage families

## 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](#).*