

NC Community Engagement Survey for June 2022

Executive Summary

The purpose of the NC Community Engagement Survey (NC CES) of community leaders is to measure and track trends in pandemic recovery across North Carolina. The NC CES is sent via email monthly to community leaders throughout the state.

Every month, the survey solicits timely information about how NC communities are recovering from the pandemic and preparing for the future. Researchers use the data to monitor, evaluate, and compare the economic and social impact of the pandemic on communities across the state.

Observations drawn from the data are used to measure progress toward full pandemic recovery and help to further strengthen the resilience of all communities across the state by sharing practical insights among community leaders.

The June survey questions cover six specific issues related to pandemic recovery, including access to cell phone service, broadband, food, healthcare, housing, and childcare, as well as long-term and short-term measures of overall recovery in NC communities.

Participation in the June survey by community leaders across the state produced the following:

- 372 total responses recorded across 92 of North Carolina's 100 counties and all the state's eight Prosperity Zones.
- 59% of all respondents reported more than five years of tenure in their current leadership role, and 36% reported ten or more years of tenure.
- More than 67% of all respondents work in a municipal or county government capacity and 21% work in local education. The balance of respondents are leaders in business, public health, faith-based, and social services organizations.

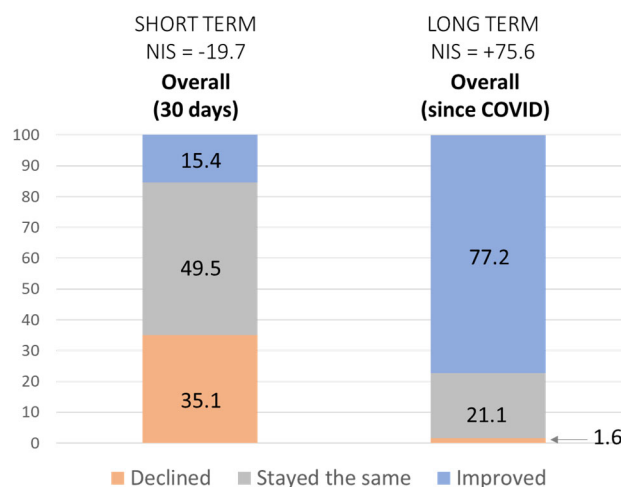
The June survey provided excellent coverage of the state – data was recorded for 92 of 100 counties and for all 8 Prosperity Zones. June respondents are an experienced group of community leaders with diverse representation in their roles and geographical locations.

The resulting data set provides initial insights needed to help guide current pandemic recovery efforts across North Carolina. In addition, the survey results for June provide an important comparison point to May results and will allow researchers to track periodic changes in pandemic recovery conditions and monitor a trend line of improvement in communities.

The June 2022 NC CES generated the following noteworthy insights:

- **LONG-TERM MEASURES OF PROGRESS REMAIN MORE OPTIMISTIC THAN SHORT-TERM**
Community leaders across North Carolina are much more optimistic about long-term improvement since the onset of COVID compared to their view of short-term progress in pandemic recovery. This gap between long and short-term views widened in June.
- **AFFORDABILITY OF NECESSITIES IS STILL A CONCERN**
Respondents also continue to rate the affordability of necessities negatively – like food, healthcare, childcare, and housing – reflecting ongoing concerns about rising prices.
- **PANDEMIC RECOVERY CONTINUES TO BE UNEVEN ACROSS REGIONS**
Pandemic recovery has not been even in regions across NC. Five (of the eight) Prosperity Zones in the state have lower ratings than the state-wide mean in four or more areas of recovery – the Western, South Central, Northwest, Southwest, and Northeast zones.
- **KEY AREAS OF SHORT-TERM PANDEMIC RECOVERY DECLINED IN JUNE**
Three of the six measures of specific recovery areas – food, healthcare, and childcare – have dropped compared to May. Only the housing measure has improved, but it remains the most negative issue with a Net Improvement Score¹ (NIS) of -38. The two new measures of technology conditions in June are both modestly negative (NIS for access to cell phone service is -1.0 and broadband is -8.6).
- **THE ELDERLY AND FAMILIES WITH CHILDREN ARE STILL A CONCERN**
A clear majority (more than 55%) of community leaders also agreed that all six recovery areas were even a greater challenge for families with children and for the elderly.

The long-term measure of change (since onset of COVID) remains significantly more optimistic compared to the short-term measure (last 30 days), as it was in May.



¹ Net Improvement Score (NIS) is the percent of positive responses minus the percent of negatives.

Comparing Results by Specific Recovery Issues – May versus June 2022

Recovery Issues	May NIS	June NIS	Change in NIS*
Cell service	n/a	-1.0	n/a
Broadband	n/a	-8.6	n/a
Food	-10.7	-22.5	-11.8
Housing	-45.7	-38.0	7.7
Healthcare	-14.2	-22.6	-8.4
Childcare	-33.2	-37.8	-4.6

Differences across Prosperity Zones in North Carolina

Pandemic recovery conditions continue to vary across the state. In the table below, the mean rating values for the six pandemic recovery issues are highlighted when that Prosperity Zone is below the average for the state. Five Prosperity Zones have four or more pandemic recovery measures that are below the state-wide average – Western, Northwest, Southwest, South Central, and Northeast. The Western and Southwest regions joined the Northwest, South Central, and Northeast regions from May.

Mean Ratings for Recovery Issues by Prosperity Zones (improvement scale of one to seven)

JUNE RESULTS	Cellphone	Broadband	Food	Housing	Healthcare	Childcare	Overall
Western	3.81	4.00	3.62	2.91	3.43	3.02	3.45
Northwest	4.03	4.00	3.44	3.27	3.60	3.21	3.59
Southwest	4.10	3.81	3.51	3.25	3.72	3.21	3.71
Piedmont-Triad	4.24	3.87	3.78	3.28	3.70	3.25	3.79
North Central	4.18	4.00	3.73	3.30	3.91	3.46	3.81
South Central	3.71	3.60	3.31	3.53	3.35	3.23	3.67
Northeast	3.64	3.52	3.28	3.42	3.32	3.21	3.23
Southeast	4.03	3.95	3.84	3.54	3.56	3.42	4.03
ALL NORTH CAROLINA	3.98	3.86	3.58	3.30	3.59	3.25	3.67

MAY RESULTS	Food	Housing	Healthcare	Childcare	Overall
Western	3.18	2.42	4.02	3.12	4.38
Northwest	3.13	2.57	4.08	3.00	3.97
Southwest	3.29	3.00	4.51	3.20	4.40
Piedmont-Triad	3.47	2.94	4.37	3.45	4.27
North Central	3.17	2.70	4.19	3.12	4.38
South Central	2.98	2.69	3.78	2.90	4.52
Northeast	2.76	2.74	3.83	3.47	4.18
Southeast	3.49	2.95	4.12	3.11	4.39
ALL NORTH CAROLINA	3.18	2.75	4.11	3.17	4.35

Conclusions

In summary, measurements of short-term changes in pandemic recovery conditions remain largely neutral or “stayed the same” (4 on 1 – 7 scale) over the last 30 days, indicating pandemic recovery has stalled to some extent. Across all short-term measurements of progress, more than 56% of respondents gave neutral ratings. This is also shown by the mean ratings for all measures that are in the range of 3.25 and 3.98 on a scale of one to seven.

The long-term measure of change in pandemic recovery conditions (since COVID) is even more optimistic than it was in May and remains much more positive than short-term measures. All specific issues in the recovery except housing became more negative than they were last month.

Appendix A

Are Recovery Issues More Challenging for Families with Children and the Elderly? (uses agreement scale 1 – 7)

	For families w/children	For the elderly
Food	5.01	5.07
Housing	4.96	4.94
Healthcare	4.63	4.72
Cell service	4.13	4.44
Broadband	4.69	4.79
ALL ISSUES	4.68	4.79

When asked if specific recovery issues – like housing or healthcare access – were more of a challenge for families with children or the elderly, community leaders indicated that access to food and housing was significantly more challenging compared to the other issues measured, like cellphone, broadband, and healthcare access. Nevertheless, most values for these questions about families with children and the elderly were between four and five on a seven-point agreement scale (i.e. neutral or slightly above) indicating the difference was modest.

More Challenging for Families with Children and the Elderly by Prosperity Zone (uses agreement scale 1 – 7)

	All Family Issues	All Elderly Issues
Western	5.30	5.42
Northwest	5.09	5.19
Southwest	4.35	4.49
Piedmont-Triad	4.49	4.65
North Central	4.60	4.55
Sandhills	4.84	4.93
Northeast	4.81	4.94
Southeast	4.10	4.23
ALL NC	4.68	4.79

Community leaders in four Prosperity Zones – Western, Northwest, Sandhills, and Northeast – agreed that recovery challenges were greater for both families with children and the elderly compared to the community as a whole.

More Challenging for Families with Children by Prosperity Zone (uses agreement scale 1 – 7)

	All family	Cellphone	Broadband	Food	Housing	Healthcare
Western	5.30	4.85	5.32	5.36	5.76	5.12
Northwest	5.09	4.31	5.03	5.69	5.47	4.86
Southwest	4.35	3.79	4.14	4.86	4.56	4.23
Piedmont-Triad	4.49	3.63	4.29	5.16	4.86	4.49
North Central	4.60	3.84	4.26	4.94	5.07	4.79
Sandhills	4.84	4.63	5.34	4.97	4.75	4.43
Northeast	4.81	4.39	5.09	4.77	4.94	5.00
Southeast	4.10	3.69	4.26	4.37	4.16	4.14
ALL NC	4.68	4.13	4.69	5.01	4.96	4.63

Greater Challenges for the Elderly by Prosperity Zone (uses agreement scale 1 – 7)

	All Elderly	Cellphone	Broadband	Food	Housing	Healthcare
Western	5.42	5.07	5.36	5.47	5.68	5.17
Northwest	5.19	4.81	5.13	5.65	5.47	4.87
Southwest	4.49	4.12	4.38	4.98	4.59	4.25
Piedmont-Triad	4.65	4.08	4.47	5.14	4.78	4.82
North Central	4.55	3.96	4.40	4.92	5.00	4.77
Sandhills	4.93	5.09	5.31	4.97	4.78	4.63
Northeast	4.94	4.58	5.33	4.78	5.06	5.22
Southeast	4.23	4.03	4.18	4.68	4.08	4.06
ALL NC	4.79	4.44	4.79	5.07	4.94	4.72

Rank Order of Importance for Recovery Issues

	Mean Rank	% Ranked 1 st or 2 nd	Implied Rank
Food	2.56	58.4%	1
Housing	2.73	54.8	2*
Childcare	3.46	28.5	3*
Healthcare	3.89	21.7	4*
Technology	4.95	15.3	5
Eldercare	4.98	11.4	6*
Transportation	5.43	10.0	7

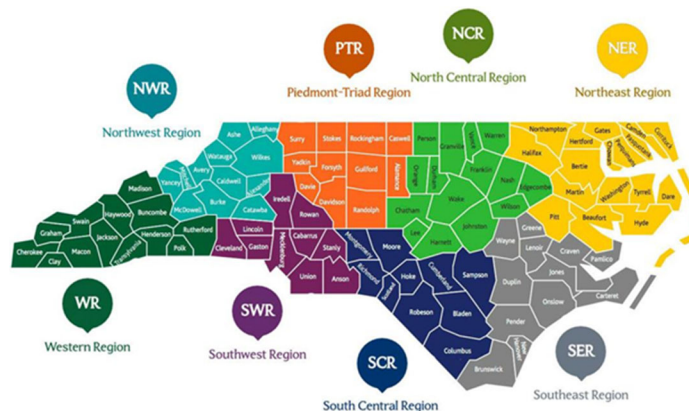
* Indicates the issue's rank is significantly different than the next lowest item

Percent that Ranked Each Issue 1st or 2nd in Importance by Prosperity Zone

	Eldercare	Food	Housing	Healthcare	Childcare	Tech	Transport	Top Ranked
Western	9.1%	43.2%	75.0%	13.6%	36.4%	18.2%	4.5%	Housing
Northwest	9.7%	51.6%	51.6%	19.4%	45.2%	16.1%	6.5%	Food/Housing
Southwest	17.6%	64.7%	55.9%	14.7%	26.5%	14.7%	5.9%	Food
Piedmont-Triad	11.4%	62.9%	40.0%	25.7%	40.0%	8.6%	11.4%	Food
North Central	12.2%	56.1%	61.0%	22.0%	14.6%	14.6%	19.5%	Housing
Sandhills	12.9%	67.7%	54.8%	19.4%	19.4%	16.1%	9.7%	Food
Northeast	6.7%	60.0%	50.0%	33.3%	26.7%	16.7%	6.7%	Food
Southeast	11.4%	65.7%	42.9%	28.6%	20.0%	17.1%	14.3%	Food
ALL NC	11.4%	58.4%	54.8%	21.7%	28.5%	15.3%	10.0%	Food
Implied Rank	6	1	2	4	3	5	7	Food

Responses by Prosperity Zones

	Freq.	Percent	Counties Represented
Western	49	13.2	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson , Macon, , Madison, Polk, Rutherford, Swain, Transylvania
Northwest	40	10.8	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest	51	13.7	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	47	12.6	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	68	18.3	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	36	9.7	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	38	10.2	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	43	11.6	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne
ALL	372	100.0	



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 will monitor, measure, and evaluate the impact of economic and social interruptions found at the substate level. The survey results will 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 will be 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. Regional results, for groups such as the Councils of Government and the Prosperity Zones, 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 will support additional, related research efforts over the next two years.

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](#).