

NC Community Engagement Survey for August 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.

The August survey covers five specific issues related to pandemic recovery, including access to food, healthcare, housing, childcare, and transportation, as well as long-term and short-term measures of overall recovery in NC communities. This is the first month measuring access to transportation.

The survey panel members are community leaders from across the state with the following characteristics:

- 460 community leaders responded in August across 97 of North Carolina's 100 counties and all the state's eight Prosperity Zones.
- 55% of all respondents report more than five years in their current leadership roles, and 36% report ten or more years of tenure, with just 7% indicating less than one year in their roles.
- More than 72% of all respondents work in a municipal, county, or state government role and 19% work in local education. The balance of respondents are leaders in business, public health, faith-based, and social services organizations.

The monthly survey data tracks the state of pandemic recovery efforts at the community level across all of North Carolina. This report for August is the first opportunity to present trends across four time-periods for each question. Consequently, the time-based trends in the data are a helpful indicator of the overall trajectory of community wellness efforts across North Carolina.

The August 2022 NC CES generated the following noteworthy insights:

- **BOTH THE LONG-TERM AND SHORT-TERM MEASURES OF PROGRESS IMPROVED SLIGHTLY**
The short-term measure of conditions (last 30 day) remains somewhat negative (net improvement score or NIS of -3.7) but inched up in August compared to July. Community leaders across North Carolina remain more optimistic about long-term recovery, and the long-term measure (since the onset of COVID) also improved a bit in August to an NIS of +76.3, matching the short-term improvements in August. The long-term measure has remained positive for all four periods.
- **AFFORDABILITY OF NECESSITIES IMPROVED AGAIN IN AUGUST BUT REMAIN A CONCERN**
August respondents rated the affordability of all necessities measured (Food, Housing, Healthcare, Childcare, and Transportation) more positively than in the prior four months, but all measures of

affordability of necessities remained in the negative range. Food and Healthcare showed the largest one-month improvements in affordability ratings.

▪ **REGIONS OF NC CONTINUE TO EXPERIENCE HIGHLY VARYING IMPROVEMENTS**

Ratings of pandemic recovery from community leaders in different geographical regions of NC indicate that gains continue to be uneven. Three (of the eight) Prosperity Zones (PZs) in the state have lower ratings than the state-wide mean in four or more areas of recovery in August – the Western, Northwest, and Northeast zones. The Northwest and Northeast zones have lagged state-wide averages for all four months of the survey so far. It is also notable that results for the Western and North Central zones declined most in overall recovery from May to August (slipping 22.3% and 16.7% respectively).

▪ **KEY AREAS OF SHORT-TERM PANDEMIC RECOVERY IMPROVED marginally IN AUGUST**

Four measures of specific recovery areas – access to food, healthcare, housing, and childcare – improved slightly in August. Nevertheless, all five Net Improvement Scores (NIS) of changes in specific recovery areas remained in the negative range. Housing and Childcare continue to receive the lowest ratings (NIS of -28.5 and -27.5 respectively).

▪ **SOME IMPROVEMENT FOR THE ELDERLY AND FAMILIES WITH CHILDREN**

In August, most community leaders still report that recovery challenges are greater for families with children and for the elderly. However, as in July, ratings of conditions for families with children and the elderly improved slightly compared to the prior month.

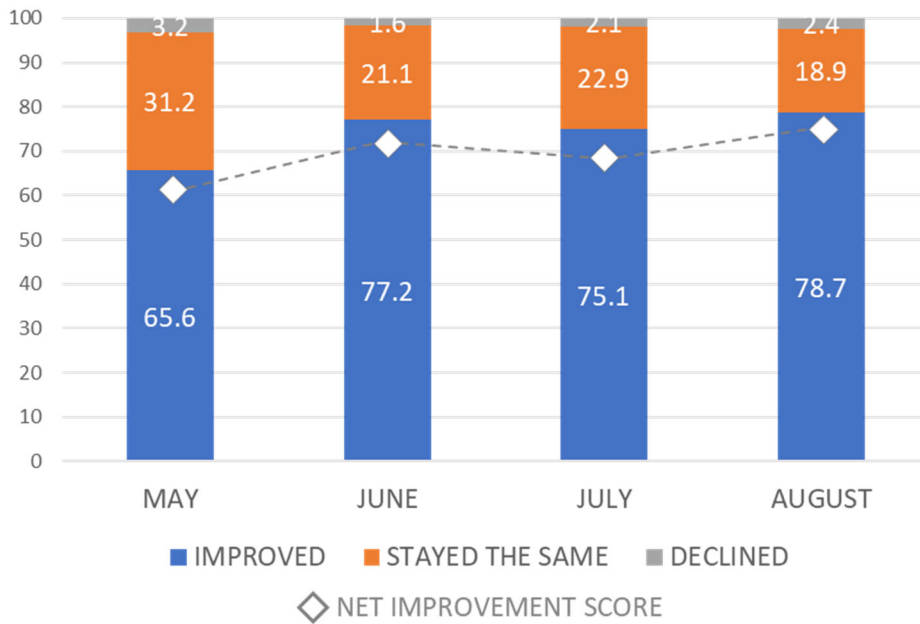
The long-term measure of overall change (since onset of COVID) remain more optimistic compared to the short-term measure in August with a positive Net Improvement Score (NIS) of 76.3 compared to the short-term overall NIS of -3.7. While the long-term measure of recovery has remained relatively steady and positive, the short-term measure (last 30-days) has continued its upward trend in August but still lingers in the negative range of the measure. As in earlier months, most responses about overall short-term recovery indicated “stayed the same” (4 on 1 – 7 scale) in August. For the five specific areas of recovery (access to food, healthcare, housing, childcare, and transportation), the most respondents still indicate “stayed the same” (ranging from 73.5% to 55.3%).

Long-Term and Short-Term Net Improvement Scores* (NIS) of COVID Recovery

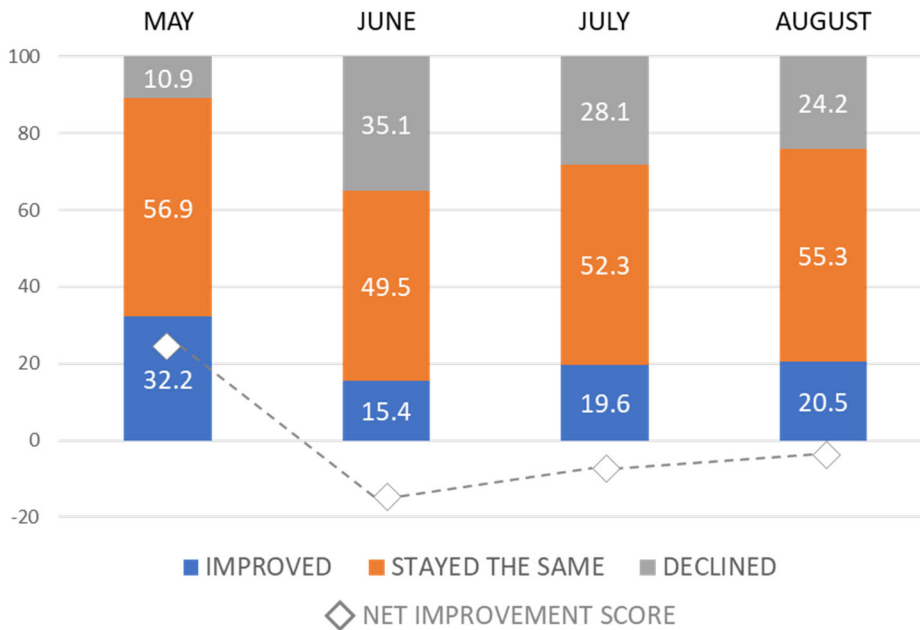
	Long-Term (since COVID)				Short-Term (last 30 days)			
	May	June	July	August	May	June	July	August
NIS*	62.4	75.6	73.0	76.3	21.3	-19.7	-8.5	-3.7
Improved	65.6	77.2	75.1	78.7	32.2	15.4	19.6	20.5
Stayed the same	31.2	21.1	22.9	18.9	56.9	49.5	52.3	55.3
Declined	3.2	1.6	2.1	2.4	10.9	35.1	28.1	24.2

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

Long-term measurement (since COVID) of Improvement in Conditions



Short-term measurement (last 30 days) of Improvement in Conditions

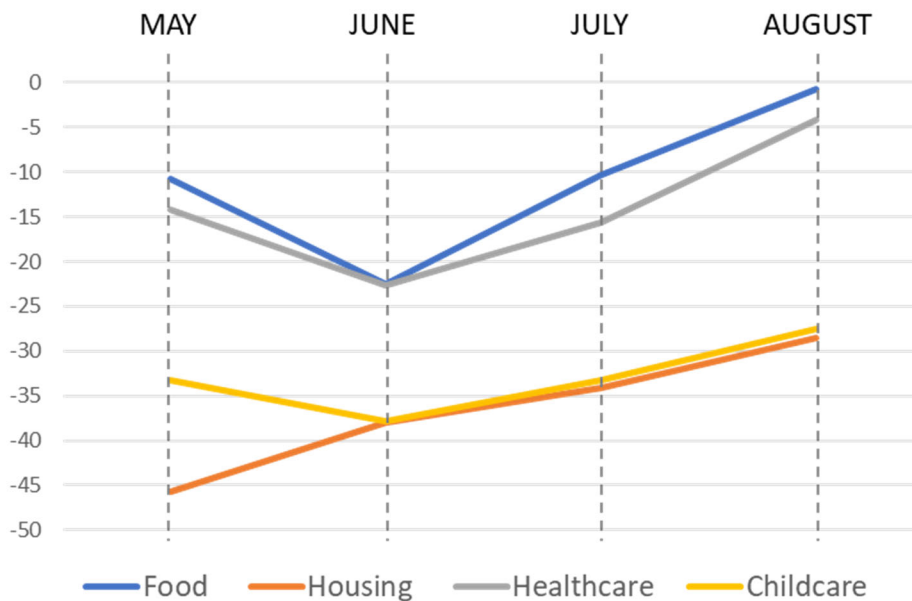


Comparing Results by Specific Recovery Issues – May to August 2022

Recovery Issues	May NIS	June NIS	July NIS	August NIS
Food	-10.7	-22.5	-10.4	-0.7
Housing	-45.7	-38.0	-34.1	-28.5
Healthcare	-14.2	-22.6	-15.7	-4.2
Childcare	-33.2	-37.8	-33.2	-27.5
Transportation	n/a	n/a	n/a	-15.3*

* First month data was collected

NIS Trends for Specific Recovery Areas – May to August 2022



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 five pandemic recovery issues are highlighted in light red when that Prosperity Zone is below the average for the state. As in July, three Prosperity Zones have four or more pandemic recovery measures below the state-wide average – Western, Northwest, and Northeast. The Northwest, Southwest, Sandhills, and Northeast Prosperity Zones all had overall monthly measures of improvement lag the overall measure for the entire state.

August Mean Ratings for Recovery Issues by Prosperity Zones (scale of 1 - 7)

	Food	Housing	Healthcare	Childcare	Transportation	Overall
Western	3.80	2.93	3.77	3.42	3.74	3.67
Northwest	3.83	3.28	3.84	3.33	3.68	4.03
Southwest	3.92	3.48	3.93	3.58	3.82	3.93
Piedmont-Triad	4.05	3.66	3.71	3.66	3.73	4.03
North Central	4.15	3.62	3.93	3.58	3.89	3.95
Sandhills	3.83	3.89	4.11	3.68	4.11	4.08
Northeast	3.67	3.07	3.78	3.37	3.56	3.62
Southeast	4.34	3.78	3.86	3.74	3.82	4.20
ALL NC	3.96	3.46	3.86	3.55	3.79	3.93

indicates ratings for the Prosperity Zone are below state-wide averages

Trend in Mean Ratings for Prosperity Zones (July to August 2022)

	Food	Housing	Healthcare	Childcare	Overall
Western	1.3%	0.3%	2.4%	6.9%	2.5%
Northwest	2.4%	1.2%	7.3%	1.2%	1.5%
Southwest	-5.5%	-1.7%	1.6%	2.0%	-4.4%
Piedmont-Triad	7.7%	3.4%	-0.3%	3.4%	5.2%
North Central	5.1%	11.0%	0.5%	5.3%	5.3%
Sandhills	9.1%	14.7%	2.0%	7.6%	2.0%
Northeast	5.8%	-1.6%	17.8%	4.3%	-0.8%
Southeast	11.9%	3.6%	1.3%	5.4%	5.5%
ALL NC	4.2%	3.9%	3.2%	4.4%	2.1%

indicates one-month changes for the Prosperity Zone lagged change for all of NC

Are Conditions More Challenging for Families with Children and the Elderly?
(Agreement scale 1 – 7)

	For families w/children JULY	For families w/children AUGUST	For the elderly JULY	For the elderly AUGUST
Food	4.79	4.65	5.01	4.75
Housing	4.85	4.66	4.95	4.66
Healthcare	4.71	4.39	4.78	4.45
Transportation	n/a	4.45	n/a	4.56
ALL ISSUES	4.78	4.54	4.91	4.61

When asked if specific recovery issues – like access to 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 still more challenging with agreement ratings ranging from 4.39 to 4.75 in August on a seven-point agreement scale. As in July, all these ratings of conditions for families and the elderly improved slightly compared to the prior month.

Conclusions

According to North Carolina community leaders, changes in conditions continue to be mainly defined as “stayed the same” (4 on 1 – 7 scale) in August. The upward trend in ratings reported in July continued though, with both short-term and long-rating net improvement scores improving slightly. But all short-term measures remain in the negative range of the scale (less than 4 on a scale of 1 to 7 and a negative NIS).

Overall, changes from July to August were mostly positive. Even housing and healthcare, the two most negatively rated areas of community well-being, showed modest improvements.

Pandemic recovery continues to vary widely across North Carolina’s eight Prosperity Zones. In August, the Western, Northwest, and Northeast zones showed the most negative results compared to all of North Carolina. The Northwest and Northeast are the only zones to lag state-wide averages in all four months of data collection – May, June, July, and August of 2022.

Appendix A

Respondents Compared to Population by Prosperity Zones

	Resp.	Pop.	Counties Represented
Western	13.5%	7.0%	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, , Madison, Polk, Rutherford, Swain, Transylvania
Northwest	10.7%	5.9	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest	12.0%	23.1	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	12.3%	16.5	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	17.5%	24.4	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	9.4%	8.1	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	11.1%	4.9	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	13.4%	10.1	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne
ALL	100.0%	100.0%	

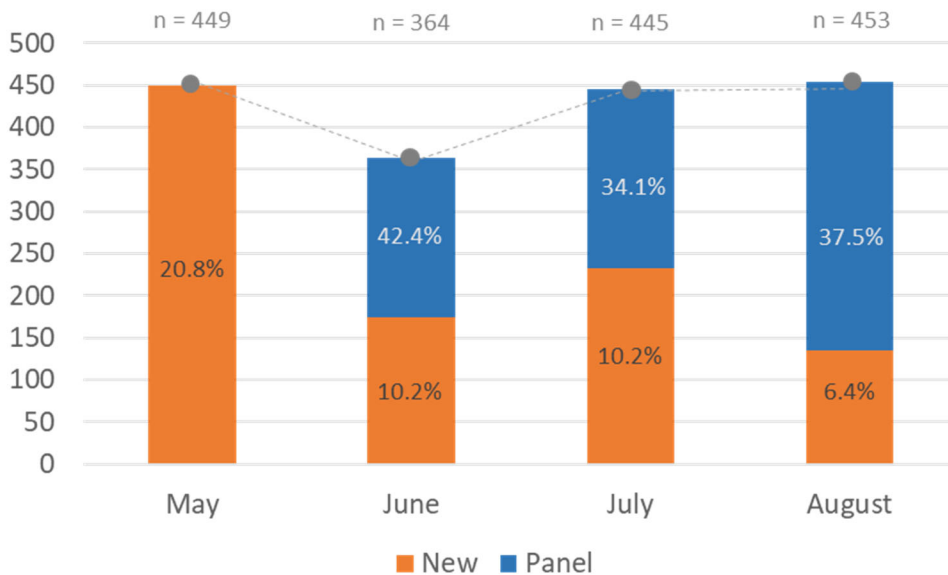
Time in Leadership Position for all Respondents to Date

TENURE	Percent
Less than one year	6.9%
One to two years	14.2
Three to five years	23.7
Six to ten years	19.5
More than ten years	35.6
TOTAL	100.0%
More than five years	55.2%

Areas of Community Leadership for all Respondents to Date

AREA OF LEADERSHIP		
1	Arts & culture	0.5%
2	Business & commerce	2.1%
3	County government	7.9%
4	Education – Childcare, Early	2.0%
5	Education - K-12	12.9%
6	Education - Postsecondary	3.0%
7	Faith-based organizations	1.6%
8	Food & nutrition	0.8%
9	Housing	0.3%
10	Labor & workforce	0.5%
11	Libraries	0.8%
12	Municipal government	64.2%
13	Public health	0.8%
14	Regional planning	0.8%
15	Social services	1.3%
16	Tribal organizations	0.4%
	TOTAL	100.0%
	ALL GOVERNMENT	72.2%
	ALL EDUCATION	18.7%

Building the Community Leader Panel – Sample composition and response rate (May – August)



NOTE: Response rates for new and panel respondents shown within stacked boxes

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.

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](#).