NC Community Engagement Survey for OCTOBER 2022

Executive Summary

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

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 across the state. In October we examined six specific issues related to pandemic recovery, including access to food, healthcare, housing, childcare, and cell phone and broadband services, as well as long-term and short-term measures of overall recovery.

The North Carolina Community Engagement Panel of community leaders grew to 1,330 members in October with the following characteristics:

- 455 community leaders responded in October across 98 of North Carolina's 100 counties and all the state's eight Prosperity Zones.
- 54% of all panelists report more than five years in their current leadership roles, and 34.5% report ten or more years of tenure, with just 7.7% indicating less than one year in their roles.
- About 74% of panelists work in a municipal, county, or state government role and 16% work in local education. The balance of panelists are leaders in business, public health, faith-based, and social services organizations.

This report for October presents observations for six time periods and focuses on trends since May.

The October 2022 NC CES generated the following noteworthy insights:

- **LONG AND SHORT-TERM MEASURES OF ACCESS TO NECESSITIES MAINTAIN UPWARD TREND**
  Community leaders remain very optimistic about the long-term recovery (since the onset of COVID), with an NIS of +82.0, an increase of 31.3% since the initial measurement for May. The short-term measure of conditions (last 30 days) remains marginally negative in October at -1.4.
- **INFLATION IS CLEARLY REFLECTED IN OCTOBER AFFORDABILITY MEASURES**
  Affordability of necessities like food, housing, healthcare, and childcare trended upward by more than 14% on average since May. But all measures of affordability remained in the "declined" range.
- **TWO REGIONS SIGNIFICANTLY LAG STATE-WIDE MEASURES FOR 6-MONTH IMPROVEMENT**
  The Piedmont Triad and North Central Prosperity Zones are the only two regions lagging state-wide 6-month improvements for access to three or more necessities. Nevertheless, all regions have posted improvements in access to most necessities over the past 6 months. The only recovery issues where prosperity zones report worsening conditions over the last 6 months are food access in the Western, Piedmont-Triad, and Sandhills, and childcare access in the Western and Piedmont-Triad regions.

- **MEASURES FOR ALL NECESSITIES REMAIN NEGATIVE DESPITE 6-MONTH IMPROVEMENTS**
  The six-month trends in changes to net improvement scores for the four necessities tracked monthly – access to food, housing, healthcare, and childcare – were all upward, averaging a change of 23.3% less negative. But all results remained in the "declined range" in October. Despite these net negative values for NIS, specific issues received a majority (63.3% of all responses) of "stayed the same" responses (4 on 7-point scale) in October. The two issues in pandemic recovery with the most negative ratings continue to be access to housing and childcare despite the 6-month improvements.

- **THE ELDERLY AND FAMILIES WITH CHILDREN FACE GREATER CHALLENGES IN RECOVERY**
  Community leaders agreed families with children and the elderly face greater challenges in access to necessities compared with all NC households. On an encouraging note, measures of challenges for families and the elderly have improved (become less negative) by 5.9% over the last six months.

The long-term measure of overall change (since onset of COVID) is very positive and improving in October, with a Net Improvement Score (NIS) of +82.0. This measure of long-term recovery has increased significantly since May when the NIS was +62.4. The short-term measure of overall change in community conditions remains slightly negative at -1.4 but has also improved significantly since June when the month-to-month NIS was -19.7. The short-term measure (last 30-days) has improved steadily since June, with the largest gain made in July, when the measure became less negative by 57%. For the short-term measure, 59.3% of respondents indicated "stayed the same" in October.

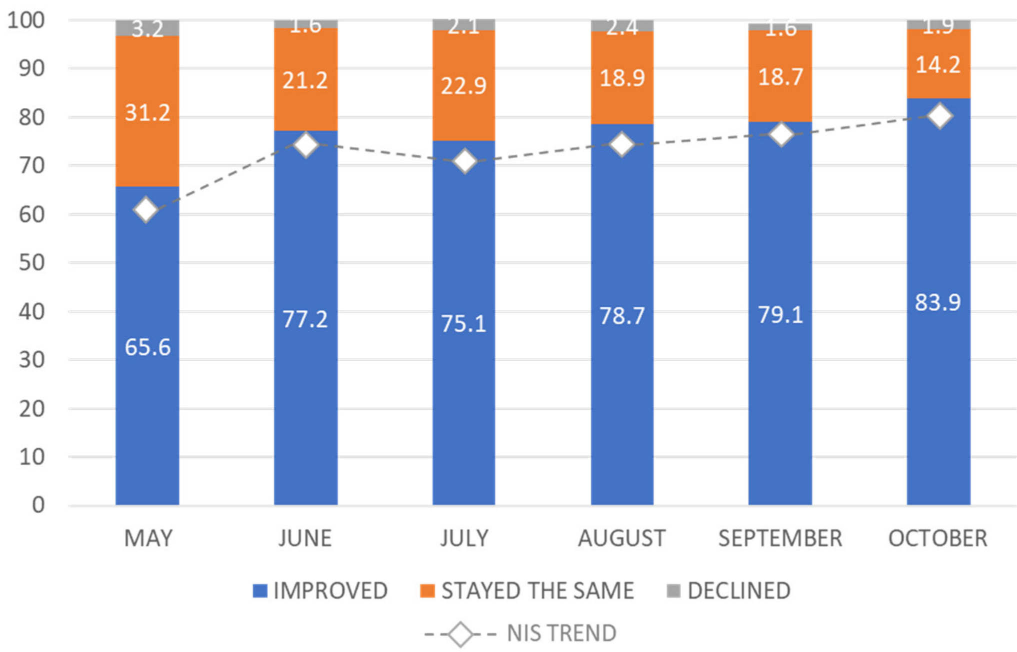
Long-Term and Short-Term Net Improvement Scores* (NIS) of COVID Recovery

SINCE COVID	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER
IMPROVED	65.6	77.2	75.1	78.7	79.1	83.9
STAYED THE SAME	31.2	21.2	22.9	18.9	18.7	14.2
DECLINED	3.2	1.6	2.1	2.4	1.6	1.9
NIS*	+62.4	+75.6	+73.0	+76.3	+78.1	+82.0

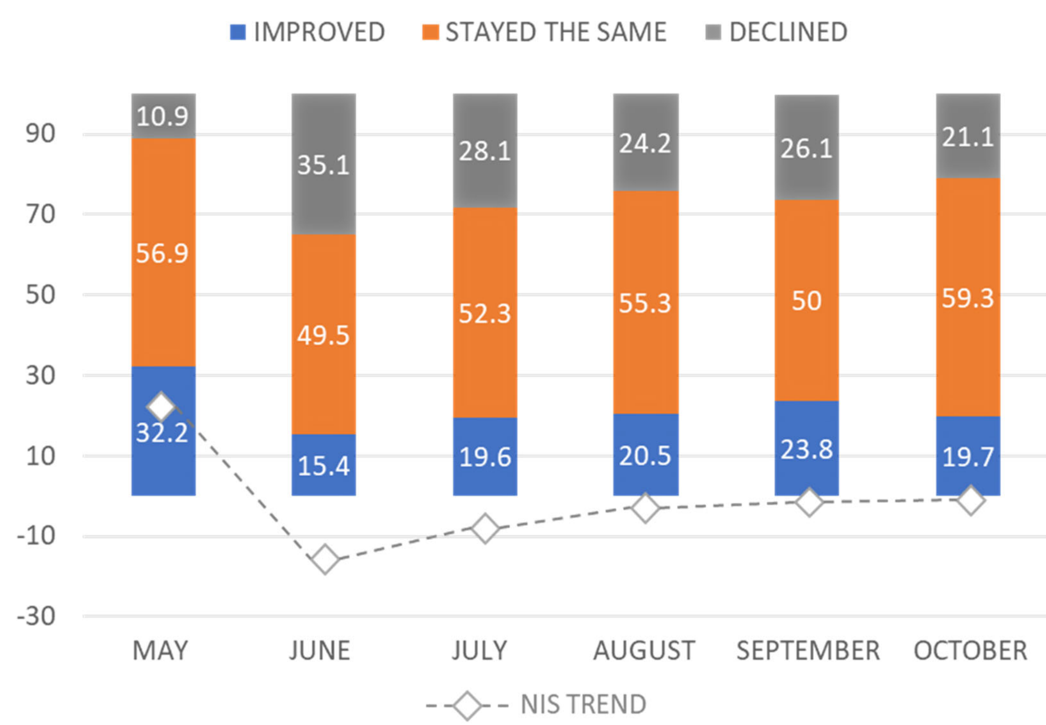
LAST 30 DAYS	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER
IMPROVED	32.2	15.4	19.6	20.5	23.8	19.7
STAYED THE SAME	56.9	49.5	52.3	55.3	50.0	59.3
DECLINED	10.9	35.1	28.1	24.2	26.1	21.1
NIS*	21.3	-19.7	-8.5	-3.7	-2.3	-1.4

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

Long-term measurement (since COVID) of Improvement in Conditions – 6-month trend



Short-term measurement (last 30 days) of Improvement in Conditions – 6-month trend

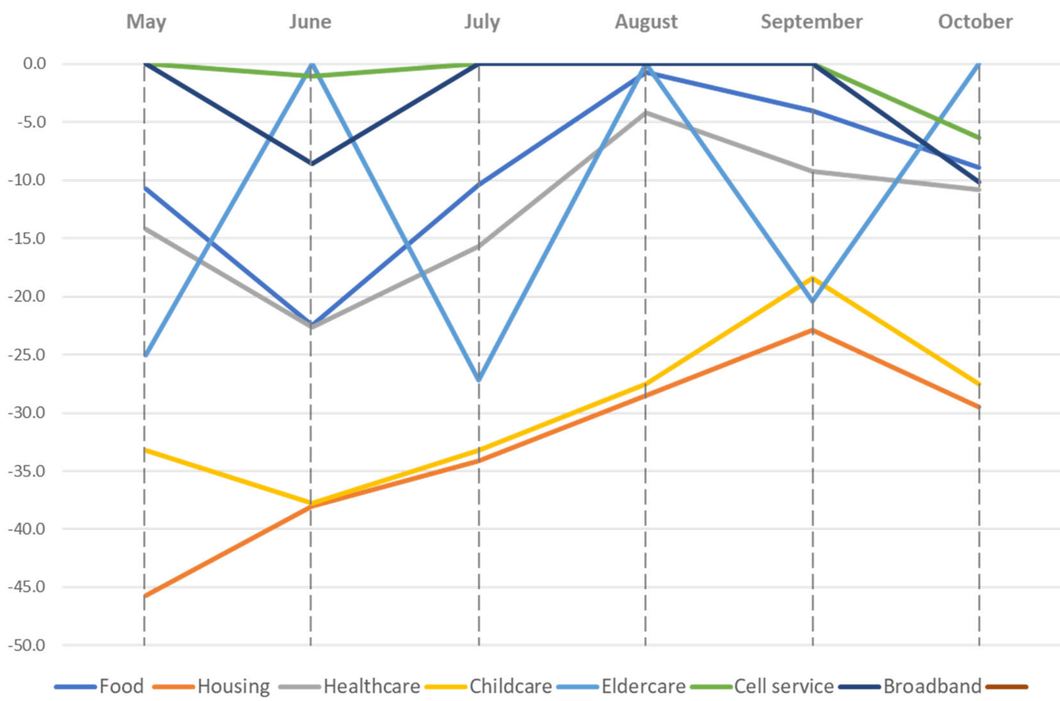


Comparing Net Improvement Scores by Specific Recovery Issues – May to October 2022

	May	June	July	August	September	October	6-mo change
Food	-10.7	-22.5	-10.4	-0.7	-4.0	-8.9	+16.8%
Housing	-45.7	-38.0	-34.1	-28.5	-22.9	-29.5	+35.4%
Healthcare	-14.2	-22.6	-15.7	-4.2	-9.2	-10.8	+23.9%
Childcare	-33.2	-37.8	-33.2	-27.5	-18.4	-27.5	+17.2%
Eldercare	-25.0	*	-27.2	*	-20.4	*	n/a
Cell service	*	-1.0	*	*	*	-6.3	n/a
Broadband	*	-8.6	*	*	*	-10.1	n/a
Transportation	*	*	*	-15.3	*	*	n/a

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

NIS Trends for Specific Recovery Areas (NIS Scores) – May to October 2022



Measures of Specific Recovery Issues

The six-month trends in specific recovery issues are mixed but mainly positive. While all measures of 30-day change for specific necessities remained in the net “declined” category in October, they have all become less negative since their initial observations except cell and broadband services. The two necessities with the most negative measures – housing and childcare – have improved significantly over the 6-month period, trending up by 26.3% on average.

Differences across Prosperity Zones in North Carolina

Only three of the eight Prosperity Zones in NC have reported downturns in access to necessities over the last six-months – the Western, Piedmont-Triad, and Sandhills regions. These six-month declines were in access to childcare in the Western and Piedmont-Triad regions and access to food in the Western, Piedmont-Triad, and Sandhills regions.

In contrast to prior months when four regions lagged state-wide averages on most issues, only the Western Prosperity Zone reported four out of six issues below NC means – in food, housing, childcare, and cell service. The light-red highlights indicate Prosperity Zones that are below the average rating of improvement/decline for the state (scale of 1 to 7). In terms of 6-month trends, only the Piedmont-Triad and North Central zones reported changes less positive than three out of four state-wide monthly measures.

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

	Food	Housing	Healthcare	Childcare	Cell	Broadband	Overall
Western	3.56	3.24	3.74	3.28	3.76	4.18	3.91
Northwest	3.68	2.91	3.77	3.38	3.90	3.81	4.15
Southwest	4.00	3.55	3.90	3.73	4.17	3.85	3.91
Piedmont-Triad	3.91	3.74	3.84	3.44	4.14	4.12	4.10
North Central	3.89	3.52	3.76	3.49	3.92	3.76	4.12
Sandhills	3.75	3.67	4.04	3.54	3.96	3.63	3.96
Northeast	3.96	3.40	3.73	3.68	3.56	3.35	3.89
Southeast	4.02	3.68	3.70	3.70	3.93	3.82	3.98
ALL NC	**3.88**	**3.46**	**3.82**	**3.54**	**3.89**	**3.83**	**4.02**

indicates ratings for the Prosperity Zone are significantly below state-wide averages at $p \leq 0.05$

6-month Percentage Change in Mean Ratings for Prosperity Zones (May to October 2022)

	Food	Housing	Healthcare	Childcare
Western	-10.0%	+18.5%	+36.8%	-0.4%
Northwest	+0.9%	+5.8%	+37.0%	+9.4%
Southwest	+10.7%	+12.1%	+23.2%	+12.0%
Piedmont-Triad	-6.6%	+16.2%	+19.1%	-5.3%
North Central	+1.7%	+12.9%	+20.8%	+2.7%
Sandhills	-3.2%	+16.0%	+27.8%	+13.0%
Northeast	+17.6%	+15.2%	+26.5%	+1.2%
Southeast	+0.4%	+14.4%	+14.9%	+11.6%
ALL NC	+0.8%	+14.2%	+26.0%	+5.7%

indicates 6-month change for the Prosperity Zone lagged state-wide change

Six-Month Trend - Are Conditions More Challenging for Families with Children and the Elderly? (May to October using Agreement scale 1 – 7 *where higher agreement is worse*)

	CONDITIONS FOR FAMILIES WITH CHILDREN			CONDITIONS FOR THE ELDERLY		
	May	**October**	**6-mo change**	**May**	**October**	**6-mo change**
Food	5.10	4.66	+8.6%	5.26	4.83	+8.2%
Housing	5.01	4.80	+4.2%	5.08	4.90	+3.5%
Healthcare	4.70	4.48	+4.7%	4.89	4.60	+5.9%
ALL ISSUES	**4.94**	**4.65**	**+5.9%**	**5.08**	**4.78**	**+5.9%**

indicates improvement for specific issue lagged all issues for families with children or the elderly

Community leaders still uniformly agree that families with children and the elderly have more challenges accessing necessities compared to all households in the state. The six-month trends in measures of challenges for families and the elderly show improvements though, with overall improvement of +5.9% for both groups. Access to food and housing remain more challenging issues compared to access to healthcare, although all ratings have become slightly less negative over time.

Conclusions

The overall picture of recovery in NC over the last six months is mixed, with all specific issues in October remaining in the net negative or "declined" range of the 30-day net improvement scale (NIS) which has a range of -100 to +100. The NIS results for specific issues in October range from -6.3 for cell service to -29.5 for housing. These negative ratings from community leaders are balanced by the six-month trends in results that show upticks in ratings for all four necessities tracked monthly – access to food, housing, healthcare, and childcare. The area with the most negative ratings – access to housing – posted the most significant six-month improvement in ratings (35.4% less negative).

It is important to remember that the majority of all responses about 30-day changes in conditions remained in the neutral range for October (4 on a 7-point scale). The neutral option was selected by 63.3% of panelists for all specific issues and 59.3% for the overall month-to-month measurement.

Only one of the eight Prosperity Zones in NC lagged state-wide averages in more than half of the six recovery areas studied in October. The Western region lagged state-wide measures of access to food, housing, childcare, and cell service. The Northwest and Northeast posted the most positive six-month trends in results, lagging state-wide averages on only one of four monthly measures, while the North Central and Piedmont-Triad posted less progress, with six-month changes lagging the state in three or more areas of recovery.

Finally, the overall measures of long-term and short-term recovery continued their trends from prior months. The long-term measure of improvement since the onset of COVID was very positive in October with an NIS of +82.0 on a net improvement scale of -100 to +100, while the short-term measure of improvement in the last 30-days remained just below neutral with an NIS of -1.4. The six-month trend for both overall measures is positive, with both scores showing steady improvements since July, including upticks of +9.0 NIS points for the long-term measure and +7.1 points for the short-term measure.

Appendix A

Panelists Compared to Population by Prosperity Zones

	Resp.	Pop.	Counties Represented
Western	12.1%	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	11.9%	23.1%	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	12.9%	16.5%	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	18.3%	24.4%	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	9.0%	8.1%	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	11.3%	4.9%	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	13.6%	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
Less than one year	7.7%
One to two years	13.5%
Three to five years	24.7%
Six to ten years	19.5%
More than ten years	34.5%
TOTAL	100.0%
More than five years	**54.1%**

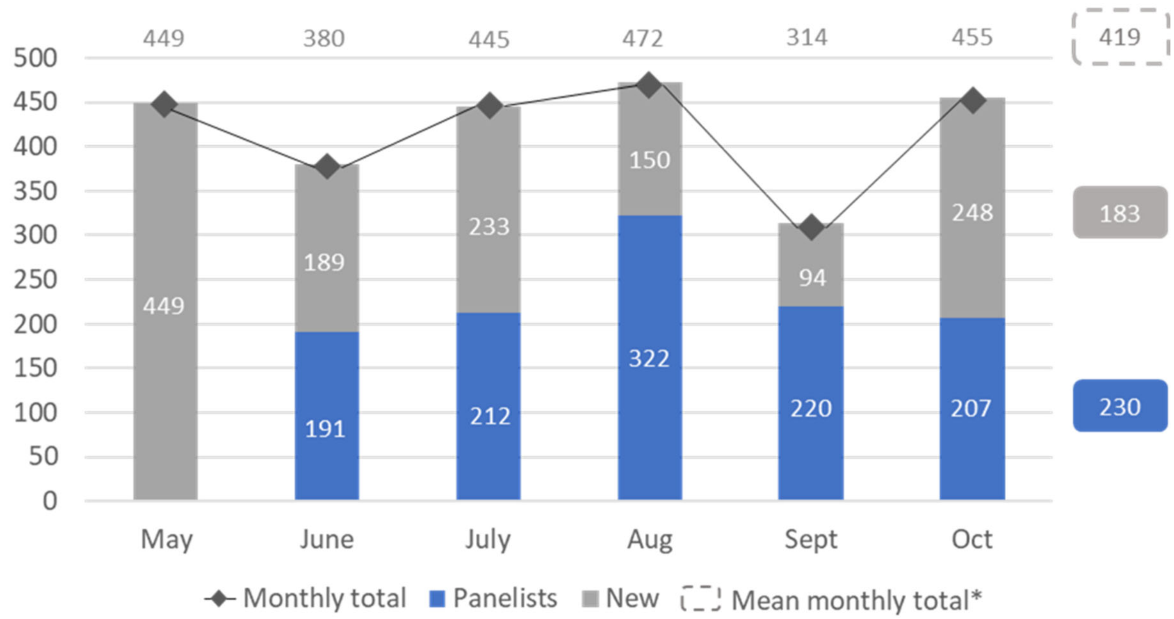
Areas of Community Leadership for all Panelists

	AREA OF LEADERSHIP	
1	Arts & culture	0.4%
2	Business & commerce	2.1%
3	County government	11.3%
4	Education – Childcare, Early	1.7%
5	Education - K-12	11.1%
6	Education - Postsecondary	2.5%
7	Faith-based organizations	2.4%
8	Food & nutrition	0.6%
9	Housing	0.2%
10	Labor & workforce	0.7%
11	Libraries	0.6%
12	Municipal government	63.0%
13	Public health	0.9%
14	Regional planning	1.3%
15	Social services	1.2%
16	Tribal organizations	0.3%
	TOTAL	100.0%
	ALL GOVERNMENT	74.3%
	ALL EDUCATION	15.8%

Specific Issues in Community Recovery – OCTOBER Rank Order of Importance

Access to:	Mean Rank	Implied Rank
Food	2.64	T1
Housing	2.83	T1
Childcare	3.28	3
Healthcare	3.82	4
Eldercare	4.92	T5
Technology	5.15	T5
Transportation	5.42	7

Trends in Sample Contribution – panelists versus new respondents



** Monthly means for panelist and new subsamples exclude May (initial month where ALL are new)*

Note: The contribution to monthly samples from panelists ranges from 70% to 45%. The 45% contribution from panelists in October is an exception due to one very large addition to the respondent invitation database from a new study partner. The mean response rate for panelists is 30.6%, ranging from monthly rates of 42.5% to 18.6%. The completion rate (proportion of respondents who complete the survey after opening it) remained strong and steady in October at 79.5%. In all, this reflects an average decline in monthly panel response rates of 6% per month since June or attrition (the loss) of about 46 panelists per month, on average. In our initial planning for the NC CES, we estimated attrition of 71 panelists per month during this period. The blended mean response rate for panelists and new respondents for the initial six-month period is 21.3%. Using this blended rate, our actual monthly sample sizes exceed our initial projections for May to October 2022 by about 30 responses per month. At the end of October, the panel database stands at n = 1,330 and our nonrespondent (new invitees) database at n = 3,707 for a total respondent invitation database of n = 5,037.

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.