



NC Community Engagement Survey for NOVEMBER 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 November we examined five specific issues related to community wellness, including access to food, healthcare, housing, childcare, and eldercare, 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 grew to 1,548 members in November with the following characteristics:

- 440 community leaders responded in November across 98 of North Carolina's 100 counties and all the state's eight Prosperity Zones.
- 53.3% of all panelists report more than five years in their current leadership roles, and 33.9% report ten or more years of tenure, with just 8.5% indicating less than one year in their roles.
- About 75% of panelists work in a municipal, county, or state government role and 14% work in local education. The balance of panelists are leaders in business, public health, faith-based, and social services organizations.

This report for November presents observations for seven months.

The November 2022 NC CES generated the following noteworthy insights:

- **LONG AND SHORT-TERM MEASURES OF COMMUNITY CONDITIONS REMAIN MIXED**
Community leaders were slightly more optimistic about the long-term changes in community conditions (since the onset of COVID), with an NIS of +82.6. But, the short-term measure of conditions (last 30 days) became more negative in November, slipping by 3.3 NIS points to -4.7.
- **AFFORDABILITY OF NECESSITIES IMPROVED BUT CONTINUE TO SHOW INFLATIONARY EFFECTS**
Affordability of necessities like food, housing, healthcare, and childcare have improved since May. But all measures of affordability remained in the negative or "declined" range in November and among the lowest of all short-term measures.
- **ONLY THE SOUTHWEST REGION LAGS BOTH STATE-WIDE NECESSITIES AND OVERALL MEASURES**
The Piedmont Triad, Northwest, and Southwest Prosperity Zones were the only areas lagging state-wide NIS levels for three or more necessities. But, the Southwest, Sandhills, and Western zones lagged the state average in the overall short-term NIS, with NIS of -22.2, -16.0, and -11.5,



respectively. The Southeast and Piedmont-Triad were the only zones with positive short-term overall NIS in November at +6.7 and +5.1, respectively.

- **MEASURES FOR ALL BUT ONE NECESSITY TRENDED UPWARD SINCE MAY BUT REMAIN NEGATIVE**
NIS measures of access to food, healthcare, and eldercare all became somewhat more negative in November compared to the prior measurement, with eldercare posting the steepest decline of 8.3 NIS points since September. All NIS measures for necessities stayed in the “declined range” in November. All necessities except eldercare have posted healthy improvements since May.
- **THE ELDERLY AND FAMILIES WITH CHILDREN STILL FACE GREATER CHALLENGES**
On average, in November about 58% of community leaders agreed that families with children and the elderly face greater challenges in access to necessities like food, housing, and healthcare compared with all NC households. The somewhat encouraging news is that these measures of challenges for families and the elderly have improved by about 9% since May.

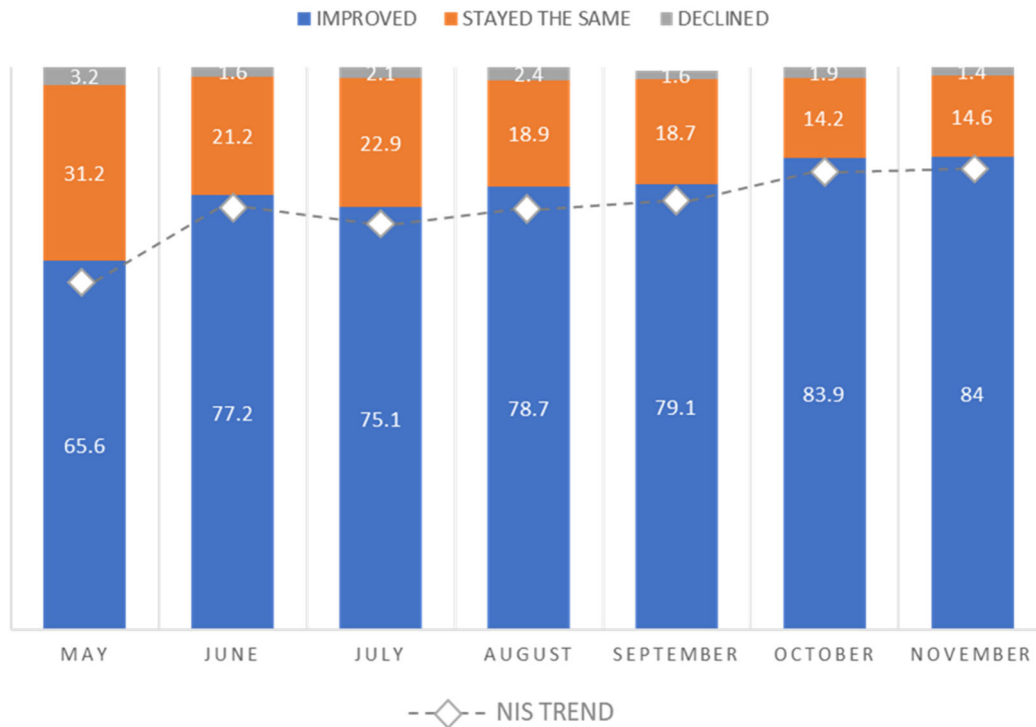
The long-term measure of overall change (since onset of COVID) improved marginally in November, with a Net Improvement Score (NIS) of +82.6, up less than a full point from October. Nevertheless, long-term NIS is more than 20 points better than in May. The short-term measure of overall change in community conditions became more negative in November, however, sliding more than 3 points to -4.7. The November short-term NIS is still a large improvement from the value in June, improving by 15 points from -19.7. It is important to note that more than half of respondents gave a rating of “stayed the same” this month, like the trend in neutral ratings since May. Interestingly, the long-term NIS measure has received decreasing numbers of neutral ratings since May – from 31.2% to 14.6%, while the neutral ratings (stayed the same) for the short-term measures have remained in a narrower range between 49.5% in June and 59.3% in October. The percentage of “declined” responses for the long-term NIS measure has never risen above the 3.2% mark in May, whereas “declined” responses have accounted for between 35.1% in June and 10.9% in May.

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

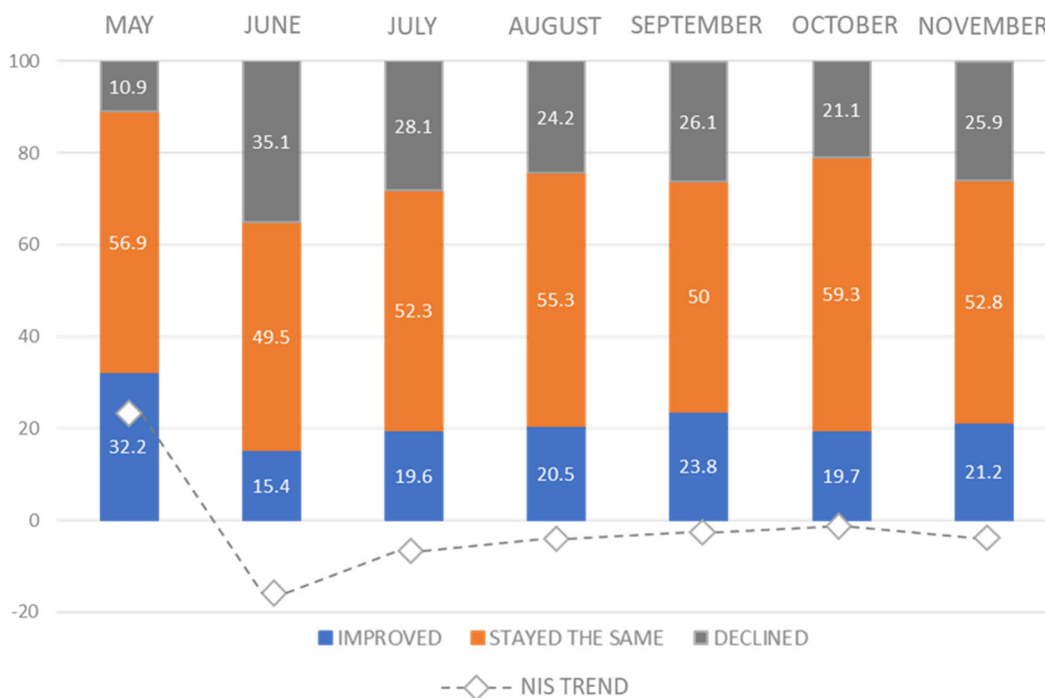
SINCE COVID	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
IMPROVED	65.6%	77.2%	75.1%	78.7%	79.1%	83.9%	84.0%
STAYED THE SAME	31.2%	21.2%	22.9%	18.9%	18.7%	14.2%	14.6%
DECLINED	3.2%	1.6%	2.1%	2.4%	1.6%	1.9%	1.4%
NIS*	+62.4	+75.6	+73.0	+76.3	+78.1	+82.0	+82.6
LAST 30 DAYS	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
IMPROVED	32.2%	15.4%	19.6%	20.5%	23.8%	19.7%	21.2%
STAYED THE SAME	56.9%	49.5%	52.3%	55.3%	50.0%	59.3%	52.8%
DECLINED	10.9%	35.1%	28.1%	24.2%	26.1%	21.1%	25.9%
NIS*	21.3	-19.7	-8.5	-3.7	-2.3	-1.4	-4.7

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

Long-term NIS Trend (since COVID) – 7 months from May to November 2022



Short-term NIS Trend (last 30 days) – 7-months from May to November 2022



Comparing Net Improvement Scores (NIS) by Access to Necessities – May to November 2022

	May	June	July	August	September	October	November	7-mo. change
Food	-10.7	-22.5	-10.4	-0.7	-4.0	-8.9	-10.1	+0.6
Housing	-45.7	-38.0	-34.1	-28.5	-22.9	-29.5	-28.8	+16.9
Healthcare	-14.2	-22.6	-15.7	-4.2	-9.2	-10.8	-12.4	+1.8
Childcare	-33.2	-37.8	-33.2	-27.5	-18.4	-27.5	-26.7	+6.7
Eldercare	-25.0	*	-27.2	*	-20.4	*	-28.7	-3.7
Cell service	*	-1.0	*	*	*	-6.3	*	n/a
Broadband	*	-8.6	*	*	*	-10.1	*	n/a
Transport	*	*	*	-15.3	*	*	*	n/a

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

Measures of Access to Specific Necessities

All necessities with monthly or bimonthly NIS values have improved since May except access to eldercare, which has worsened marginally. Housing access has made the largest gains since May with an uptick of almost seventeen NIS points. But housing remained the most negatively rated necessity in November with a -28.8 NIS, just slightly more negative than eldercare at -28.7. All measures of 30-day change for necessities remained in the net “declined” range in November.

Measures for affordability of necessities continue to be a concern, reflecting ongoing inflationary conditions. While NIS measures of affordability are far less negative compared to May when the NC CES began, November NIS values are all firmly in the “declined” range with food affordability the most discouraging at a very low -60.1 NIS. On average, affordability measures have improved by 14.4 NIS points since May. Housing affordability has made the largest gains with an increase of 26 NIS points since May.

NIS for Affordability of Necessities – with May to November 2022 NIS-point Change

	November NIS	7-mo. change
Food affordability	-60.1	+12.8
Housing affordability	-47.9	+26.0
Healthcare affordability	-22.4	+9.5
Childcare affordability	-40.6	+14.5
Eldercare affordability	-38.9	+7.9
All affordability (mean)	-42.0	+14.4

Differences across Prosperity Zones in North Carolina

Three of the eight Prosperity Zones in North Carolina – Piedmont Triad, Northwest, and Southwest – trailed the state-wide NIS levels for three of the five necessities measured. However, only one zone – the Southwest – lagged state-wide averages in three necessities AND the overall monthly NIS with a short-term overall NIS of -22.2. The Sandhills and Western zones also lagged the state-wide average for short-term overall NIS, with NIS of

-16.0, and -11.5, respectively. The Southeast and Piedmont-Triad were the only zones with positive short-term NIS in November at +6.7 and +5.1, respectively. No Prosperity Zone posted a positive NIS for any specific necessities, with NIS values for necessities in zones ranging from 0.0 NIS for Western zone food access to -45.2 NIS for Southwest housing access.

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

	Food	Housing	Healthcare	Childcare	Eldercare	Overall
Western	0.0	-35.7	-3.7	-16.0	-19.2	-11.5
Northwest	-5.6	-37.1	-11.4	-37.1	-38.2	-3.2
Southwest	-25.8	-45.2	-16.7	-13.3	-21.4	-22.2
Piedmont-Triad	-14.0	-33.3	-7.3	-33.3	-34.3	+5.1
North Central	-5.6	-10.1	-11.8	-28.4	-22.2	-4.9
Sandhills	-3.7	-19.2	-23.1	-34.6	-34.6	-16.0
Northeast	-14.3	-30.6	-27.7	-27.7	-27.3	-5.3
Southeast	-8.1	-28.6	-8.8	-34.3	-40.0	+6.7
ALL NC	-10.1	-28.8	-12.4	-26.7	-28.7	-4.7

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 (May to November percentage-point change)

	Food	Housing	Healthcare
Families with children	58.3%	53.2%	43.1%
Elderly households	62.8%	57.9%	47.7%
Families 7-mo. Change*	+7.7%	+8.3%	+12.0%
Elderly 7-mo. Change*	+7.5%	+5.1%	+14.8%

** 7-month changes in conditions for families with children and the elderly are the percentage points LESS negative*

A majority of community leaders still agree that families with children and the elderly have more challenges accessing food and housing compared to all households in the state. Healthcare conditions for these households are rated somewhat better, with slightly less than half of respondents agreeing. The monthly trends since May in measures of challenges for families and the elderly show improvements though, with average improvements of +5.9 percentage points for both groups and much larger improvements for access to healthcare.

Conclusions

The November report for the NC Community Engagement Survey tells a similar story to past months with a few important departures. The long-term NIS measure of community wellness remains very positive, but with only a minute positive change from +82.0 in October to +82.6 in November, continuing a modest upward trend since July. The short-term NIS measures of changes in community conditions – both for specific necessities and overall – all remained in the “declined” range, with the short-term overall NIS posting the first decline since June. This slip in the 30-day NIS in November was small – only 3.3 NIS points – but it marks a change in the monthly trend.



On the bright side, all NIS measures of access to necessities except eldercare and all measures of conditions for families with children and the elderly have shown upticks in the seven months since the inception of the study. This positive note does not change the fact that all these short-term measures of access to necessities and overall conditions stayed in the “declined” or negative range of the NIS scale of -100 to +100. When short-term measures are viewed together, about 59% of all responses remain in the “stayed the same” or neutral category, making this response (4 on a 7-point scale) the most common overall.

Three of the eight Prosperity Zones in NC lagged state-wide averages in access to three or more of the five necessities studied in November, and three zones lagged the state-wide average for overall change – but only one region – the Southwest – was in both groups. The Northwest, Southwest, and Piedmont-Triad zones all lagged state-wide averages for access to three or more necessities, while the Western, Southwest, and Sandhills regions lagged the state-wide measure of overall short-term NIS. Two regional findings were particularly concerning, with NIS values of -40 or less – with the Southwest at -45.2 NIS for access to housing and the Southeast at -40.0 NIS for access to eldercare.

In all, the results in November support a “good news and bad news” story about community conditions in NC, with long-term optimism and modestly upward trends tempered by short-term challenges in access to basics like housing, childcare, and eldercare. While the measures of affordability of necessities have improved since May, the absolute NIS values for affordability in November remain the most negative of all short-term measures, with affordability of food at -60.1 NIS and affordability of housing and childcare both below -40.0 NIS. These findings are reinforced by the measures of conditions for families with children and the elderly, where most community leaders still agree conditions for these households are more challenging compared to all households in NC – particularly food access for the elderly (62.8% agree). Since community leaders consistently rank food and housing access as the most important community issues, the consistently negative values for these areas of community wellness remain particularly concerning.



Appendix A

Panelists Compared to Population by Prosperity Zones

	Number of Panelists	Percent of all	Percent of pop.	Counties Represented
Western	186	12.0%	7.0%	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, Polk, Rutherford, Swain, Transylvania
Northwest	173	11.2%	5.9%	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest	175	11.3%	23.1%	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	200	12.9%	16.5%	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	288	18.6%	24.4%	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	136	8.8%	8.1%	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	184	11.9%	4.9%	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	206	13.3%	10.1%	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne
ALL	1,548	100.0%	100.0%	

Time in Leadership Position for all Panelists

TENURE	Number of Panelists	Percent of all
Less than one year	132	8.5%
One to two years	209	13.5%
Three to five years	382	24.7%
Six to ten years	300	19.4%
More than ten years	525	33.9%
TOTAL	1,548	100.0%
More than five years	825	53.3%

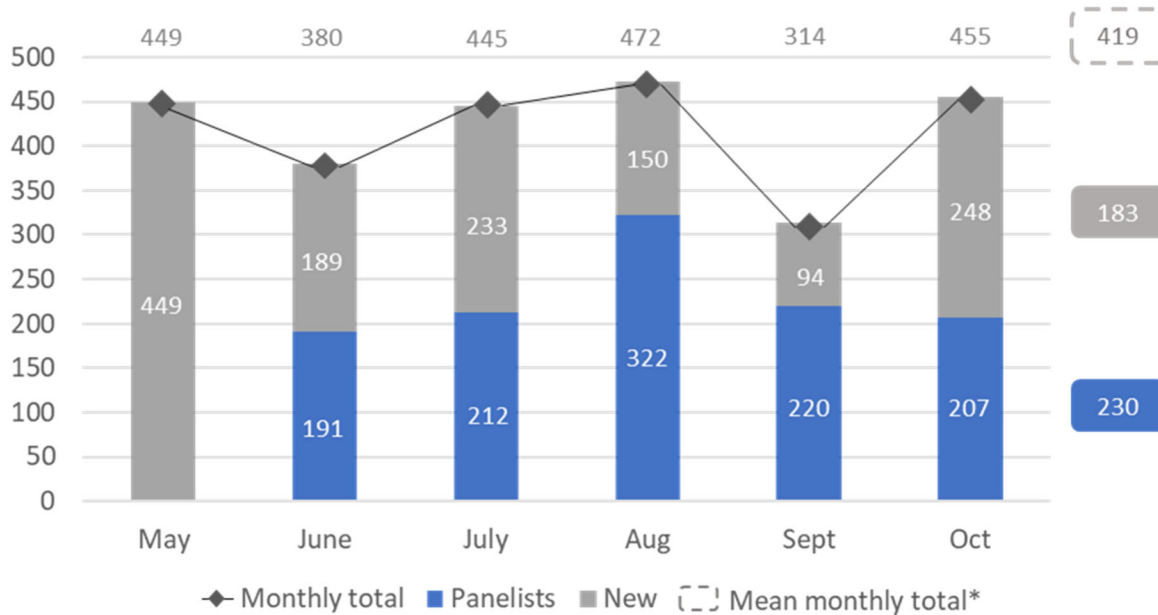
Areas of Community Leadership for all Panelists

	Role in the Community	Number	Percent
1	Arts & culture	4	0.3%
2	Business & commerce	42	2.7%
3	County government	206	13.3%
4	Education – Childcare, Early	23	1.5%
5	Education - K-12	150	9.7%
6	Education - Postsecondary	34	2.2%
7	Faith-based organizations	33	2.1%
8	Food & nutrition	8	0.5%
9	Housing	3	0.2%
10	Labor & workforce	14	0.9%
11	Libraries	8	0.5%
12	Municipal government	960	62.0%
13	Public health	12	0.8%
14	Regional planning	25	1.6%
15	Social services	22	1.4%
16	Tribal organizations	4	0.3%
	TOTAL	1,548	100.0%
	ALL GOVERNMENT	1,166	75.3%
	ALL EDUCATION	215	13.9%

Specific Issues in Community Conditions – NOVEMBER Rank Order of Importance

<i>Access to:</i>	Mean Rank	Implied Rank
Food	2.65	T1
Housing	2.67	T1
Childcare	3.34	3
Healthcare	3.71	4
Eldercare	4.82	5
Technology	5.31	T6
Transportation	5.50	T6

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 November 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 November 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 November 2022 by about 30 responses per month. At the end of November, 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](#).