

NC Community Engagement Survey for May 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 May survey questions covered five specific issues related to pandemic recovery, including food access, healthcare availability, housing access, eldercare availability, and childcare access as well as long-term and short-term measures of overall recovery in NC communities.

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

- 446 total responses recorded across 95 of North Carolina's 100 counties.
- All eight of the state's Prosperity Zones were significantly represented in the data.
- 55% of respondents reported having more than five years of tenure in their current leadership role and 35% reported having ten or more years of tenure.
- More than half of 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 working with local communities in the state.

Taken together, the May survey wave provided excellent coverage of the state (data was recorded for 95% of all counties) and the data was generated from an experienced group of community leaders with a diverse representation of economic backgrounds and geographical locations.

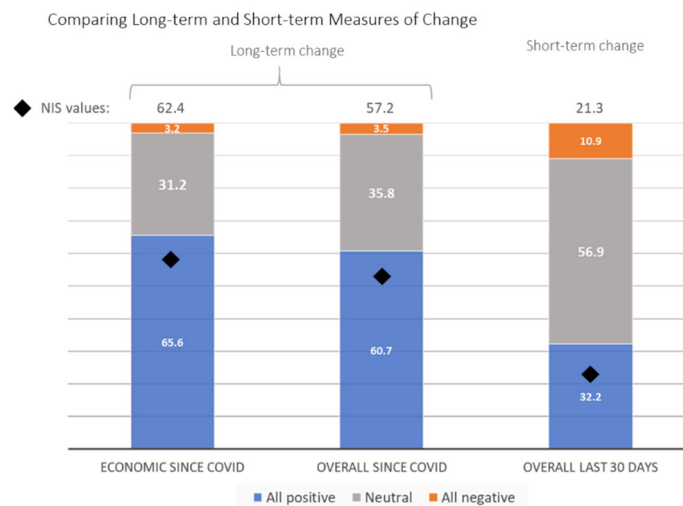
The resulting data set provides initial insights needed to help guide current pandemic recovery efforts across North Carolina. In addition, the survey results for May provide an important baseline which will allow researchers to track future changes in pandemic recovery conditions moving forward.

Continuing to gather survey data and glean meaningful insights from participants is critical to developing a trend line to track pandemic recovery progress over time and develop projections for areas of future need.

The May 2022 NC CES generated the following noteworthy insights:

- **PANDEMIC RECOVERY HAS STALLED**
Community leaders across North Carolina see stronger long-term improvement in conditions in their community, but progress in pandemic recovery has stalled according to measures of short-term change.
- **INFLATIONARY ECONOMIC CONDITIONS PERSISTS**
When asked about affordability of necessities, like food, healthcare, and housing, community leaders gave their lowest scores of recovery conditions, reflecting the inflationary economic conditions.
- **PANDEMIC RECOVERY HAS BEEN UNEVEN**
Pandemic recovery has not been even in regions across NC. Three (of the eight) Prosperity Zones in the state have lower ratings than the state-wide mean in four or more areas of recovery – the Northwest, Sandhills, and Northeast zones.
- **KEY AREAS OF PANDEMIC RECOVERY ARE LAGGING**
While the overall rating of 30-day change is positive, all five measures of specific recovery areas – food, housing, healthcare, childcare, and eldercare - are negative, especially housing and childcare with -46 and -33 net improvement scores (NIS), respectively¹.
- **ELDERLY AND FAMILIES WITH CHILDREN ARE IN GREATEST NEED**
Community leaders also indicated that the individual recovery areas were even more challenging for families with children and the elderly.

When comparing the long-term measures of change (since onset of COVID) and short-term measures (last 30 days), we see that the long-term measures are significantly more optimistic.

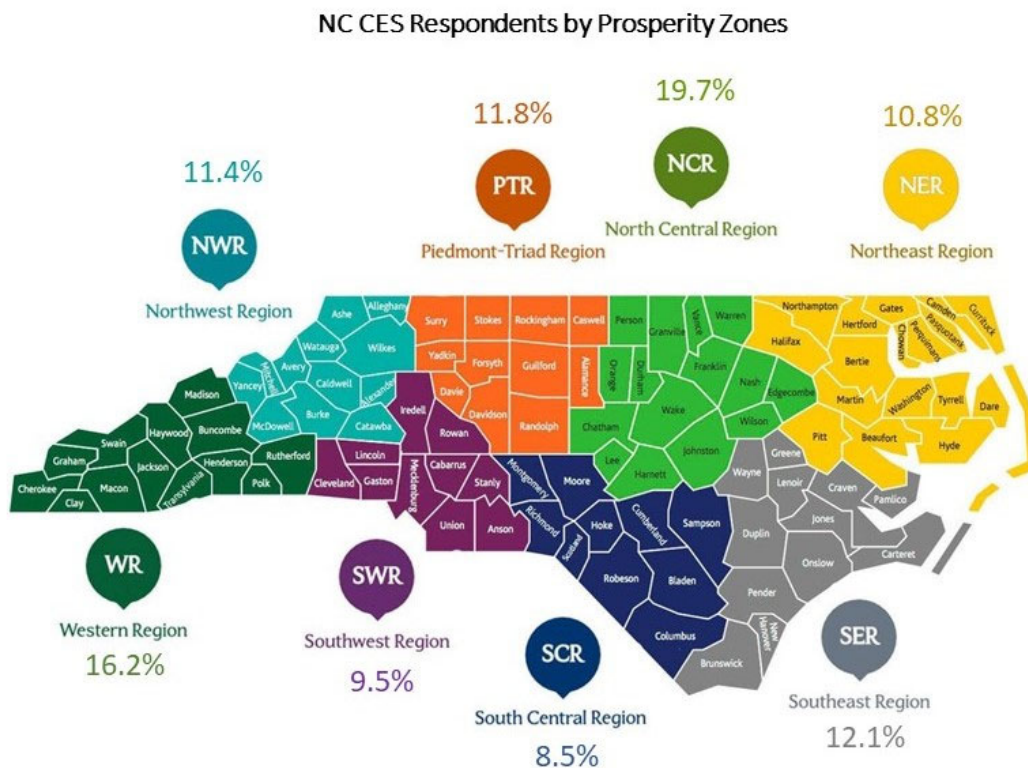


¹ Net Improvement Score (NIS) is the percent of positive responses minus the percent of negatives.

Prosperity Zones by the Numbers

Next, we examined the number of respondents and short-term data measures by North Carolina's eight Prosperity Zones. The North Central Region provided the highest number of participants, while the Western Region came in second.

The other six regions provided respectable respondent numbers ranging from 8.5% (South Central Region) of total respondents to 12.1% (Southeast Region). See below for a visual representation of respondents by Prosperity Zone.



Note that sample representation of Prosperity Zones aligns with the number of counties in each zone. A comprehensive list of counties represented Prosperity Zones is in Appendix A on page 5.

A deeper dive into the data shows that pandemic recovery conditions are not the same in all areas of the state. In the table below, the mean rating values for the five pandemic recovery issues are highlighted when that Prosperity Zone is below the average for the state.

This analysis provides insight into which areas are lagging the rest of the state and are at risk of falling further behind.

The data indicates three Prosperity Zones have four or more pandemic recovery measures that are below the state-wide average – Northwest, Sandhills (South Central), and Northeast.

Month-to-Month Composite Change Measures* of Issues by Prosperity Zones

Prosperity Zones	Overall	Food	Housing	Healthcare	Childcare	Eldercare
Western	4.38	3.18	2.42	4.02	3.12	3.48
Northwest	3.97	3.13	2.57	4.08	3.00	3.10
Southwest	4.40	3.29	3.00	4.51	3.20	3.50
Piedmont-Triad	4.27	3.47	2.94	4.37	3.45	3.57
North Central	4.38	3.17	2.70	4.19	3.12	3.26
South Central	4.52	2.98	2.69	3.78	2.90	3.14
Northeast	4.18	2.76	2.74	3.83	3.47	3.41
Southeast	4.39	3.49	2.95	4.12	3.11	3.54
ALL NORTH CAROLINA	4.35	3.18	2.75	4.11	3.17	3.38

* Measures are composites for three items per issue | Highlighted Boxes = Below statewide mean

Conclusions

In summary, measurements in short term changes to pandemic recovery conditions in communities throughout NC are largely neutral or “stayed the same” (4 on 1 – 7 scale) over the last 30 days, indicating pandemic has stalled to some extent.

Long-term measures of change in pandemic recovery conditions (since COVID) are modestly more optimistic and average ratings slightly higher than neutral. All three “overall” measures of conditions have positive NIS measures, whereas the short-term measures of specific issues, like housing, food, and healthcare, all have negative NIS values.

Regarding the survey instrument, internal analysis of the data collection process indicated a need for shortening the survey and recalibrating the topics and question groups. Next, we highlight improvements that have been made to the survey for June.

What to Expect from the June NC CES Survey

We made modest changes to the survey for June. The Eldercare question groups will rotate out in June to allow the researchers to gather data related to the access and affordability of Technology. Establishing a baseline of need in this area is important as it relates to equitable access to online education and instruction for children, as one example. The Eldercare question groups will rotate back in for future waves.

The Childcare section has become a core measure based on its priority ratings in the May survey wave.

Some responses to questions are so highly correlated that keeping both questions adds little in terms of new information. In other words, the questions are interpreted as redundant by respondents. When two or more questions are identified as having high correlations, this is an opportunity to remove some of the questions and shorten the survey. Shortening the survey improves completion rates and the quality of the data set. In the May survey, multiple questions had either high or very high correlations with other questions. As a result, we removed or combined some questions for June. A table detailing the reasons for changes and actions taken is provided in Appendix B on page 6.

Appendix A

Counties Represented by the Eight Prosperity Zones

Prosperity Zone	Counties represented
Western Region	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, Polk, Rutherford, Swain, Transylvania
Northwest Region	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest Region	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad (Central) Region	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central Region	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills (South Central) Region	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast Region	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast Region	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne

Appendix B

Questions Removed from May Survey Instrument

Variables	Finding	Action Taken
Economic change since COVID OVERALL change since COVID	Highly correlated (.811)	Cut "Economic since COVID"
Food Access (30-days) with Food Variety	Strong correlation (.602)	Cut "Food Variety"
Healthcare Phone with Healthcare Video	Strong correlation (.681)	"Video" combined with "Phone" as "Remote Access"
Housing Access with Housing Affordability and Housing Variety	Strong correlations (.690 & .619 respectively)	Cut "Housing Variety"
Eldercare Access with Eldercare Affordability and Eldercare Variety	Strong correlations (.705 & .697 respectively)	Cut "Eldercare Variety"
Childcare Access with Housing Affordability and Housing Variety	Strong correlations (.684 & .678 respectively)	Cut "Childcare Variety"
All five Factor questions about Business Closures and Evictions and Foreclosures question	All have >70% "missing" or "not at all" values	Cut all "Business Closure" and "Eviction" questions

Appendix C

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](#).