

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

July survey participants are community leaders from across the state with the following characteristics:

- 440 community leaders responded in July 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 35% report ten or more years of tenure.
- More than 72% of all respondents work in a municipal or county government role and 18% work in local education. The balance of respondents are leaders in business, public health, faith-based, and social services organizations.

The July survey provided excellent coverage of communities across the state. Data was recorded for 97 of 100 counties and for all 8 Prosperity Zones. July respondents were more likely to report state, county, and municipal government roles compared to May and June.

The monthly survey data tracks the state of pandemic recovery efforts at the community level across all of North Carolina. This report for July is the first opportunity to present trends across at least three time periods for each question. Consequently, we will emphasize the three-month trends in the data since May when the North Carolina Community Engagement Survey began.

The July 2022 NC CES generated the following noteworthy insights:

- **LONG-TERM MEASURE OF PROGRESS IS LEVEL WHILE SHORT-TERM IMPROVES SLIGHTLY**
Community leaders across North Carolina are still more optimistic about long-term recovery since the onset of COVID compared to their view of short-term progress. But short-term measures improved modestly in July. The long-term measure remained essentially the same as June.
- **AFFORDABILITY OF NECESSITIES IMPROVED BUT REMAIN A CONCERN**
July respondents rated the affordability of necessities – like food, healthcare, childcare, and housing – in the negative range as in prior months, but affordability ratings have improved slightly for food and housing compared to June.
- **PANDEMIC RECOVERY CONTINUES TO VARY SIGNIFICANTLY ACROSS REGIONS**
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 July – the Western, Northwest, and Northeast zones. The Northwest and Northeast zones have lagged state-wide averages for May, June, and July. It is also notable that results for the Western and North Central PZs declined most in overall recovery from May to July (22.3% and 16.7% declines respectively).
- **KEY AREAS OF SHORT-TERM PANDEMIC RECOVERY IMPROVED MARGINALLY IN JULY**
Four measures of specific recovery areas – food, healthcare, housing, and childcare – improved slightly in July. Eldercare remained essentially unchanged since the measurement in May. 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 -34.1 and -33.2 respectively).
- **SOME IMPROVEMENT FOR THE ELDERLY AND FAMILIES WITH CHILDREN**
In July, most community leaders still report that all five recovery areas are a greater challenge for families with children and for the elderly. However, ratings of conditions for families with children and the elderly improved slightly compared to June.

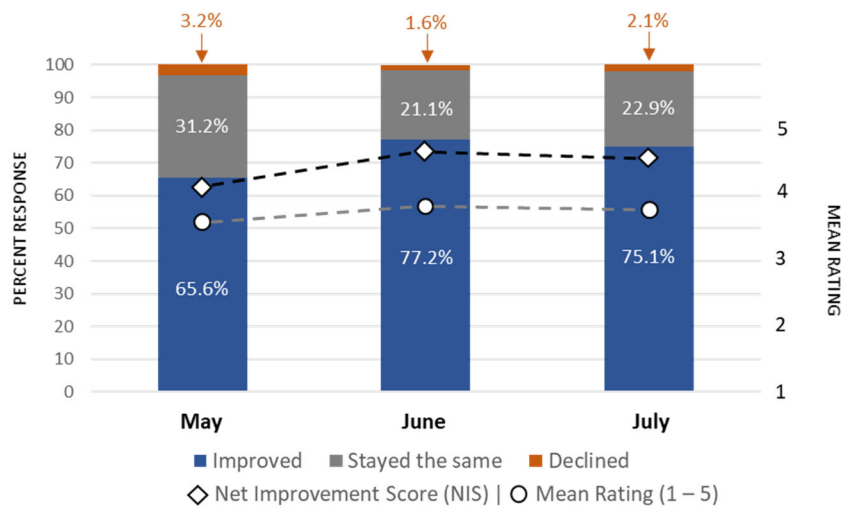
The long-term measure of overall change (since onset of COVID) remain more optimistic compared to the short-term measure in July with a positive Net Improvement Score (NIS) of 73 compared to the short-term overall NIS of -8.5. While the long-term measure of recovery has remained relatively steady and positive, the short-term measure (last 30-days) saw a steep decline from May to June and a rebound in July. It is important to note that more than 52% of responses about overall short-term recovery indicated “stayed the same” (4 on 1 – 7 scale) in July. For the five specific issues of recovery (food, healthcare, housing, eldercare, and childcare), the percentage of respondents who indicated “stayed the same” ranged from 53% to 63%.

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

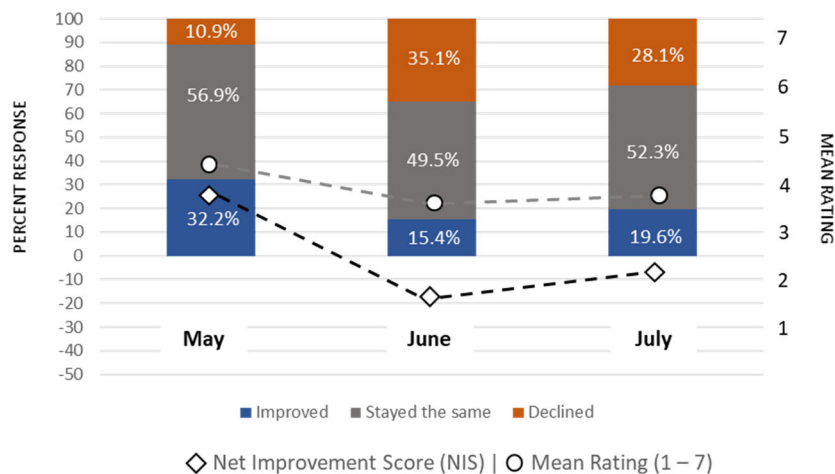
	Long-Term (since COVID)			Short-Term (last 30 days)		
	May	June	July	May	June	July
NIS*	62.4	75.6	73.0	21.3	-19.7	-8.5
Improved	65.6	77.2	75.1	32.2	15.4	19.6
Stayed the same	31.2	21.1	22.9	56.9	49.5	52.3
Declined	3.2	1.6	2.1	10.9	35.1	28.1

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

Long-Term Change in Overall COVID Recovery (since COVID)



Short-Term Change in Overall COVID Recovery (last 30 days)

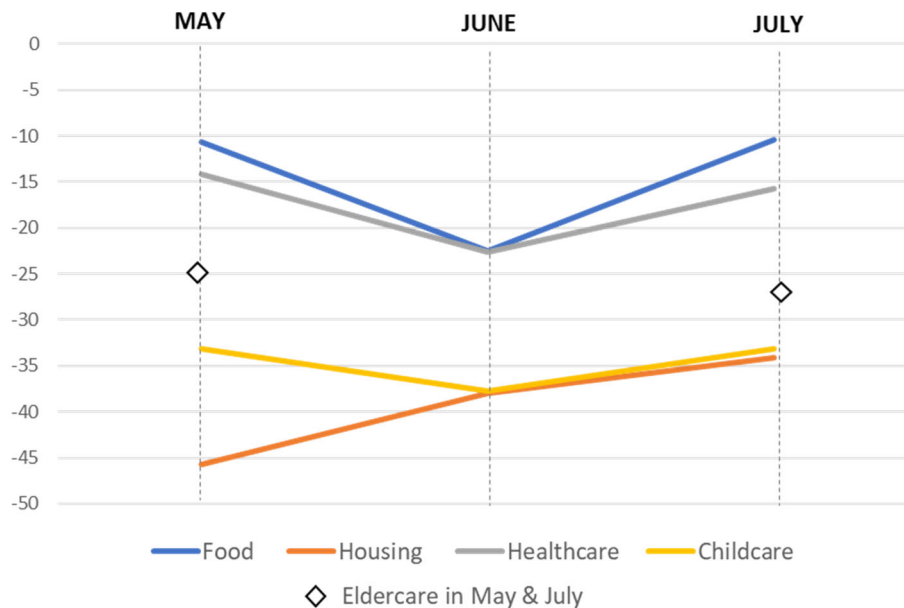


Comparing Results by Specific Recovery Issues – May to July 2022

Recovery Issues	May NIS	June NIS	July NIS	June to July change
Food	-10.7	-22.5	-10.4	+12.1
Housing	-45.7	-38.0	-34.1	+3.9
Healthcare	-14.2	-22.6	-15.7	+6.9
Childcare	-33.2	-37.8	-33.2	+4.6
Eldercare	-25.0	n/a	-27.2	-2.2*

* May to July change

NIS for Specific Recovery Areas – May to July 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. Three Prosperity Zones have four or more pandemic recovery measures below the state-wide average – Western, Northwest, and Northeast. The Northwest and Northeast Prosperity Zones both have mean rating in four or more areas of COVID recovery in May, June, and July.

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

	Food	Housing	Healthcare	Childcare	Eldercare	Overall
Western	3.75	2.92	3.68	3.20	3.68	3.58
Northwest	3.74	3.24	3.58	3.29	3.21	3.97
Southwest	4.15	3.54	3.87	3.51	3.58	4.11
Piedmont-Triad	3.76	3.54	3.72	3.54	3.66	3.83
North Central	3.95	3.26	3.91	3.40	3.72	3.75
Sandhills	3.51	3.39	4.03	3.42	3.53	4.00
Northeast	3.47	3.12	3.21	3.23	3.54	3.65
Southeast	3.88	3.65	3.81	3.55	3.73	3.98
ALL NC	3.80	3.33	3.74	3.40	3.60	3.85

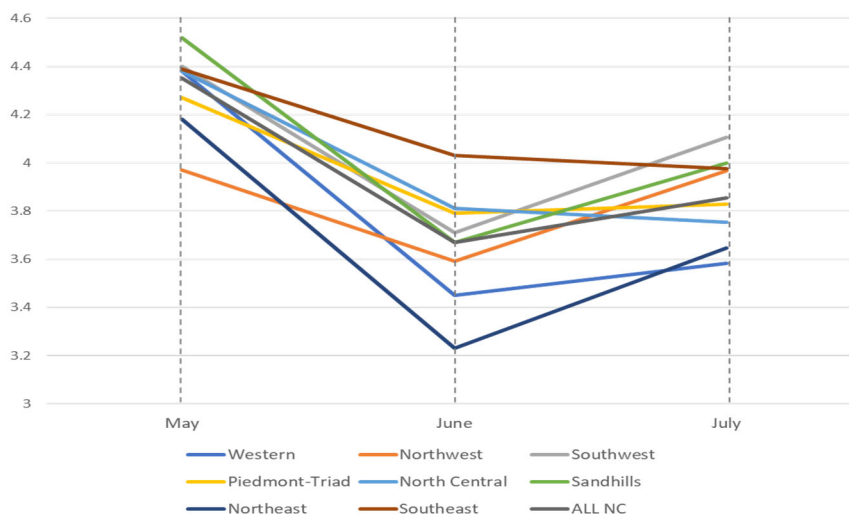
indicates ratings for the Prosperity Zone are below state-wide averages

Trend in Mean Ratings for Prosperity Zones (May to July 2022 change as percent of July rating)

	Food	Housing	Healthcare	Childcare	Eldercare	Overall
Western	+15.1%	+17.2%	-9.2%	+2.6%	+5.4%	-22.3%
Northwest	+16.4	+20.6	-14.1	+8.9	+3.5	-0.1
Southwest	+20.7	+15.2	-16.7	+8.8	+2.2	-7.2
Piedmont-Triad	+7.8	+16.9	-17.4	+2.6	+2.4	-11.5
North Central	+19.8	+17.2	-7.3	+8.3	+12.4	-16.7
Sandhills	+15.2	+20.8	+6.2	+15.3	+11.0	-13.0
Northeast	+20.3	+12.2	-19.5	-7.5	+3.6	-14.6
Southeast	+10.1	+19.3	-8.1	+12.5	+5.2	-10.4
ALL NC	+16.4%	+17.5%	-9.8%	+6.7%	+6.2%	-12.9%

indicates three-month changes for the Prosperity Zone are less positive (or more negative) compared to all of NC

Trends in Overall Month-to-Month (short-term) Ratings of COVID Recovery by Prosperity Zones



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

	For families w/children	For the elderly
Food	4.79	5.01
Housing	4.85	4.95
Healthcare	4.71	4.78
ALL ISSUES	4.78	4.91

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 still more challenging with agreement ratings ranging from 4.71 to 5.01 on a seven-point agreement scale. But these ratings of conditions for families and the elderly improved slightly compared to June.

Conclusions

In summary, measurements of short-term changes in pandemic recovery conditions remain mostly neutral or “stayed the same” (4 on 1 – 7 scale) in July, indicating pandemic recovery is not progressing according to most community leaders. Nevertheless, short-term ratings of pandemic recovery improved slightly for four of the five specific recovery areas – food, housing, healthcare, and childcare. Eldercare remained essentially unchanged.

The long-term measure of change in pandemic recovery conditions (since onset of COVID) continues to be more optimistic compared to short-term measures (last 30 days), but the long-term measure has declined slightly since June. The overall short-term measure of pandemic recovery improved slightly, mirroring the specific areas of recovery in July.

Overall, the three-month period, from May to July, has shown most measures rebounded in July to be very close to the May levels after a dip in June. Housing is the exception, receiving recovery ratings that have risen steadily since May, from NIS of -45.7 to -34.1. Yet, housing remains the most negatively rated area of recovery.

Pandemic recovery continues to vary widely across North Carolina’s eight Prosperity Zones. In July, 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 May, June, and July.

Appendix A

Responses compared to Population by Prosperity Zones for July Sample

	Resp.	Pop.	Counties Represented
Western	12.7%	7.0%	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson , Macon , Madison, Polk, Rutherford, Swain, Transylvania
Northwest	9.3	5.9	Alexander, Alleghany, Ashe, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest	14.3	23.1	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad	10.9	16.5	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central	17.7	24.4	Chatham, Durham, Edgecombe, Franklin, Granville, Harnett, Johnston, Lee, Nash, Orange, Person, Vance, Wake, Warren, Wilson
Sandhills	10.0	8.1	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast	10.9	4.9	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Gates, Halifax, Hertford, Hyde, Martin, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington
Southeast	14.1	10.1	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne
ALL	100.0%	100.0%	

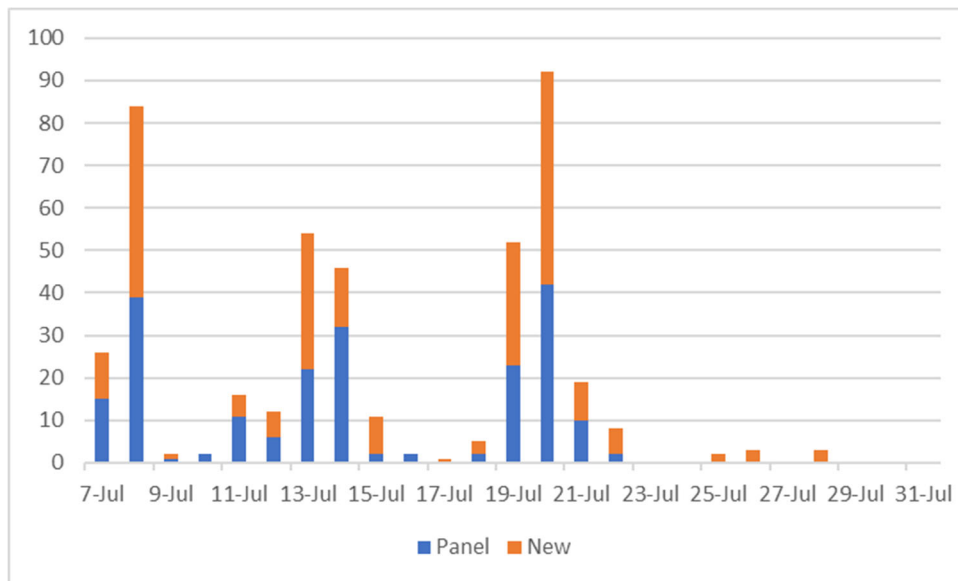
Time in Leadership Position for all Respondents to Date (May, June, and July)

TENURE	Percent
Less than one year	6.8%
One to two years	13.0
Three to five years	24.9
Six to ten years	20.4
More than ten years	34.9
TOTAL	100.0%
More than five years	55.3%

Areas of Community Leadership for all Respondents to Date (May, June, and July)

AREA OF LEADERSHIP	Percent
Arts & culture	0.5%
Business & commerce	2.4%
County government	8.2%
Education – Childcare, Early	1.9%
Education - K-12	12.7%
Education - Postsecondary	3.0%
Faith-based organizations	1.7%
Food & nutrition	0.6%
Housing	0.3%
Labor & workforce	0.5%
Libraries	0.8%
Municipal government	63.9%
Public health	0.9%
Regional planning	1.1%
Social services	1.3%
Tribal organizations	0.3%
TOTAL	100.0%
ALL GOVERNMENT	72.1%
ALL EDUCATION	18.4%

July Sample Collection (panelists versus new respondents)



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](#).