

Northwest Arkansas

Quality of Life Survey Report

Walton Family Foundation Strategy,
Learning, and Evaluation Department

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WALTON FAMILY
FOUNDATION



Quality of Life in Northwest Arkansas

In the Home Region Program, the Walton Family Foundation aims to measurably impact the quality of life for Northwest Arkansas residents through focused investments in four strategic areas: coordinated economic development, arts and cultural amenities, education, and projects that create a sense of place. The foundation seeks to influence the quality of life in order to build opportunity and access in the communities where Sam and Helen Walton first found opportunity. The Walton Family Foundation is nearing the end of the most recent five-year strategic plan, and family-directed foundation investments in Northwest Arkansas have totaled nearly \$212 million between January 2015 and January 2019.

Defining and Measuring Quality of Life

A complete understanding of quality of life must include both quantitative and qualitative measures. The foundation has long tracked a number of quantitative quality of life indicators in the region related to economic prosperity – such as sales tax revenue, percent of residents with a bachelor’s degree, employment rates, and poverty levels. In 2012, the foundation collected qualitative measures for the first time using the Northwest Arkansas Quality of Life Survey. The survey was commissioned by the foundation’s Strategy, Learning, and Evaluation Department (SLED) in partnership with the Survey Research Laboratory (SRL) at Mississippi State University and was designed to gauge the extent to which residents are satisfied with life in the region and view Northwest Arkansas as “a great place to live.” In 2015, SLED again commissioned the SRL to conduct another survey to determine if the quality of life perceptions of Northwest Arkansas residents had changed over the previous three years. The third iteration of the Northwest Arkansas Quality of Life Survey, upon which this report is based, was conducted in late 2018. Northwest Arkansas was defined as Benton and Washington counties for this survey since this is the region that is the primary focus of the foundation’s Home Region Program.

Survey Purpose and Method

The 2018 Northwest Arkansas Quality of Life Survey has two primary goals:

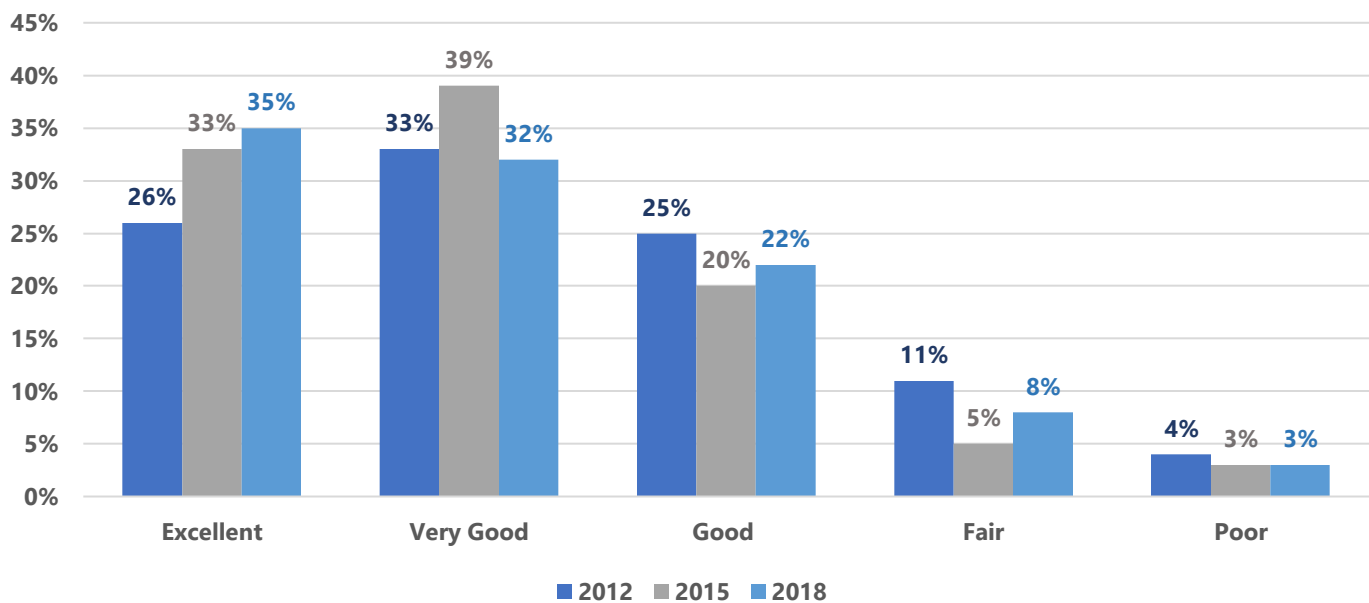
1. To evaluate the impact of foundation giving in the Northwest Arkansas community by tracking changes over time.
2. To inform strategic decisions about future grantmaking.

To accomplish these goals, residents were asked to provide their views on areas in which the foundation invests directly as well as areas commonly associated with quality of life which lie largely outside the scope of current Home Region investments.

SRL surveyed a representative sample of 966 residents in Benton and Washington counties between the ages of 20 and 64 on 109 unique survey questions. In cases where respondents did not provide answers, or indicated "Not Applicable", the number of valid responses varied. As such, total sample size varies by question.

KEY FINDINGS: Overall Quality of Life

Figure ES.1: Resident Perceptions of Overall Quality of Life



In general, Northwest Arkansans are happy and indicate they have a high quality of life.

- **67 percent** of residents rated their overall quality of life as "excellent" or "very good", a slight decline from 72 percent in 2015, as shown in Figure ES.1.
- **95 percent** of residents reported being "very happy" or "fairly happy" (no change since 2015).
- **49 percent** said that their overall quality of life has "significantly increased" or "increased" over the past year (no change since 2015).

Common themes about what most influences quality of life were family, financial security, and health, which were consistent with 2015 findings. The impact of family and friends increased by 16 percentage points since

2015. Specifically, 36 percent of respondents reported that friends and family exert the most important influence on their quality of life in 2018, as compared with 20 percent in 2015. The influence of health, financial security, and job opportunities remains similar to 2015.

An important change from the 2015 survey results concerns the reasons motivating people to move to Northwest Arkansas within the past five years. In 2015 job opportunities (36 percent) and friends and family (23 percent) primarily motivated respondents. This ranking order is now reversed: friends and family motivated 30 percent of those who moved to Northwest Arkansas in the last five years, while only 16 percent responded that career and job opportunities was the primary factor. This change may be indicative of an overall intangible, yet salient, increase in the quality of life Northwest Arkansas has to offer, one where interpersonal ties, rather than economic anxiety, influence intentions to relocate in the area.¹

These factors are in many ways outside of the influence of the foundation; however, as discussed below, residents report satisfaction with aspects of life that the foundation invests in (such as education) and high levels of usage of amenities supported by foundation investments (such as trails and Crystal Bridges). The evidence below suggests that the foundation is affecting positive perceptions of life in the region.

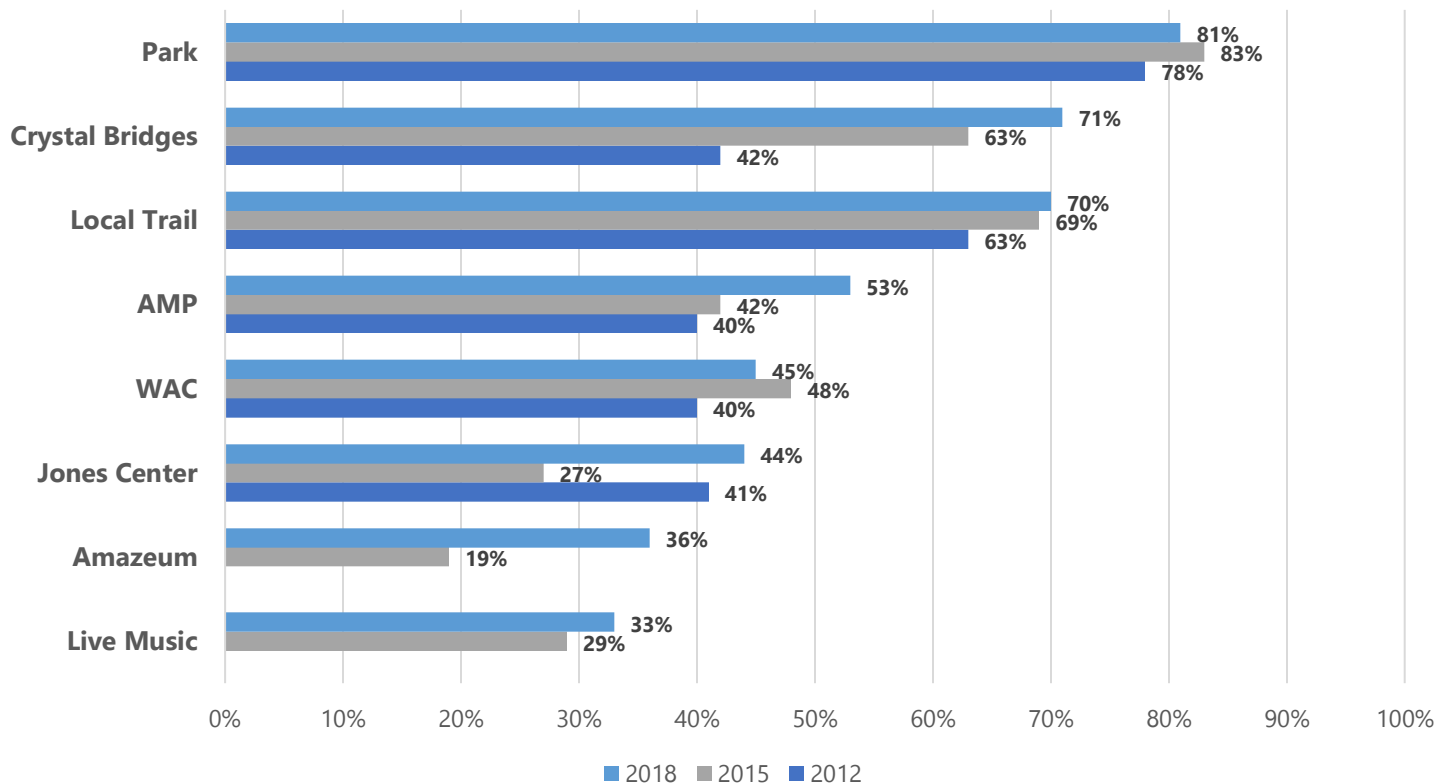
¹ According to the Bureau of Labor Statistics, the average unemployment rate for 2018 in both Washington and Benton counties was 2.6% and 2.8% respectively (more than one percentage point below the national average).

KEY FINDINGS: Walton Family Foundation Family-Directed Investment Areas

A. Arts and Cultural Amenities

Grantees include the Walton Arts Center, TheatreSquared, LatinX Theatre Project, Trike Theatre, Ra-Ve Cultural Foundation and the Fayetteville Roots Festival.

Figure ES.2: Residents Indicate High Amenity Usage



Amenities funded by the foundation were used by between 33 percent and 81 percent of residents during 2018.

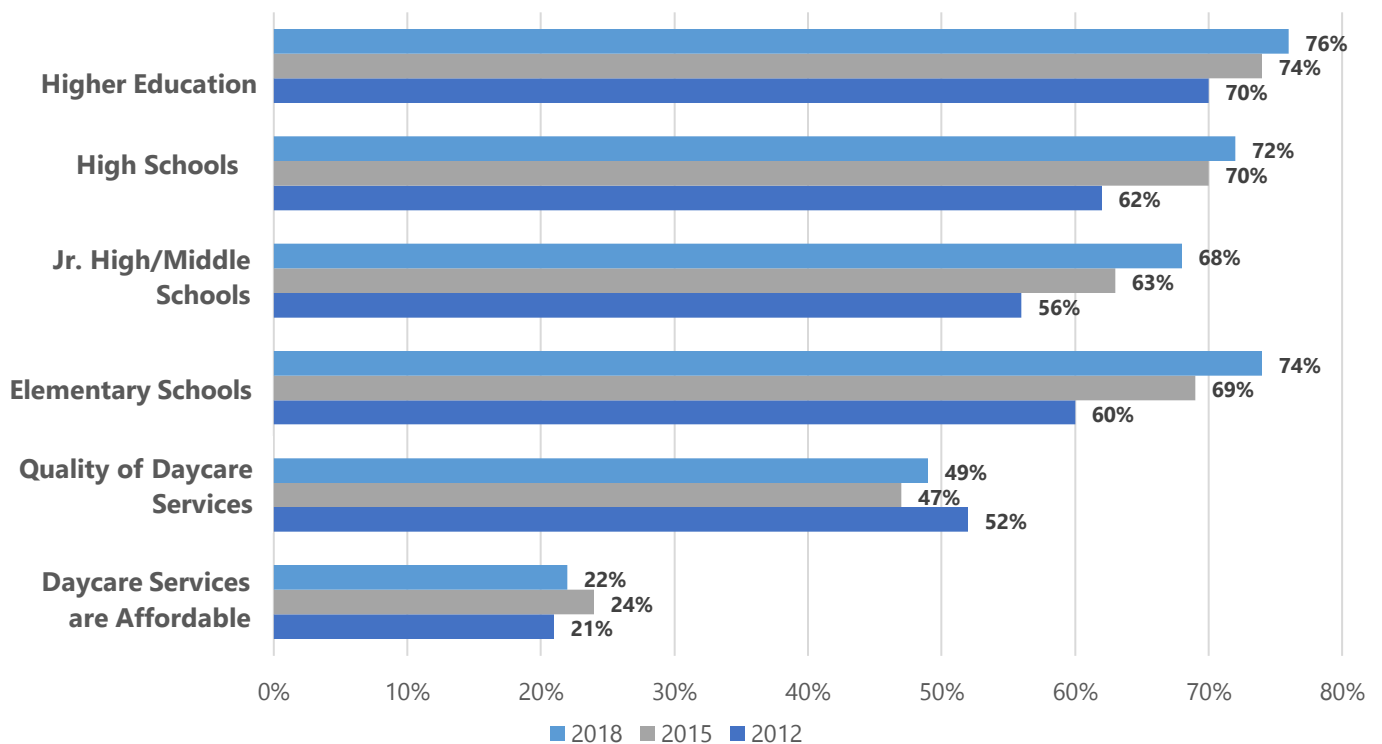
- Attendance at the Jones Center increased significantly (17 percentage points) since 2015.
- Increased attendance rates at all amenities are consistent for all races/ethnicities.
- Consistent with 2012 and 2015, wealthier residents reported using amenities more than less affluent residents, although usage increased across all income categories since 2015.
- Proximity also appeared to play a role in whether residents used a particular amenity. For example, Bentonville and Springdale residents reported visiting Crystal Bridges and the Jones Center, respectively, at higher rates than residents in other cities.

The survey also asked residents about which services and amenities they would like to see more of in Northwest Arkansas. Respondents' most frequently indicated top choices were mass transit (12 percent), restaurants and/or bars (11 percent), and professional sports (11 percent).

B. Education in Northwest Arkansas – Building a World-Class School System

Foundation Home Region education grantees include Rogers Public Schools, Helen Walton Children’s Enrichment Center, Arkansas Public School Resource Center, six public charter schools, and one independent school.

Figure ES.3: Resident Perceptions of Educational Quality and Daycare Affordability in NWA



Overall, about 68 to 76 percent of respondents perceived the quality of elementary school through higher education to be of good or very good quality. Forty-nine percent perceived daycare offerings in the region as high quality.² At the same time, only 22 percent of respondents considered daycare services affordable.

² Pre-K was phrased as “daycare” on the survey and is used interchangeably.

In addition, 54 percent of residents thought more K-12 school options would improve their community while 26 percent neither agreed nor disagreed. 18 percent of residents disagreed that increased school options would help their community.

C. Sense of Place

Grantees include the NWA Trailblazers, Northwest Arkansas Land Trust, Downtown Bentonville, Inc., the Northwest Arkansas Regional Planning Commission, and the cities of Bentonville, Fayetteville, Rogers, and Springdale.

- **Environment**

90 percent of respondents believe water pollution is not a problem, similar to 89 percent of respondents in 2015. Attitudes about air pollution are also positive, with 88 percent of respondents believing air pollution is not a problem (91 percent in 2015).

- **Trails and Parks**

70 percent of residents reported using the trails, which represents a slight increase from 2015 but a significant increase from 2012 (63 percent). Trail use had the third highest percent of residents reporting usage in the last 12 months behind parks (81 percent) and Crystal Bridges (71 percent).

While wealthier residents were more likely to report using the local trail system, residents of all income levels reported high rates of trail use. Trail use also differed by city of residence. Bentonville (74 percent) and Fayetteville (72 percent) had the highest reported trail use, with Rogers at 68 percent and Springdale at 66 percent. A significantly higher percentage of residents in Springdale and Rogers reported visiting the trails in 2018 compared to 2015, while the trail usage rate in Fayetteville was not significantly different from 2015 and in Bentonville was down from a high of 81 percent in 2015

- **Downtown Development**

Overall, 36 percent of respondents reported an increase in visits to downtown areas over the past year (34 percent in 2015), while 49 percent reported no change (versus 51 percent in 2015).³ Respondents

³ Questions related to downtown visits and activities were not a part of the 2012 survey.

were most likely to visit downtowns to dine (69 percent), shop (56 percent), and visit the farmers market (45 percent).

Only a few reported behaviors in downtowns had a strong relationship to income. Respondents in households earning over \$75K per year reported dining downtown at higher rates than lower income residents. Wealthier residents also reported visiting the farmers' market more often.

D. Economic Development and Infrastructure

The foundation's primary coordinated economic development grantees are the Northwest Arkansas Council Foundation, Startup Junkie Foundation, Endeavor Northwest Arkansas, Arkansas Governor's Cup and the Northwest Arkansas Community College Foundation.

Regarding the airport and flights:

- 44 percent of residents said that the airport provides adequate routes, which is a marginal increase from 41 percent in 2015 and 39 percent in 2012.
- 28 percent said flights were affordable, which is similar to rates of 26 percent in 2015 and 27 percent in 2012.
- 52 percent of residents said that the airport provides flights at convenient times, in line with 51 percent in 2015 but a significant increase from 43 percent in 2012.

KEY FINDINGS: Other Quality of Life Areas Not Funded By The Walton Family Foundation

A. Crime and Safety

Northwest Arkansas residents generally do not view crime as a problem, with about 99 percent reporting feeling fairly or very safe at home (93 percent in downtown areas) during the day. This perception is consistent with the fact that Northwest Arkansas has a violent crime rate that is well below the state's and slightly below the nation's. In 2016, the Fayetteville-Springdale-Rogers MSA had 376 violent crimes per 100,000 residents in 2016, much lower than the Arkansas average of 551 and slightly lower than the national average of 386⁴.

Perceptions of dangerous driving remained the top problem in the community for all Northwest Arkansas residents (43% in 2018 versus 44% in 2015). Notably, 42% of respondents identified alcohol and drug problems as significant concerns in their community.

B. Civic Engagement

Overall, community engagement in Northwest Arkansas is comparable to, and in some cases exceeds, national averages. For example, the region's reported voting rate (60 percent) significantly exceeded both the reported voting rates in 2015 and 2012 (47% and 41% respectively) and the national average in 2018 (47 percent).⁴ The majority of residents (59 percent) also expressed confidence in local government decision-making; this is seven percentage points higher than the 52 percent reported on the 2015 survey.

C. Health Care

The majority of residents who offered an opinion are satisfied with access to medical care in Northwest Arkansas. Approximately, 72 percent report having good or very good access to their health care provider, 83 percent report having good or very good access to medical services for their child locally, and 56 percent report having good or very good access to mental health care services. On the other hand, these numbers imply that one in four do not have good access to their health care provider, and a sizable minority do not have good access to mental health care services. Overall percentages show modest improvements compared to 2015, when the answers to the same questions stood at 64%, 78%, and 53%, respectively.

Similarly, residents appear satisfied with the quality of care they receive at their local doctor and hospital. 80 percent rate the quality of care at their local doctor as good or very good (78 percent in 2015), and 70 percent do so for their local hospital (66 percent in 2015). Although lower income residents reported concerns related to health care (affordability, access, quality, access for kids) at higher rates than wealthier residents, only 18 percent of all residents believe that their ability to afford needed medical care is poor or very poor, which is statistically unchanged from 2015 (19 percent) and lower than 2012 (31 percent). Overall, concerns about affordability of health care continue to trend positively.

D. Diversity and Inclusion

In 2018, 87 percent of residents said they felt accepted by people in the local community (similar to 2015). Although all races reported high levels of acceptance (at least 72 percent for all groups), there was a

⁴ Questions related to safety in neighborhood during the day were not part of the 2018 survey.

⁵ This could be due in part to the degree to which survey timing falls during or just after significant elections, so the trend should be interpreted with caution.

statistically significant difference by race: 26 percent of African American respondents reported low levels of acceptance compared to whites (5 percent) and Latinx (3 percent).

In addition, as in 2015, low-income residents report feeling accepted at slightly lower rates compared to wealthier residents. While this implies a positive correlation between income and acceptance (i.e. higher income, more acceptance), the sense of acceptance among households earning below \$50,000 was still high in absolute terms at 83 percent. All in all, Northwest Arkansas residents generally feel accepted in their communities regardless of income level.

In 2018, nearly two out of three respondents (64 percent) said that different lifestyles and cultures make Northwest Arkansas a better place to live. This figure is significantly higher when compared to 60 percent in 2015 and 59 percent in 2012.

Impact of Walton Family Foundation Investments and Survey Implications

Positive perceptions about the overall quality of life in Northwest Arkansas are high. While top reasons are related to family and income, the foundation appears to be playing a key role in contributing to positive perceptions about life in the region. Especially considering high participation rates for foundation-funded amenities, investments made by the foundation appear valued by local residents.

Overall Quality of Life

Resident Perceptions

- Northwest Arkansans are happy (95 percent).
- 67 percent would rate quality of life as excellent or very good, a slight decrease from 72 percent in 2015. However, 49 percent reported an increase in quality of life from last year.
- Top factors driving quality of life among those offering valid responses are family/friends (26 percent) and financial security (10 percent).

Arts & Culture

Resident Perceptions

- 8-percentage point increase in attendance rate at Crystal Bridges since 2015; 17 percentage point increase in attendance at the Jones Center since 2015.
- Use of amenities is affected by income and proximity. Usage has overall increased across all races.⁵

Education

Resident Perceptions

- Although 49 percent of residents believe daycare quality is good or very good, only 22 percent think it is affordable (24 percent in 2015).
- Overall, 68 to 76 percent of respondents perceive the quality of elementary school through higher education to be of good or very good quality.
- 54 percent of residents support increasing K-12 school options (no change since 2015), while only 18 percent oppose it.

Diversity and Inclusion

Resident Perceptions

- 87 percent of respondents felt accepted by people in their local community; no significant change from 2015 or 2012.
- 64 percent of respondents said different lifestyles and cultures and the region's increasing diversity make Northwest Arkansas a better place to live, a 4-percentage point increase from 2015.

Environment

Resident Perceptions

- 88 percent do not think air pollution is a problem (93 percent in 2015).
- 90 percent do not think water pollution is a problem (91 percent in 2015).

⁶ Due to the low number of non-white racial respondents in the sample, meaningful comparisons based on race cannot be drawn.

Trail Usage

Resident Perceptions

- 70 percent said they used the trails in the past year (compared to 69 percent in 2015). 96 percent reported using the trails primarily for recreation. Only 2 percent reported commuting as their primary use of the trail system.
- There were differences in trail usage by city: Rogers residents reported using the trails significantly more in 2018 (68 percent) than in 2015 (61 percent). Likewise, Springdale residents saw a significant increase in trail usage from 53 percent in 2015 to 66 percent in 2018. Usage rates in Bentonville (74 percent), and Fayetteville (72 percent) remained high.

Downtowns

Resident Perceptions

- 36 percent of residents reported an increase in visits to downtown over the last year, while 49 percent reported no change.
- The use of farmers' markets and downtown dining was higher for wealthier residents. Downtown visits for other purposes did not differ by income category.

Coordinated Economic Development

Resident Perceptions

- Only 28 percent of respondents said flights from Northwest Arkansas are affordable, while 44 percent said airport had adequate routes.
- When asked which three services and amenities residents would like to see more of in Northwest Arkansas, about 1 in 5 (20%) included mass transit in their list.
- 12 percent of residents consider mass transit to be of utmost importance to them (most popular choice).

Crime and Safety

Resident Perceptions

- During the day, 99 percent of residents feel safe at home, and 93 percent in downtown. After dark the above figures drop by 3 and 11 percentage points, respectively.
- The perception of drugs and alcohol as a problem within the community is trending up. 42% of residents indicated this as a problem in 2018, a significant increase from 2015 (35%) and 2012 (34%).
- Dangerous driving is a significant concern for 43 percent of residents.

Civic Engagement

Resident Perceptions

- Self-reported voter participation rates are higher than national averages (60 percent voted in Northwest Arkansas in 2018).

Health care

Resident Perceptions

- The majority of all residents are satisfied with the quality of local health care.
- Most residents with an opinion believe they have good access to medical care, both at hospital and with doctor. 24 percent note problems with access to mental health services.
- About 1 in 5 residents (18 percent) report they are unable to afford needed medical care, virtually unchanged from 2015 (19 percent), but a significant improvement from 2012 (31 percent). This figure increased to 25 percent for residents in households with income below \$75,000. Perception of affordability did not vary significantly by race or gender.

Next Steps

The Northwest Arkansas Quality of Life poll was designed to provide a broad overview of residents' perceptions of quality of life in the region, with particular attention to the foundation's four locally focused strategies. In most cases, the results validate the foundation's strategic investments and showcase improved perceptions among residents on most dimensions of quality of life.

INTRODUCTION AND SURVEY OVERVIEW

A. Quality of Life in Northwest Arkansas

In the Home Region Program, the Walton Family Foundation aims to measurably impact the quality of life for Northwest Arkansas residents through focused investments in four strategic areas: world-class schools, arts and culture, economic development, and sense of place. The ultimate goal of influencing the quality of life for residents is to assist regional employers in their efforts to recruit and retain high-quality associates at all levels.

B. Defining and Measuring Quality of Life

To measure quality of life for Northwest Arkansas residents, the concept must be defined first. The definitions and the indicators used in the literature have varied considerably depending on the level of analysis (international, national, local) and available information. But, regardless of context, a complete understanding of quality of life must include both quantitative and qualitative measures. For example, in the international context, quality of life is largely operationalized through quantitative measures; these include health indicators such as infant mortality rates, economic indicators such as per capita GDP, and social indicators such as democratic engagement. However, such studies may also include qualitative measures of a population's feelings about their well-being and life satisfaction, or happiness.

While the foundation has long tracked a number of quantitative quality of life indicators in the region related to economic prosperity, such as sales tax revenue, percent of residents with a bachelor's degree and poverty levels, related qualitative measures were not previously collected in a systematic way prior to 2012. The 2012 and 2015 Northwest Arkansas Quality of Life Survey, commissioned by the Walton Family Foundation Strategy, Learning, and Evaluation Department, were designed to fill that gap by gauging the extent to which residents view Northwest Arkansas as "a great place to live." The third iteration of the Northwest Arkansas Quality of Life Survey, upon which this report is based, was conducted in late 2018.

Northwest Arkansas was defined as Benton and Washington counties for this survey, since this is the region that is the primary focus of the Foundation's investments.

C. Survey Purpose

The 2018 Northwest Arkansas Quality of Life Survey has two primary goals:

1. To evaluate the impact of foundation giving in the Northwest Arkansas community, including tracking changes over time; and
2. To inform strategic decisions about future grantmaking.

To accomplish these goals, residents were asked to provide their views on areas in which the foundation invests directly and areas commonly associated with quality of life in which the foundation is not currently investing.

D. Survey Administration and Content

In August 2012, September 2015, and September 2018 the Strategy, Learning, and Evaluation Department partnered with the Mississippi State University Survey Research Laboratory (SRL) to administer a telephone survey to a representative sample of working-age (20-64 years old) Benton and Washington counties residents (966 in 2018, 1035 in 2015; 815 in 2012). The survey script was developed in collaboration with foundation staff and included 109 questions (92 content questions; 17 demographic/context questions) as follows:

Table 1: Survey Content

Category	Number of Questions	Sample Questions
Overall perceptions of quality of life	29	Overall, how would you rate your quality of life? Would you say...? (Excellent, Very Good, Good, Fair, Poor, Don't Know)
Resident perceptions of their satisfaction in the four strategy areas in which the foundation directly invests	43	Different K-12 school options, including independent schools, would be a good addition to my community. Would you say you: (Strongly agree, Agree, Neither agree nor disagree, Disagree, Strongly disagree, Don't know/not sure, Refused)
Probe topics commonly associated with life satisfaction that are not currently included in the strategic plan but are commonly used in	20	Example: Have you voted in the past 12 months? (Yes, No)

The content of this survey is not directly comparable to other local or national quality of life surveys. These differences occur because: 1) it was important to include content specific to the Northwest Arkansas region; and 2) many other quality of life surveys ask different questions or ask questions about similar themes in different ways.

Both landline and cellphone users were contacted, and interviews lasted approximately eight minutes. The reported cooperation rate was 23 percent, and the foundation was not explicitly identified unless the respondents asked. The resulting data was weighted according to geo-demographic characteristics for both Benton and Washington counties.

The next three sections provide the results from the survey. They are organized as follows:

1. General perceptions about overall quality of life in Northwest Arkansas
2. Foundation investment areas
 - Arts and Culture
 - Education
 - Sense of Place
 - Environment
 - Trails and Parks
 - Downtowns
 - Economic Development and Infrastructure
3. Other quality of life topics
 - Crime and Safety
 - Diversity and Sense of Acceptance
 - Civic Engagement
 - Health

Each section begins with an overview of foundation investments related to the relevant survey results. Then survey results are presented in a variety of formats.

1. GENERAL PERCEPTIONS ABOUT OVERALL QUALITY OF LIFE

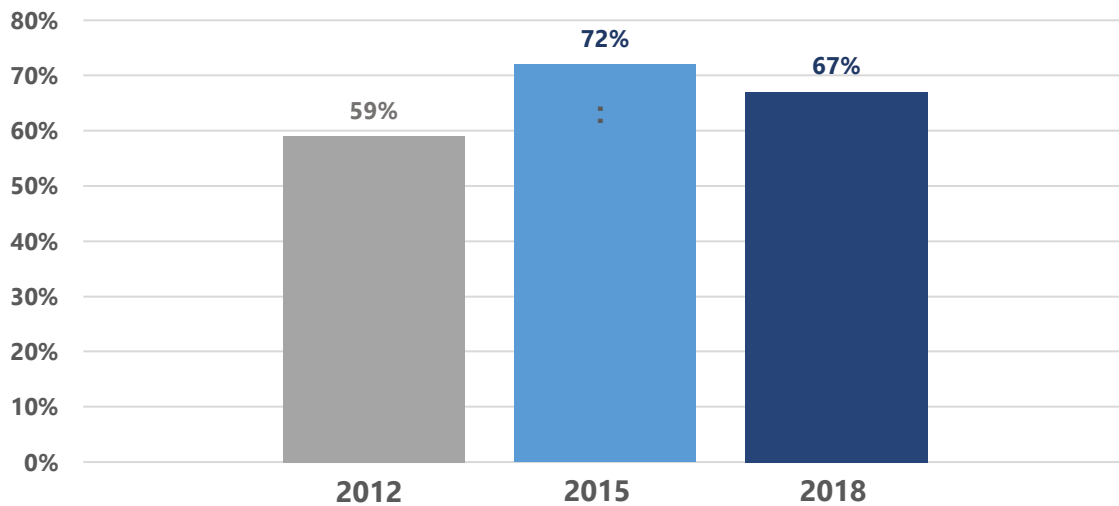
Foundation Investments

The Home Region Program is nearing the end of its current five-year strategic plan (2015-2020), which has informed the strategies and initiatives covered in the Quality of Life survey. From January 2015 through January 2019, the Program invested \$212 million in Northwest Arkansas through the family-directed budget administered by the Home Region Program.

Results

In general, Northwest Arkansans report a high quality of life, as shown in Figure 1.

Figure 1: Resident Perceptions of Overall Quality of Life



Percent of residents rating Quality of Life as "Excellent" or "Very Good"

Key Quality of Life Drivers

Common themes about what most influences quality of life were family, finances, and health. While family and finances were consistent from 2012, financial security is a new theme in 2018 replacing health. This change could be related to the bounce back from the recession as the Northwest Arkansas metro area now has an unemployment rate of 2.3 percent, well below the national average of 3.7 percent. Below is a comparison of

responses between the most important influences on quality of life and reasons why people moved in the last five years.

These data indicate the main forces driving quality of life for most people are outside the scope of foundation investments. However, as noted below, residents have demonstrated that they value amenities funded by the foundation.

Table 2: Most Important Influences on Quality of Life and Reasons for Moving to Northwest Arkansas

Most Important Influences on quality of life <i>(n=444 or 46% of the sample)</i>	Why people moved to Northwest Arkansas in the last five years <i>(n=107 or 11% of the sample)</i>
Family and Friends (26%) Financial Security (11%) Health (7%) Job Satisfaction (5%)	Friends and Family (30%) Career, Job, Education (16%) New Environment (7%)

Residents also provided the following information on other quality of life questions:

1. **Quality of Life Changes in the Past 12 Months:** Only 1 in 10 residents (10 percent) said their quality of life had decreased or significantly decreased in the past 12 months. While this percentage is virtually unchanged from 2015, it is a statistically significant improvement compared to 2012 (16 percent).
2. **Not Enough Money to Meet Basic Needs:** 12 percent of respondents report they do not have enough money to meet their everyday needs. Again, this figure suggests a persistent positive trend as it denotes a significant 12-percentage point improvement from 2012, when 24 percent of respondents said they did not have enough money to meet basic needs.
3. **Those Planning to Leave:** When asked if they planned to leave Northwest Arkansas in the next five years, 72 percent said “no” (78 percent in 2015). Of the 22 percent who said “yes”, the top two reasons identified for leaving were: 1) job, salary (24 percent) and 2) friends and family live elsewhere (12 percent). A comparison of the two groups on relevant characteristics is in Table 3 below. The figures suggest that, on average, people planning to stay are slightly older and have lived in the area longer. No differences, however, can be identified on the basis of income or education. To provide additional

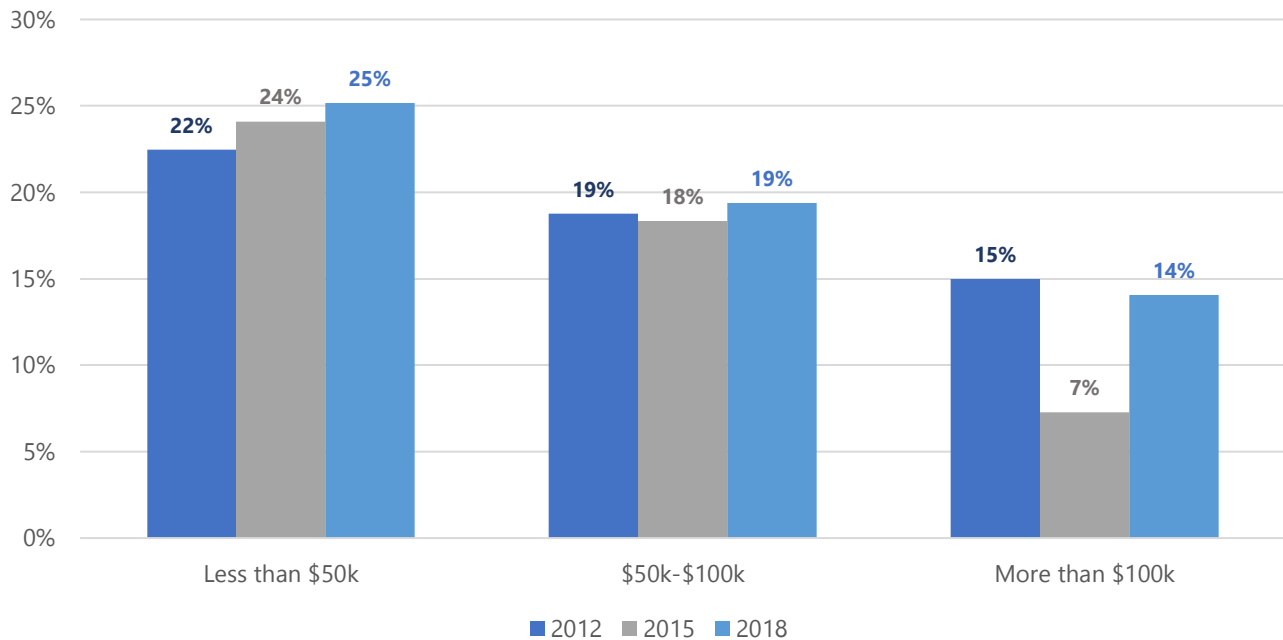
context, net migration to Northwest Arkansas (Benton and Washington counties) over the past three years was 34,702 people, representing a population increase of 7%.

Table 3: Comparison of Characteristics of Northwest Arkansas Residents Planning to Leave in the Next 5 Years and Those Who Plan to Stay

	Those Who Plan to Stay (72%, n=700)	Those Who Plan to Leave (22%, n=213)
Average Age	42	36
Median Age	42	33
Average Years Lived in Northwest Arkansas	23	17
Median Years Lived in Northwest Arkansas	22	16
Median HH Income Range	\$50,000-\$75,000	\$50,000-\$75,000
Median Education Level	Some College or Vocational Program	Some College or Vocational Program
Percent with at Least a Bachelor's Degree	30%	30%

The following two graphs provide some additional information about people who reported intending to stay and those intending to leave within the next five years, based on more detailed demographic information. Figure 2 shows the percentage of residents who are planning to leave the area by household income. In general, as household income increases, residents' intent to leave within the next five years decreases.

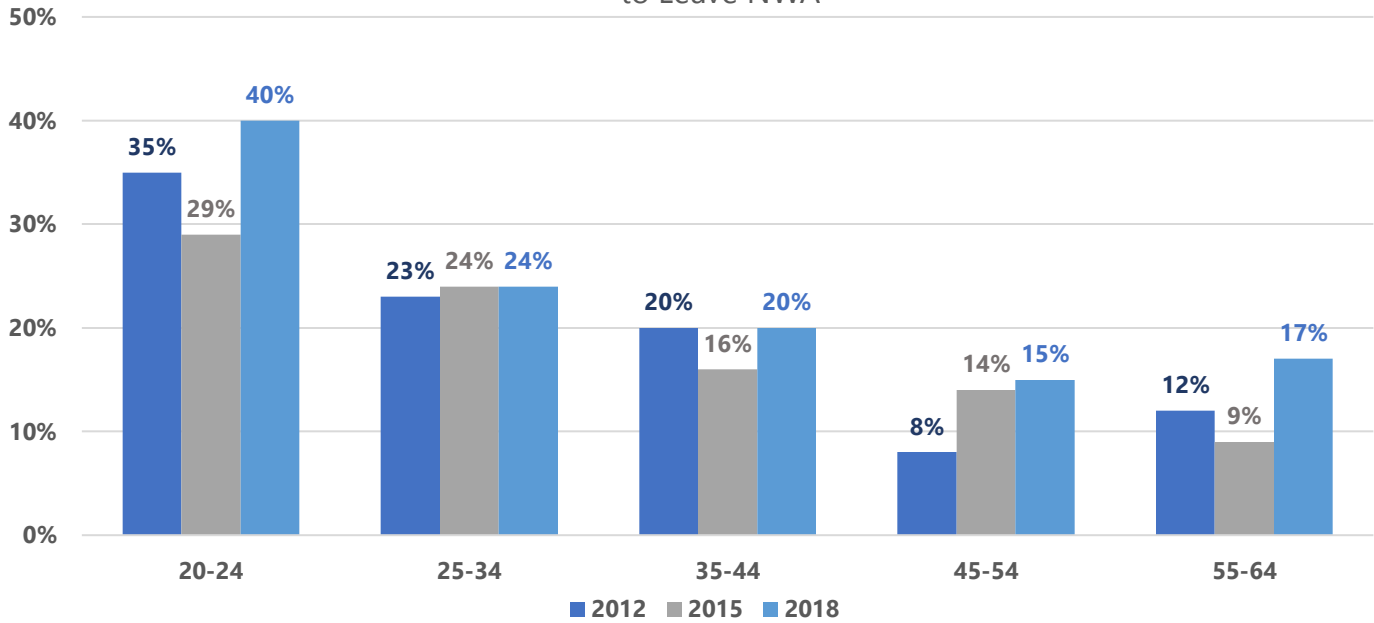
Figure 2: Relationship Between Intent to Leave Northwest Arkansas and Household Income



Specifically, 25 percent of residents earning under \$50k indicated intent to leave Northwest Arkansas within the next five years, as opposed to 19 percent of residents earning between \$50k and \$100k. These percentages are not significantly different from earlier years. Among wealthier residents (in households earning at least \$100k) in 2018, 14 percent of residents reported their intention to leave the area. This number is in line with high-income residents in 2012 and significantly higher than in 2015. In general, wealthier residents are likelier to intend to stay, although the degree to which these patterns translate into actual geographic mobility is unclear.

The second graph (Figure 3) shows the percent of residents in each age bracket who anticipate leaving Northwest Arkansas in the next five years. As anticipated, in all three surveys, residents become more unwilling to move as they age. A closer examination of the age brackets reveals the proportion of younger residents (20 to 24 years old) who intend to leave Northwest Arkansas has increased by 11 percentage points since 2015; quite interestingly, the percentage of the older residents (55 to 64) with an intention to leave has almost doubled over the past three years, from 9 percent in 2015 to 17 percent in 2018.

Figure 3: Percent of Residents in Each Age Bracket Reporting Intent to Leave NWA



Implications

There are a number of clear patterns in how Northwest Arkansas residents view their quality of life and their intent to remain in the area or to leave. The most important factors driving quality of life, influencing decisions to move here, and influencing decisions about staying in the area vary in their order, but are consistently: 1) family and friends; and 2) salary/career prospects/financial stability.

Our overall interpretation of survey responses is that residents see the lifestyle in the area as appealing. Results in the following section suggest that this is, in part, due to foundation investments in its four strategic funding areas, particularly in amenities. At the same time, it is also fair to say there are likely other factors, such as low crime rates, a relatively small town feel, and strong social ties, which may contribute as well.

2. FOUNDATION INVESTMENT AREAS

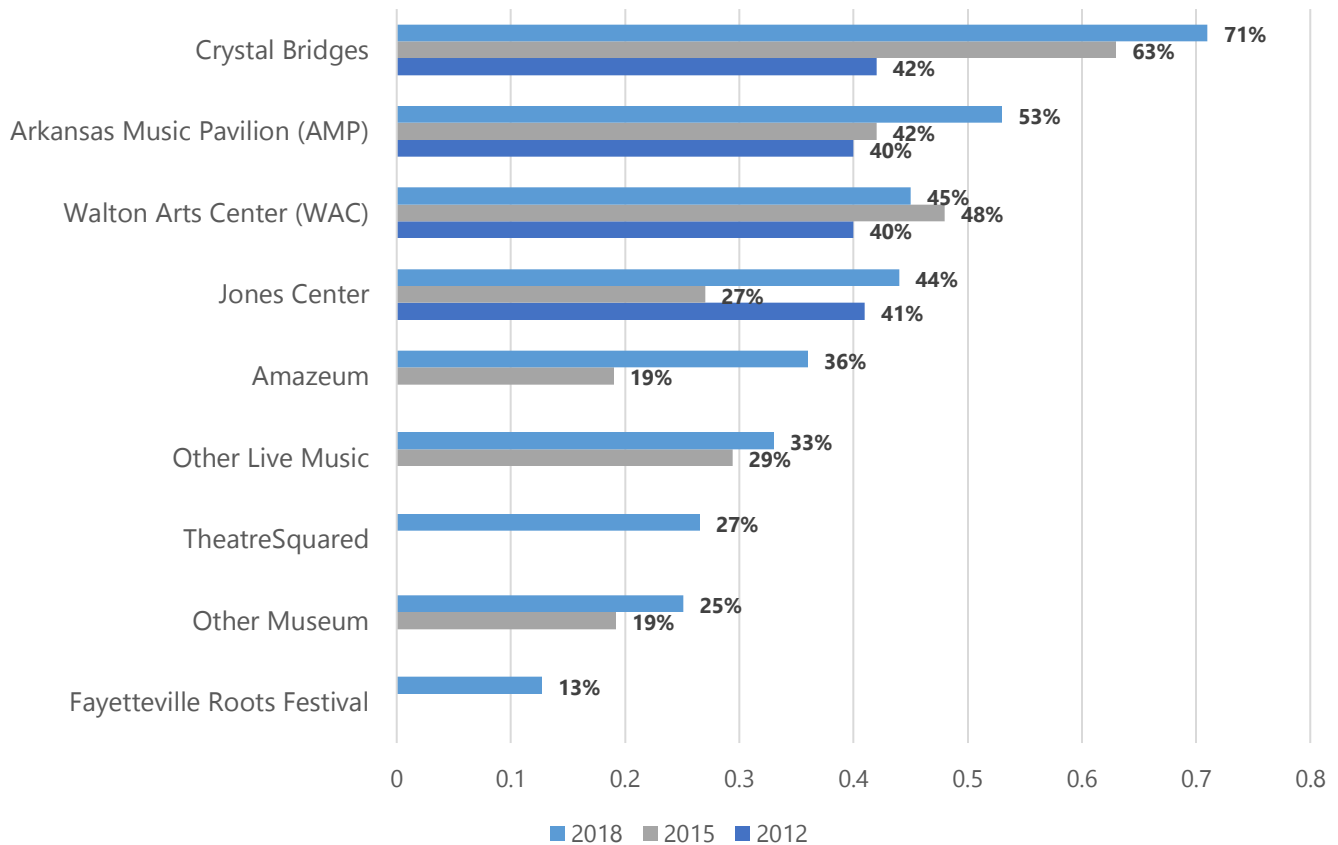
A. ARTS & CULTURE

Investments

Grantees include the Walton Arts Center, TheatreSquared, LatinX Theatre Project, Trike Theatre, Ra-Ve Cultural Foundation and the Fayetteville Roots Festival.

As Figure 4 below shows, usage rates of arts and cultural amenities by Northwest Arkansas residents in 2018 varied significantly, from 13 percent (Fayetteville Roots Festival) to 71 percent (Crystal Bridges). Significant increases in self-reported attendance by residents were seen between 2015 and 2018 at Crystal Bridges (from 63 percent to 71 percent), the AMP (from 42 percent to 53 percent), the Jones Center (from 27 percent to 44 percent), and the Amazeum (19 percent to 36 percent).

Figure 4: Reported Arts Amenity Usage by Residents



Results

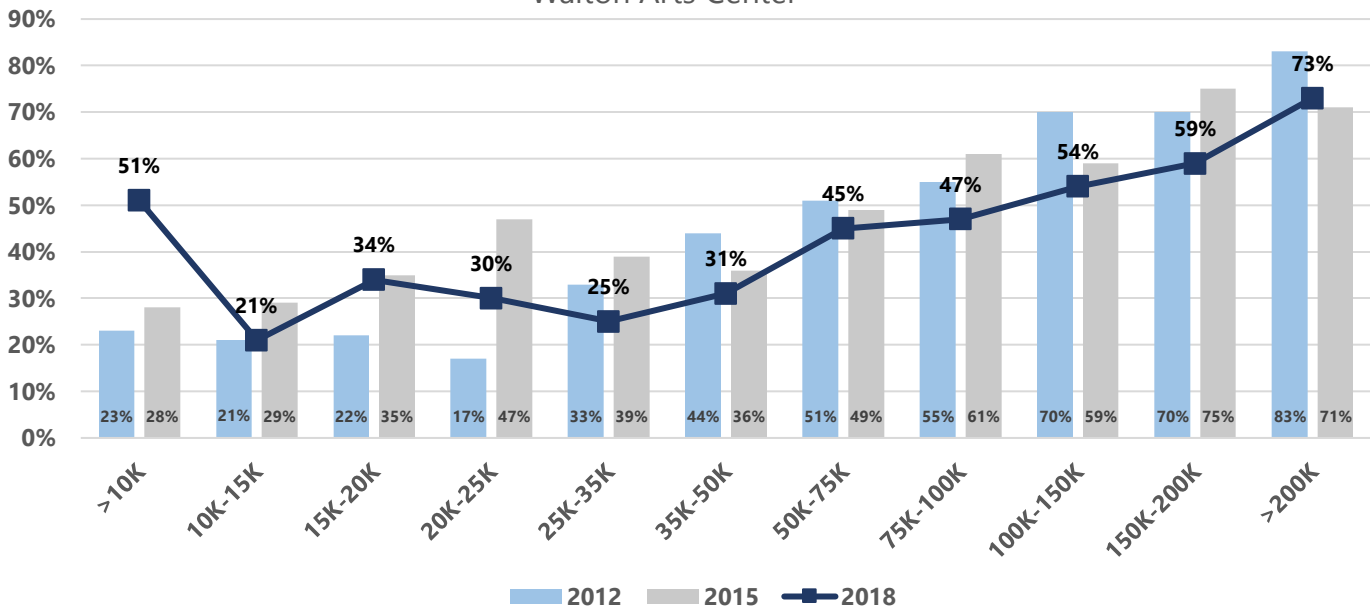
In addition to reviewing residents' overall self-reported rates of attendance and use of area amenities, usage patterns of foundation-funded amenities were also analyzed by income, education, and city. A statistical difference was found in attendance rates by income for two of the amenity investments. As indicated in Figures 5 and 7 below, there is a positive relationship between attendance rates and income for WAC and Crystal Bridges — i.e., wealthier residents report using these amenities more often than less affluent residents.⁶

⁷ In 2012 the question about WAC attendance rates included the AMP as well. In 2015 and 2018, AMP attendance rates were asked separately.

Walton Arts Center (WAC)

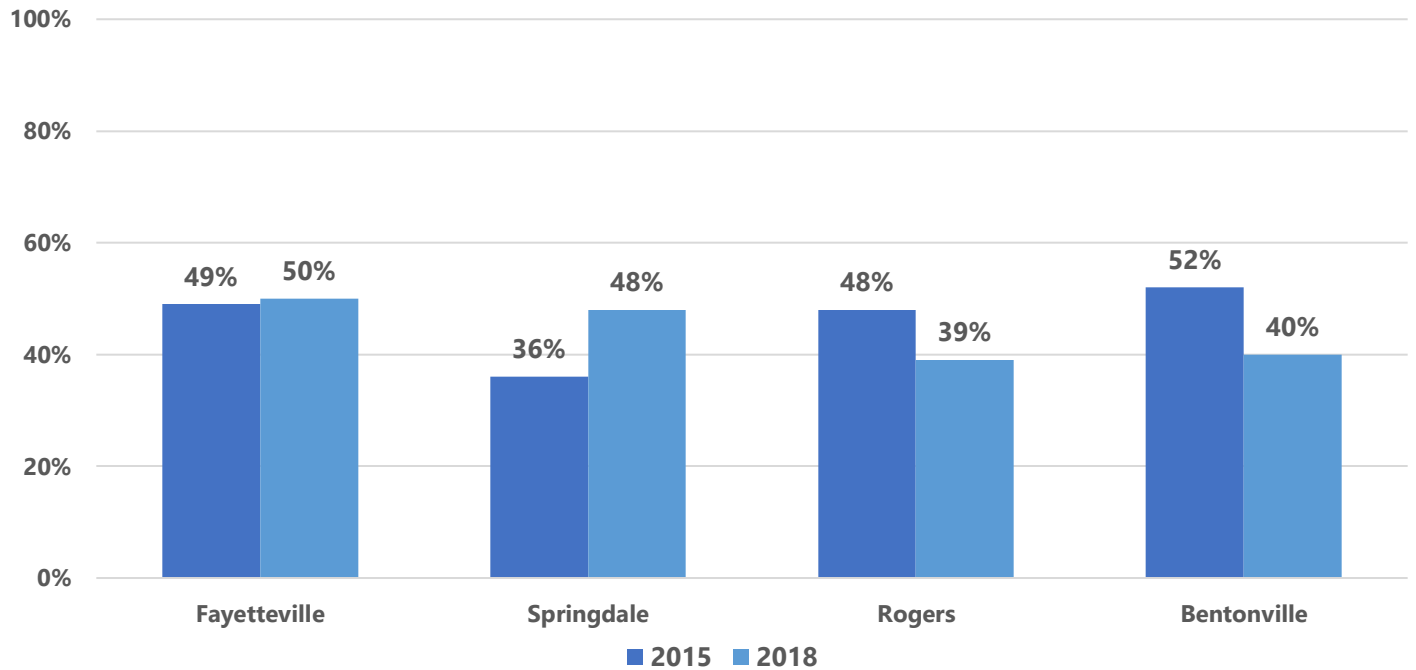
The *overall* reported attendance rate at WAC decreased from 48 percent in 2015 to 45 percent in 2018, although this decline was not statistically significant. When compared to 2015, in 2018 the WAC attendance declined slightly among all but the least affluent residents (53% in 2018 vs. 28% in 2015; see Figure 5); given its location in downtown Fayetteville, this finding is likely influenced by attendance rates among university students with zero or negligible direct income.

Figure 5: Relationship Between Household Income and Attendance Rate, Walton Arts Center



As shown below in Figure 6, residents of two cities reported a significant decrease in WAC attendance rates over the past year when compared to 2015: Bentonville (40 percent in 2018, 52 percent in 2015) and Rogers (39 percent in 2018, 48 percent in 2012). Residents of Springdale reported attending WAC at higher rates in 2018 than in 2015 (an increase of 8 percentage points from 36 percent to 48 percent), while attendance among Fayetteville residents was stable.

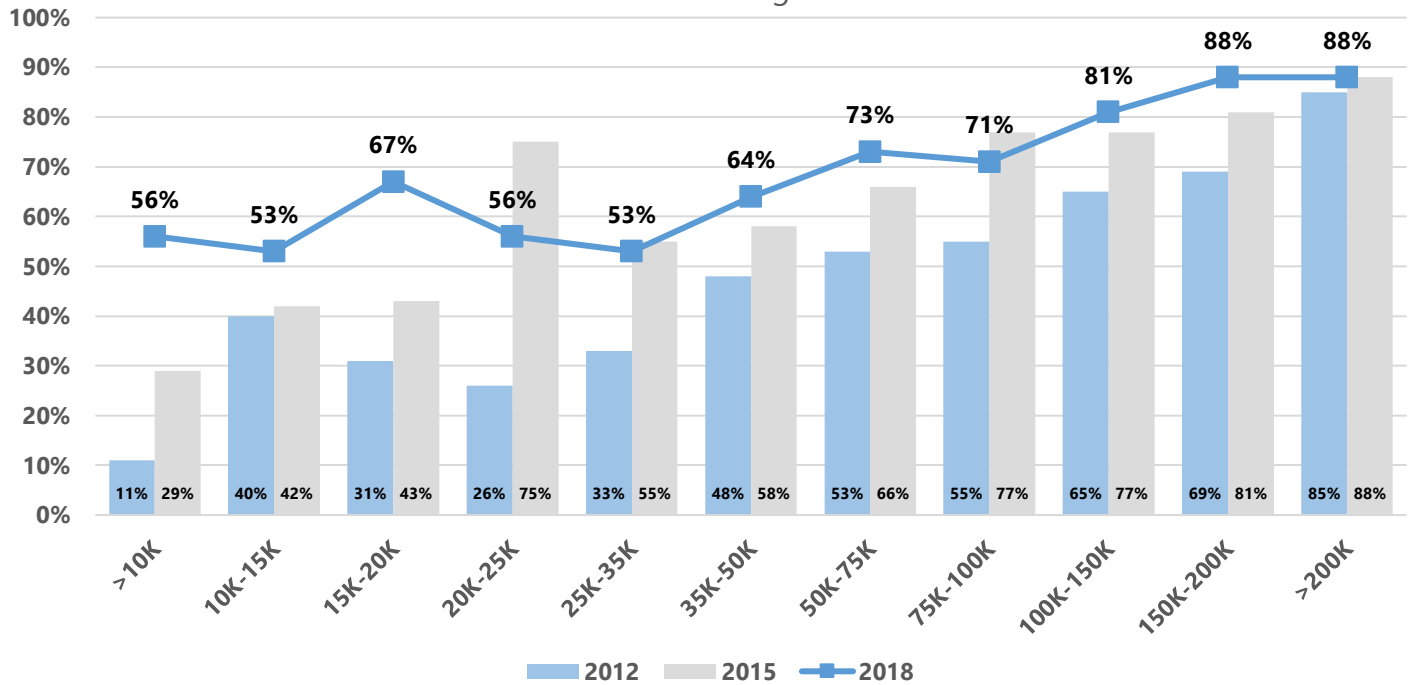
Figure 6: Percentage of Respondents Visiting the WAC per Geographic Location



Crystal Bridges

In 2018, Crystal Bridges experienced a substantial overall *increase* in resident attendance rates compared to 2015, from 63 percent to 71 percent. Similar to WAC attendance, wealthier residents reported visiting Crystal Bridges at higher rates than less affluent residents. Most interestingly, a chart looking at the attendance rate by income bracket in 2018 shows consistent increases across all incomes (Figure 7). Looking at attendance by race and ethnicity, Asians reported an 88 percent attendance rate, while whites (70%), African Americans (69%), and Hispanics (73%) attended at rates similar to the overall population (71%).

Figure 7: Relationship Between Household Income and Attendance Rate, Crystal Bridges



There were also notable increases in Crystal Bridges attendance rates by resident education level (Figure 8) and resident geography (Figure 9), with significant increases in attendance rates from Fayetteville and Springdale. Reported attendance to Crystal Bridges increased across all education categories since 2015, as well as among residents of all cities except Bentonville (76 percent, no change since 2015).

Figure 8: Relationship Between Education Level and Attendance Rate, Crystal Bridges

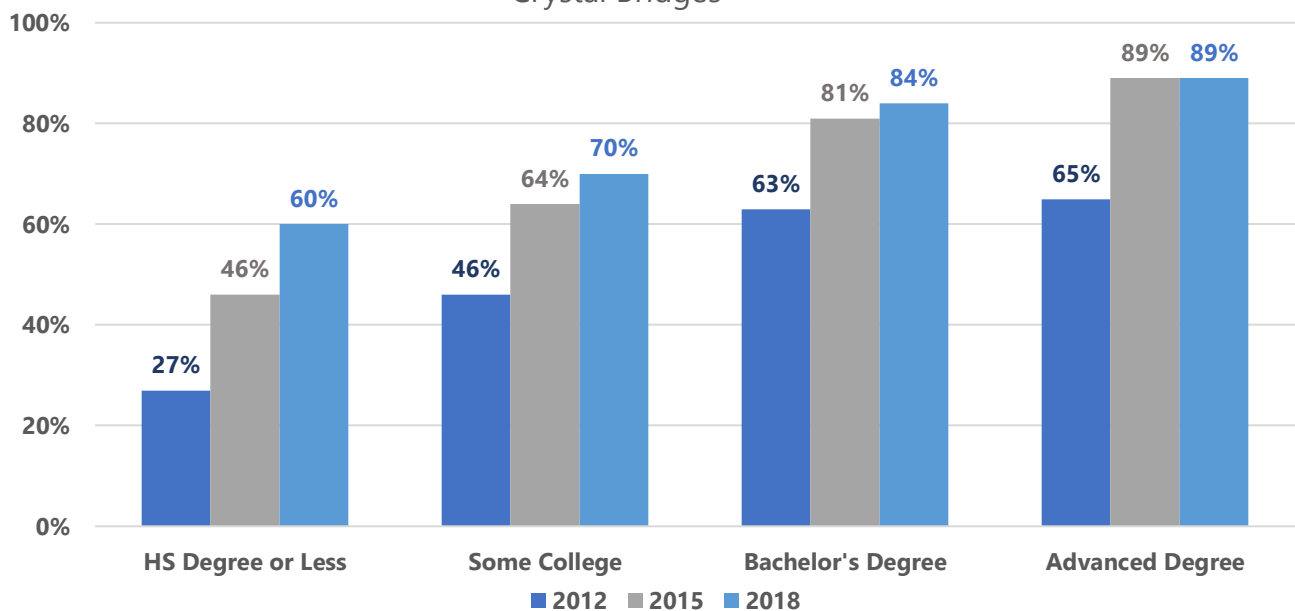
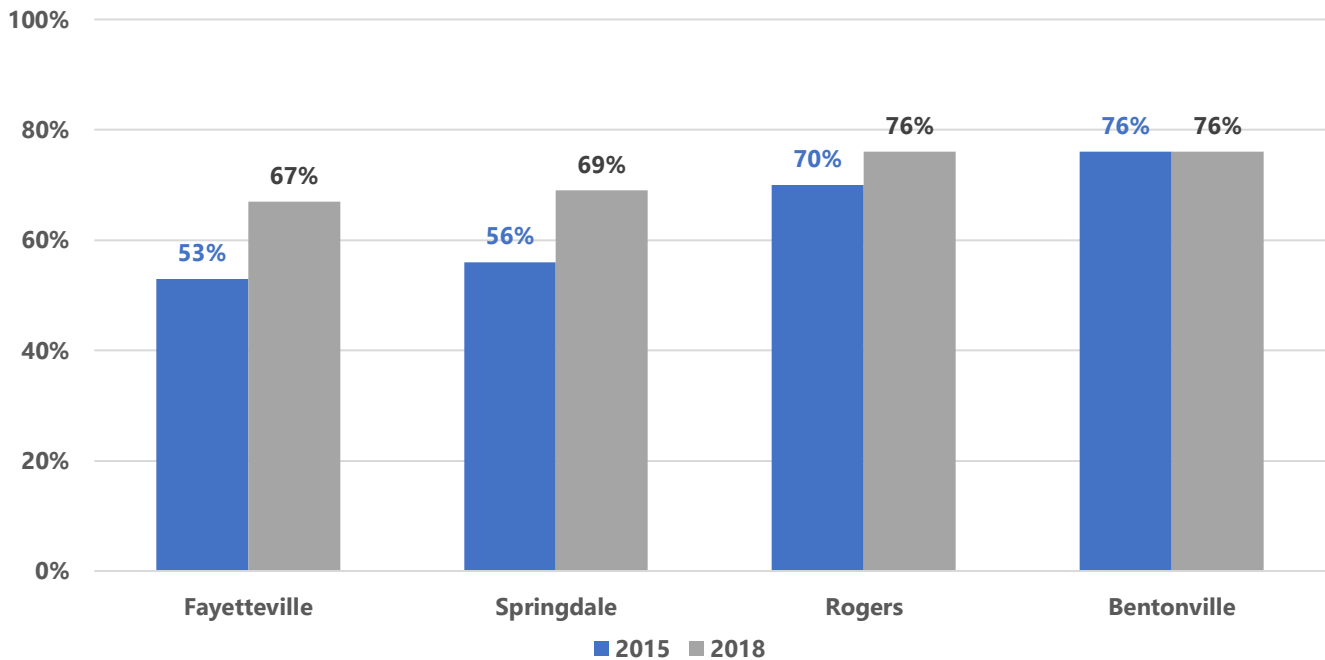


Figure 9: Relationship Between City of Residence and Attendance Rate, Crystal Bridges



Jones Center

Reported visits to the Jones Center increased significantly since 2015, with 44 percent of residents reporting visiting the Jones Center at least once in 2018, a large and statistically significant 17-percentage point increase from 2015 (27 percent).

Regarding the relationship between the Jones Center’s attendance rates and household income, there is no discernible overall pattern; if anything, attendance rates are slightly higher among lower-income residents. As apparent in Figure 10 below, although the Jones Center experienced a sharp decline in attendance in 2015, the 2018 attendance rates have returned to the already high 2012 levels. This pattern holds when looking at usage rates by city of residence. (Figure 11).

Figure 10: Relationship Between Household Income and Attendance Rate, Jones Center

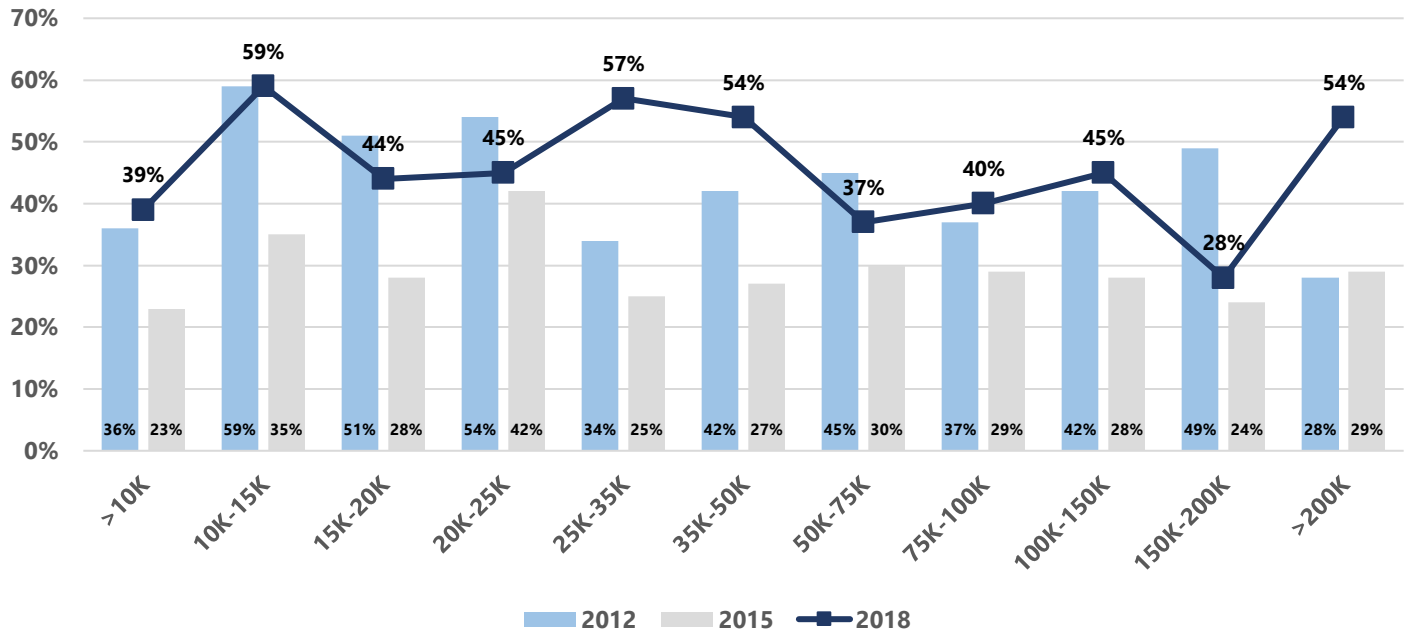
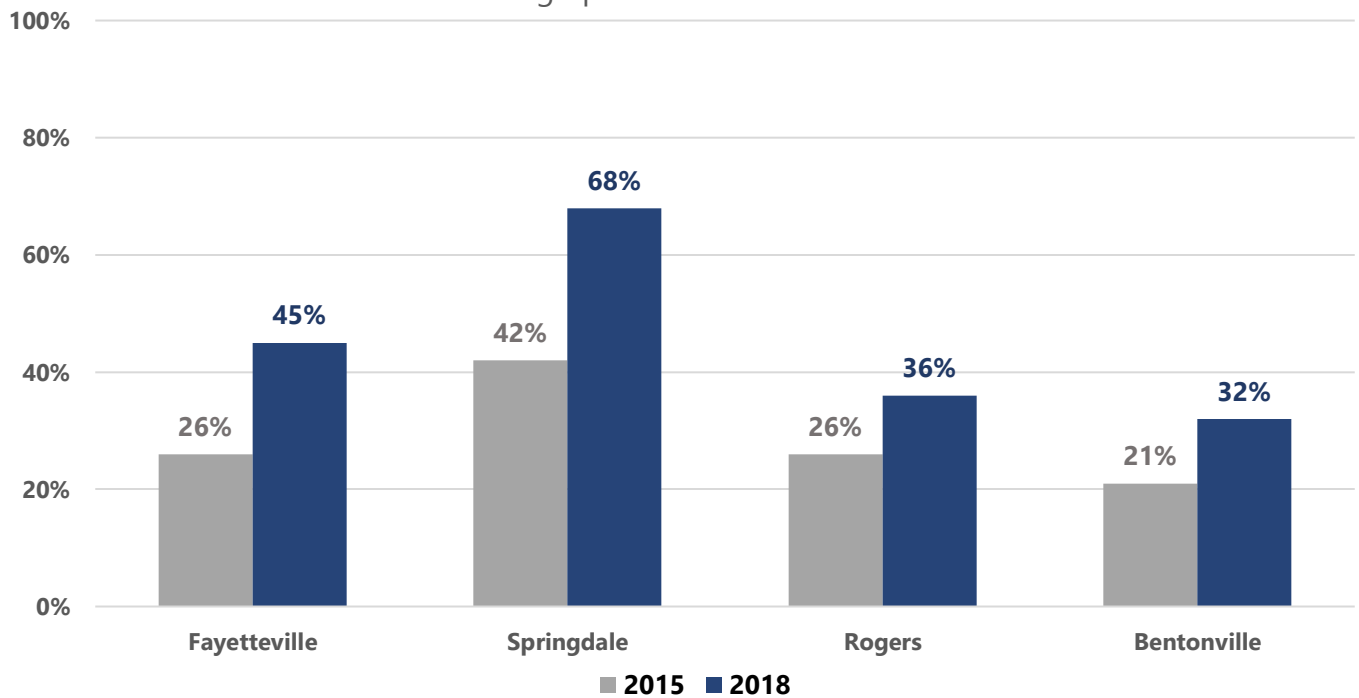


Figure 11: Percentage of Respondents Visiting the Jones Center per Geographic Location

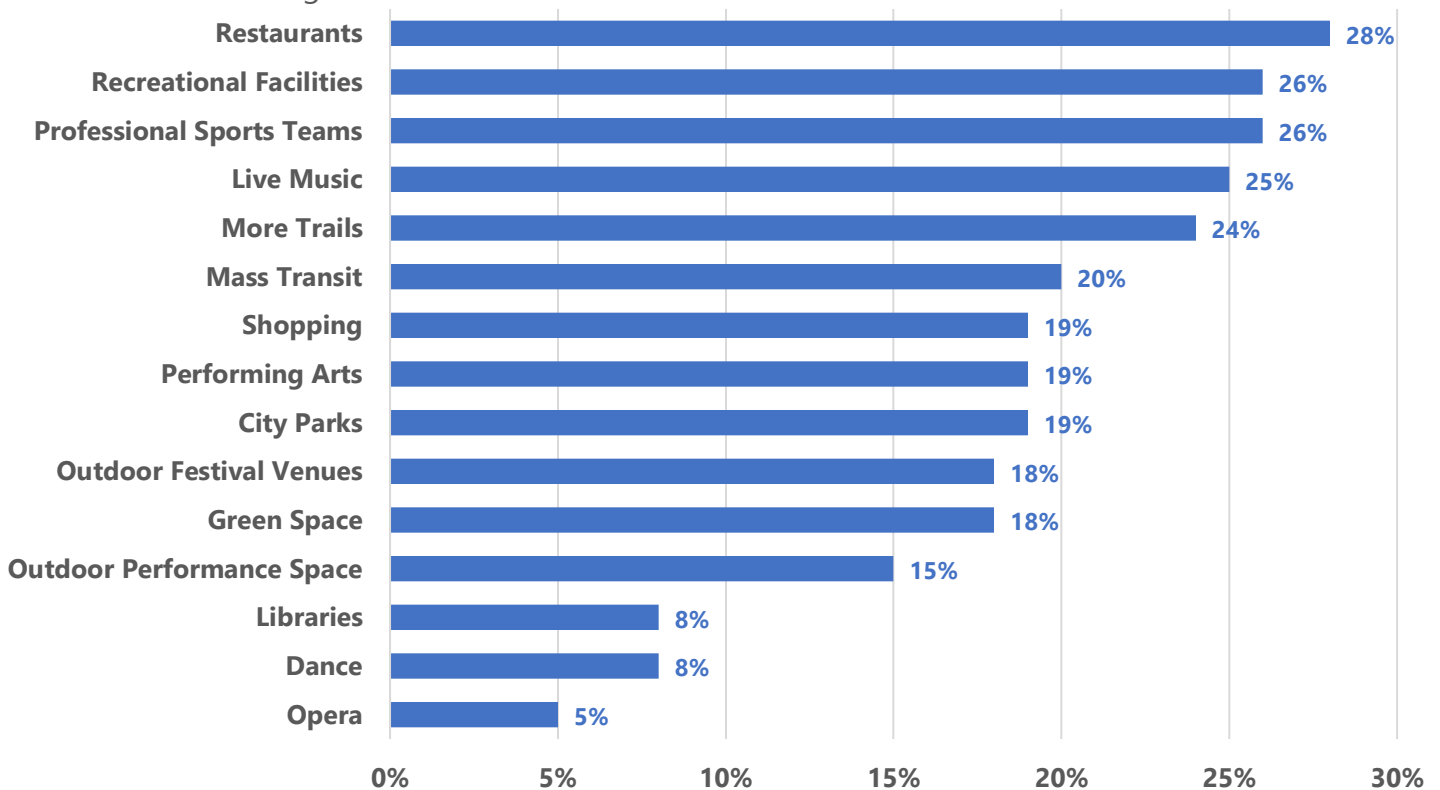


Potential Amenities

The next chart (Figure 12) shows the new amenities most desired by residents in 2018. The most desired amenities, chosen as a top-three amenity by at least 25 percent of respondents, were restaurants, recreational facilities, professional sports teams, and live music. Additional trails (24 percent) and mass transit (20 percent) followed these as the fifth- and sixth-most preferred amenities.

The percentages in Figure 12 are based on asking respondents to choose up to three amenities. In addition, respondents were also asked to choose their one most-preferred amenity from among their top three. When asked to choose their most preferred amenity, respondents' most common preferences were for mass transit (12 percent), restaurants (11 percent), and professional sports teams (11 percent).

Figure 12: Resident Preferences For Additional Amenities, 2018



Implications

High reported attendance rates for foundation amenities indicate these amenities matter to residents across the region. In particular:

- With 71 percent of residents reporting attendance in 2018, Crystal Bridges is easily the most used arts and culture facility, followed by the Walton Arts Center (45 percent).

- Resident income level appears to affect attendance rates for most area amenities, even free amenities such as Crystal Bridges.
- Proximity also appears to matter in terms of frequency of visits. For example, Bentonville and Springdale residents report visiting Crystal Bridges and the Jones Center, respectively, more than residents in other cities.

B. EDUCATION

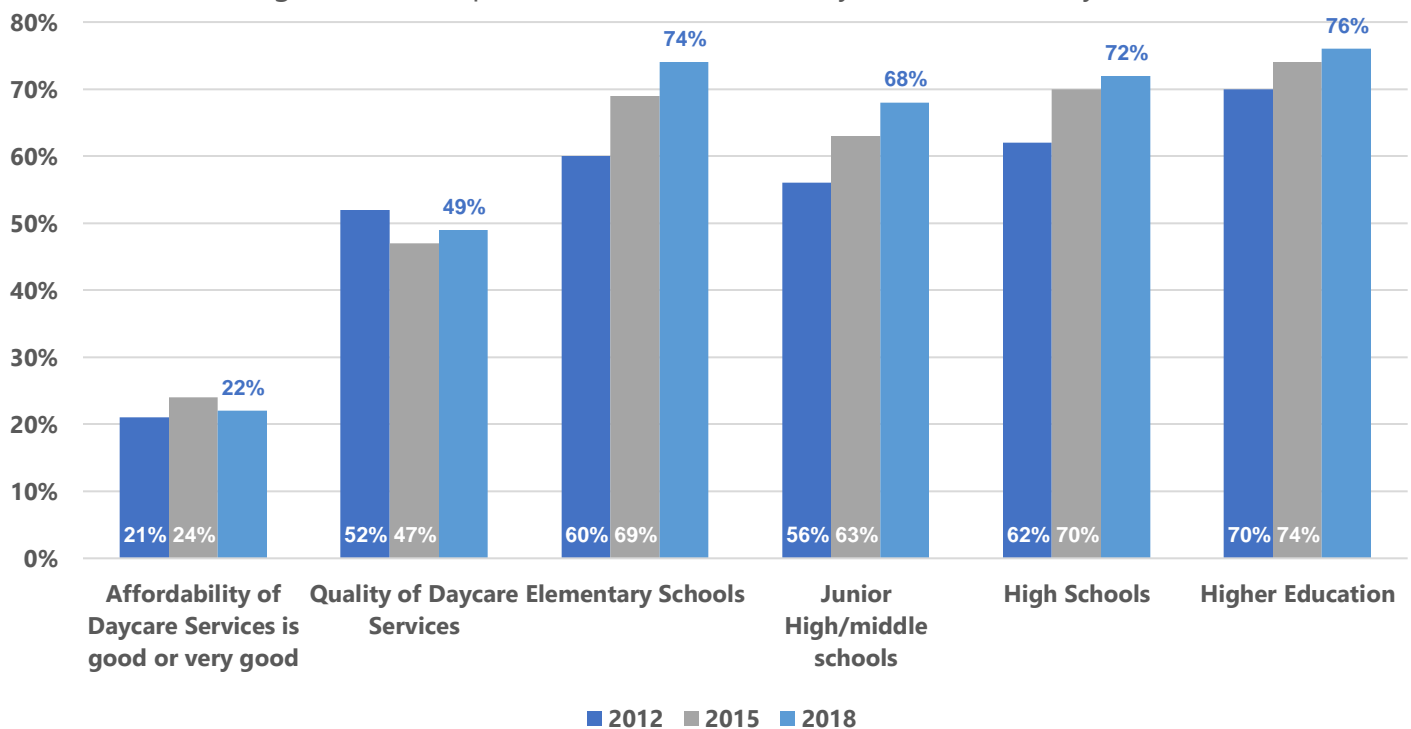
Investments

Grantees include Rogers Public Schools, Helen Walton Children’s Enrichment Center, Arkansas Public School Resource Center, six public charter schools, and one independent school.

Results

Between 68 percent and 76 percent of Northwest Arkansas residents perceive the quality of education (elementary school through higher education) to be good or very good. These numbers are slightly higher than in 2012 and 2015, as shown below in Figure 13. The decrease in residents’ perceptions about the both the quality and affordability of daycare services is not statistically significant.

Figure 13: Perceptions of Education Quality and Affordability



Perceptions of Daycare

Further analyses of the 2018 respondents who thought daycare services were not of high quality revealed no statistically significant differences by respondent income level or city. However, residents who reported having children generally exhibited more positive attitudes towards the quality and affordability of daycare services.

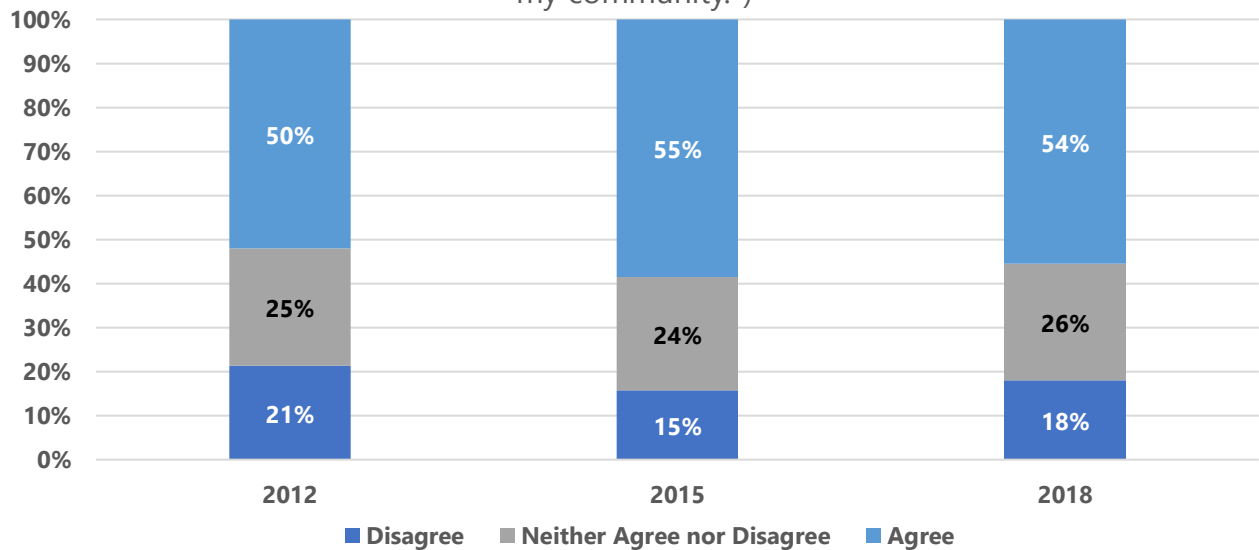
Not surprisingly, low-income residents were much more likely to report that daycare was unaffordable, with 28 percent of respondents with household incomes below \$50,000 rating affordability as “poor” or “very poor”. This same figure was 21 percent for households between \$50,000 and \$100,000, and 14 percent for households earning over \$100,000.

Perceptions of K-12 School Choice

Fifty-four percent of residents agreed or strongly agreed that having more K-12 school options would be good for the community, while 18 percent disagreed and 26 percent neither agreed nor disagreed. These numbers are similar to those from 2015. Interestingly, men were slightly but significantly more supportive of increasing the availability of K-12 school choices than women (56 percent for men; 52 percent for women).

In 2018, as in 2015, Hispanics were more supportive of increasing the availability of school choices (59 percent) than non-Hispanics (53 percent), and whites showed the lowest level of support of any racial or ethnic group (52 percent). Residents of Rogers (63 percent) had the highest level of support for increasing K-12 options, followed by Springdale (55 percent), Fayetteville (53 percent), and Bentonville (52 percent).

Figure 14: Resident Perceptions Around School Choice ("Different K-12 school options, including private schools, would be a good addition to my community.")



Implications

As in 2015, the region's residents widely view local schools as providing a high-quality education. A small percentage (between 3 percent to 5 percent depending on the question) of all residents saw school quality as a serious problem. Another notable finding is that 54 percent of residents also thought more K-12 school options would benefit the community, which is overall consistent with the level of support from 2015 and 2012.

C. SENSE OF PLACE

Investments

Grantees include the NWA Trailblazers, Northwest Arkansas Land Trust, Northwest Arkansas Council Foundation, the Northwest Arkansas Regional Planning Commission, and the cities of Bentonville, Fayetteville, Rogers, and Springdale.

i. Sense of Place: Environment

Results

Most residents (87 percent) believe water pollution is not a problem. In addition, 86 percent of residents believe air pollution is not a problem (91 percent in 2015).

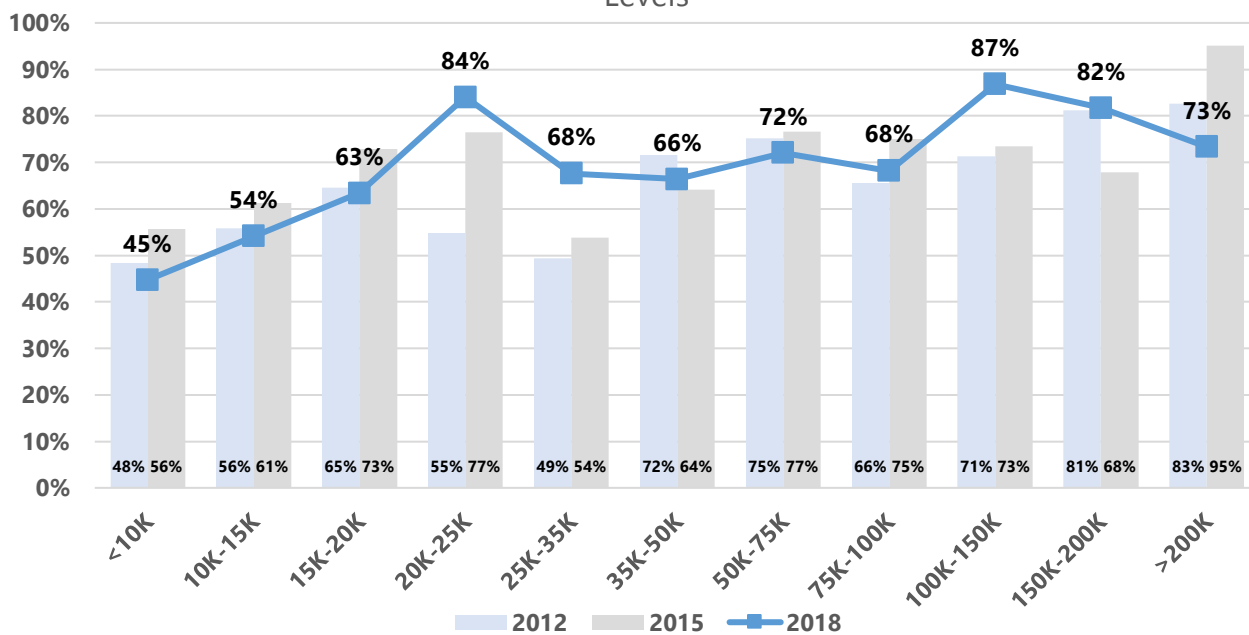
ii. Sense of Place: Trails

Results

Trail usage ranked third among all natural and cultural amenities (behind parks and Crystal Bridges), with 70 percent of residents reporting having accessed a trail at least once in 2018. Trail usage rates differed by city and income. Bentonville (74 percent) and Fayetteville (72 percent) had the highest reported rates of trail use; Rogers was at 68 percent and Springdale at 66 percent. African Americans (90 percent) reported the highest rate of trail use. A significantly higher percentage of residents in Springdale and Rogers reported visiting the trails in 2018 than 2015, while the trail usage rate in Fayetteville was not significantly different from 2015 and in Bentonville (74 percent) trail use was down from a high of 81 percent in 2015.⁷⁸

There was also a difference of trail use when disaggregated by trail type. Forty percent of all respondents reported accessing a paved trail most often, while 22 percent of residents reported accessing a natural-surface trail most often.

Figure 15: Relationship Between Trail Usage Rates and Resident Income Levels



iii. Sense of Place: Mass Transit

⁸ In 2015, Hispanics (72 percent) reported using the trails at higher rates than non-Hispanics (69 percent). This relationship did not hold in 2018: Hispanic trail usage was 60 percent while 72 percent of non-Hispanics reported trail use.

⁹ Rogers: 68% in 2018 vs 61% in 2015. Springdale: 66% in 2018 vs 53% in 2015.

Results

Mass transit was identified as the top desired amenity by 12 percent of residents, with no notable differences among residents of different races and ethnicities.⁹

iv. Sense of Place: Downtown Development

Results

Overall, 36 percent of respondents reported an increase in visits to downtown areas over the last year, while 49 percent reported no change. Respondents were most likely to visit downtowns to dine, shop, and attend the farmers' market. There was not a strong relationship between income and stated reasons for visiting downtowns, with a few notable exceptions. Respondents with income of \$75K-\$100K per year reported dining downtown at higher rates than lower income residents. Wealthier residents also reported visiting the farmers' market more often.

D. COORDINATED ECONOMIC DEVELOPMENT

Investments

The foundation's primary coordinated economic development grantees are the Northwest Arkansas Council Foundation, Startup Junkie Foundation, Endeavor Northwest Arkansas, Arkansas Governor's Cup and the Northwest Arkansas Community College Foundation. The survey questions primarily addressed infrastructure adequacy, including the airport.

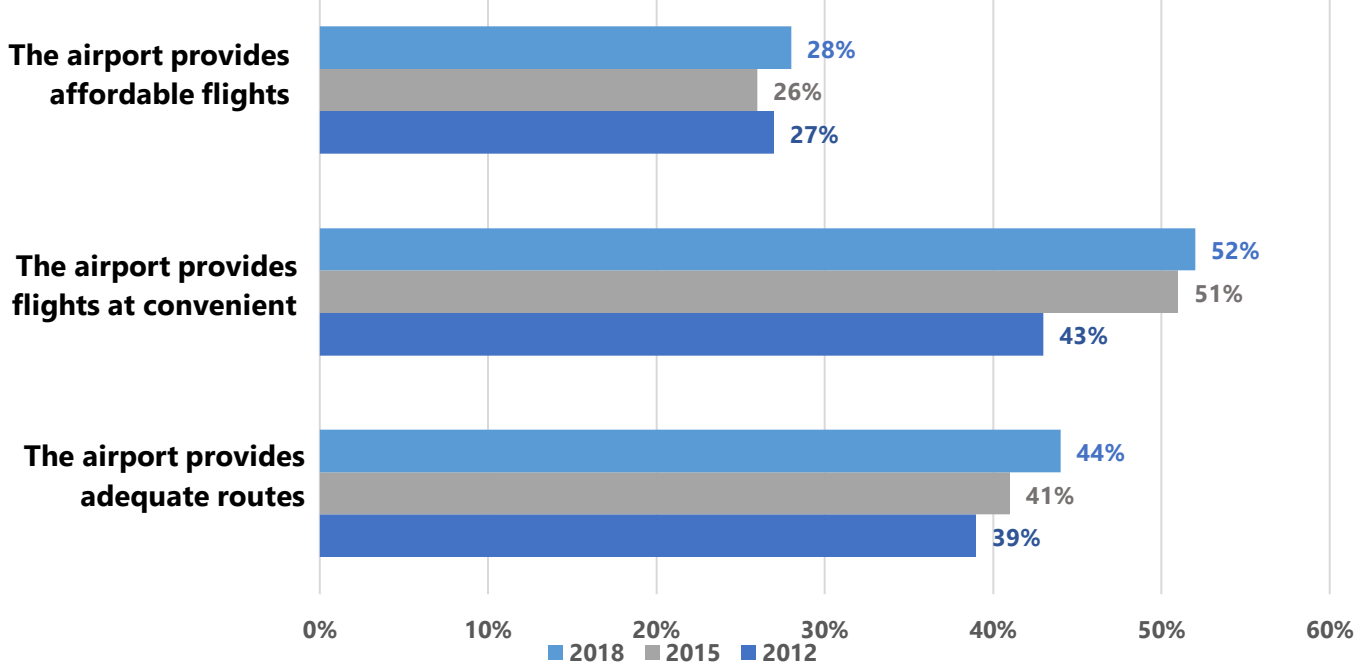
Airport and Airlines

The survey also asked questions about the airport in terms of adequate routes, flights at convenient times, and flight affordability. Residents indicated the following:

- 44 percent of respondents said the airport provides adequate routes, which is up significantly from 39 percent reported in 2012.
- 52 percent said flights were at convenient times, a significant improvement from 2012 (43%).
- Only 28 percent of residents said flights were affordable. This is in line with 2015 (26 percent) and 2012 (27 percent).

¹⁰ Clarification: when asked to indicate their top choice among three preferred possible amenities chosen previously in the survey, 12 percent of residents chose mass transit. This percentage was higher than for any other amenity, though likely not significantly different from reported percentages for restaurants/bars and professional sports.

Figure 16: Perceptions About Airfare Affordability, Route Conveniency, and Airport Capacity (% of Respondents Who Agree or Strongly Agree)



Implications

Residents expressed concerns about dangerous driving in their neighborhoods and affordability of flights to and from Northwest Arkansas (Note: XNA has added a few lower cost flights in months following this survey.) Among six peer regions identified by the Northwest Arkansas Council as economic competitors, Northwest Arkansas had the second greatest share of long commutes (between 45 and 88 minutes).

3. OTHER QUALITY OF LIFE TOPICS

In this section, residents were asked for their perceptions on three issues—crime and safety, community engagement, and health—that are related to quality of life and are often included in similar surveys. These three areas are not currently the primary focus of Walton Family Foundation grantmaking in Northwest Arkansas. These topics were included to see if there were any major issues not in the strategy that were important to residents and that the foundation may wish to address.

A. Crime and Safety

Safety questions explored how safe residents felt in different locations, such as their home, their neighborhood, and their closest downtown area during the day and at night. The survey also included questions about types of crime activity, including graffiti and car theft, and whether residents perceived these as significant problems in the community.

Results

Overall, 98 percent of residents reported feeling safe in a variety of situations (Figure 17). Not surprisingly, men are more likely than women to feel safe walking alone in their neighborhood after dark or in a downtown area after dark. Residents of Springdale reported the smallest percentage of residents who felt safe in their neighborhood after dark (82 percent in 2018; 84 percent in 2015).

The largest crime and safety problem identified by residents was related to dangerous driving. Forty-four percent of residents felt dangerous driving was a problem (Figure 18).

Overall, since 2015, perceptions of crime and safety have shown a modest negative trend. Twenty-seven percent of residents reported concerns with vandalism (up from 21 percent in 2015), 24 percent believed car theft to be a problem in their community (up from 15 percent in 2015), and 46 percent indicated problems in their community related to drugs and alcohol (up from 38 percent in 2015).

Figure 17: Perceptions of Community Safety During Daytime/Nighttime in Home Vs. Downtown

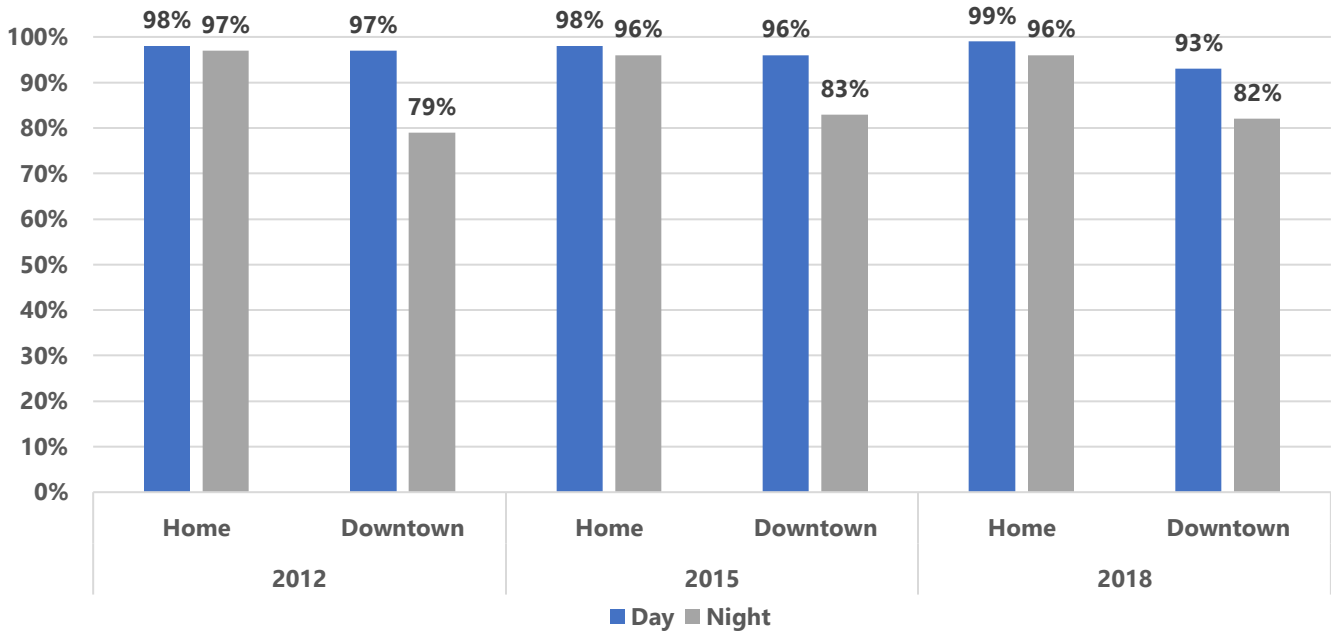
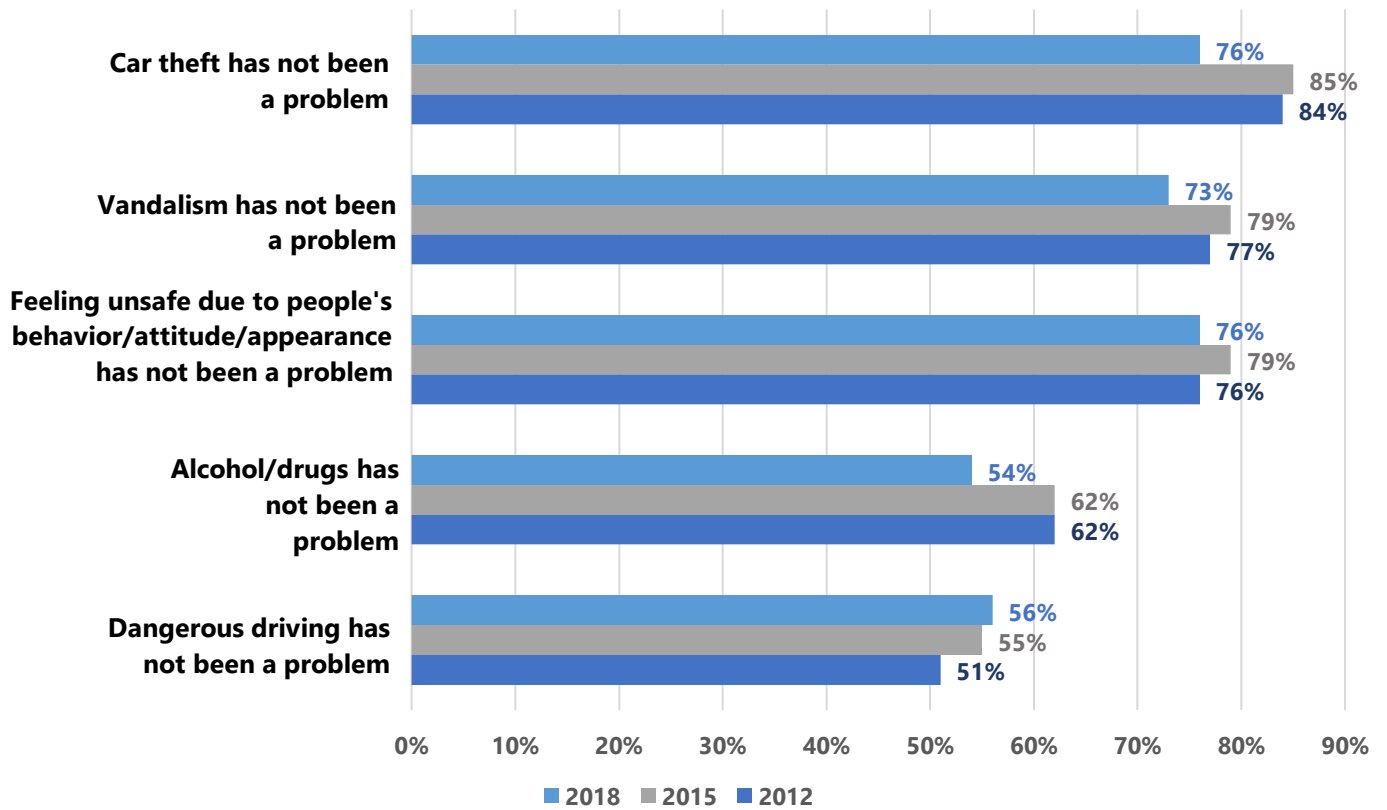


Figure 18: Community Perceptions About Crime



Implications

Northwest Arkansas residents generally do not view crime as a problem, and this perception is consistent with the fact that Northwest Arkansas has relatively low crime rates.

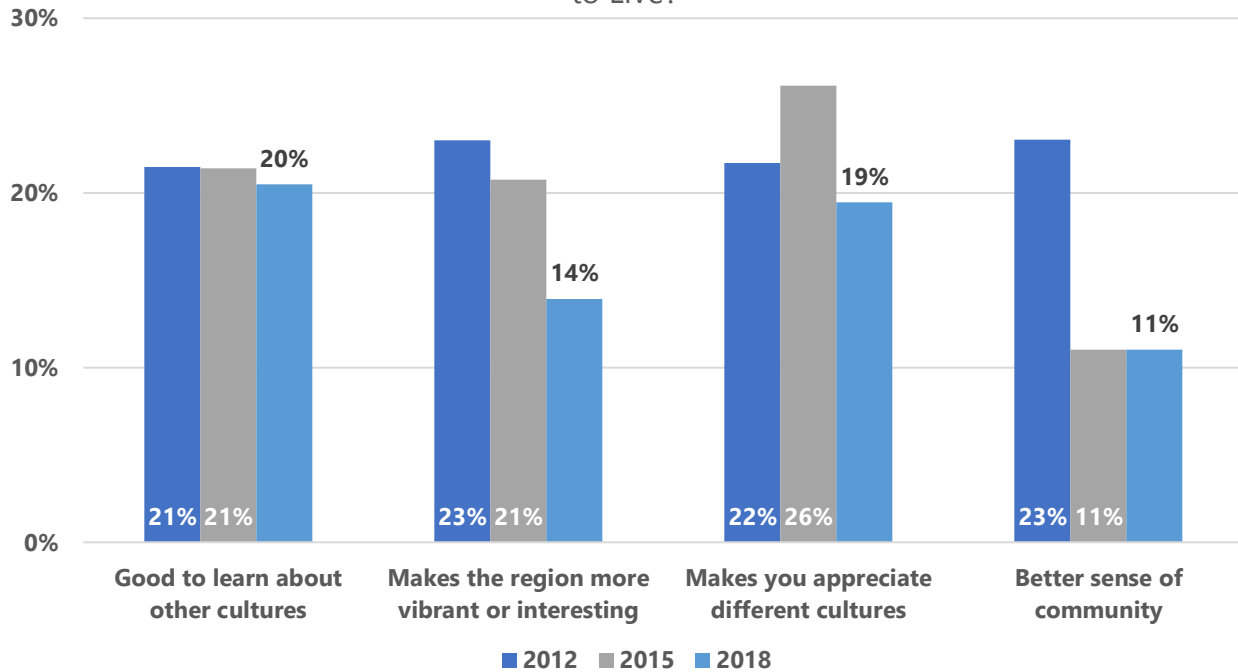
B. Diversity and Inclusion

The Quality of Life survey addressed this topic by asking residents about (1) their feelings of acceptance in their community and (2) their exposure to different lifestyles and cultures and the region's increasing diversity. In 2018, 87 percent of residents said they felt accepted by people in the local community (identical to 2015). In absolute terms, strong majorities of all races and ethnicities reported feeling accepted. However, 26 percent of African American residents did not feel accepted in the community, much higher than levels of non-acceptance for whites (4 percent) and Hispanic (3 percent).

Sixty-four percent of residents appreciated the exposure to different lifestyles and cultures and the region's increasing diversity (60 percent in 2015 and 2012). Residents who agreed that increasing diversity is good for the region were asked why diversity makes the region a better place to live. As shown below in Figure 19, their most common answers were divided among the following:

- "Good to learn about other cultures" (20 percent of pro-diversity respondents)
- "Makes you appreciate different cultures" (19 percent of pro-diversity respondents)
- "Makes the region more vibrant and interesting" (14 percent of pro-diversity respondents)
- "Creates a better sense of community" (11 percent of pro-diversity respondents)

Figure 19: Why Does Diversity Make Northwest Arkansas a Better Place to Live?



Contrary to the 64 percent of residents who see benefits in increased diversity, 9 percent of residents believe diversity makes Northwest Arkansas a worse place to live. This percentage has declined significantly from 15 percent of residents in 2012.

Implications

Sixty-four percent of respondents said that different lifestyles and cultures make Northwest Arkansas a better place to live. These data provide a fairly positive picture of the community’s perceptions of the region’s increasing diversity. The survey does not, however, provide information about people who may choose not to move to the region because of a lack of diversity.

C. Community Engagement

Quality of life surveys typically measure social cohesion by asking questions related to civic engagement. In this survey, residents were asked about their level of volunteer work with charitable, political, and religious organizations, as well as whether they voted in the past 12 months.

i. Voter Participation and Local Government Perception

Results

The region's reported voting rate of 60 percent within the past 12 months is slightly less than the reported national turnout rate in the 2018 midterm elections (62%). The majority of residents (59 percent) also expressed confidence in local government decision-making; this is 7 percentage points higher than the 52 percent reported on the 2015 survey.

ii. Health Care

Health was one of the major influences on respondent perceptions of quality of life. The quality of life survey included several questions related to perceptions of the quality of health care in the region.

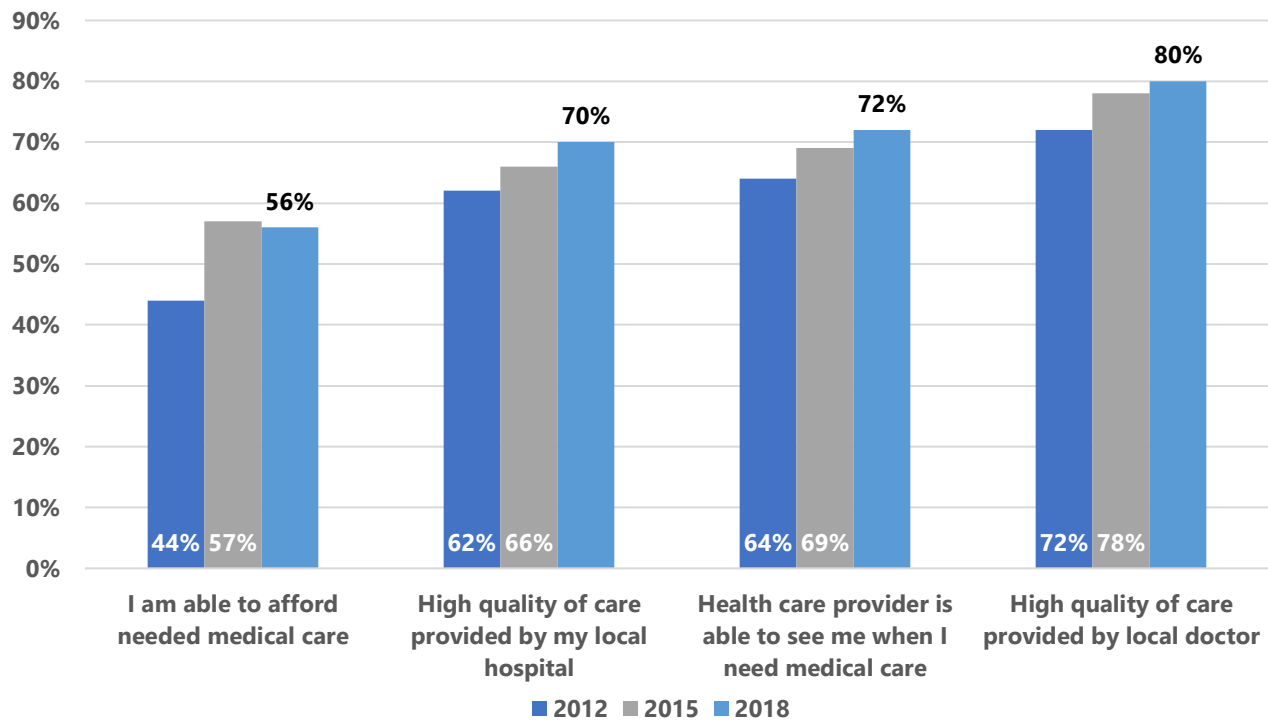
Results

The majority of residents who offered an opinion were satisfied with access to medical care in Northwest Arkansas, as shown below in Figure 20. In 2018, approximately 72 percent of residents (69 percent in 2015) agreed they had good or very good access to their health care provider, 83 percent had good access to medical services for their child locally, and 56 percent had good access to mental health care services. Fewer residents expressed concerns about access to health care in 2018 relative to 2015; approximately 10 percent cited concerns about poor or very poor access to their health care provider and 5 percent about medical services for their child locally. The percentage of residents who perceived having poor access to mental health care services remained at 17 percent among Northwest Arkansas residents (same as in 2015).

Similarly, the majority of all residents were satisfied with the quality of care they received at their local doctor and local hospital. Eighty percent rated the quality of care at their local doctor as good or very good, while 70 percent gave the same rating to quality of care at their local hospital (66 percent in 2015).

Lower income residents reported concerns related to health care (affordability, access, quality, access for children) at higher rates than wealthier residents. Nineteen percent of all residents said that their ability to afford needed medical care was very poor or poor. Compared to 2012, when 31 percent of residents indicated concerns about affordability of medical care, overall concerns about affordability decreased to 18 percent in 2018. Moreover, 83 percent of respondents who reported having children said that access to medical services for their children locally was good or very good.

Figure 20: Perceptions of Health care



Implications

Questions about health care reveal some concerns about access to care. While 80 percent of residents reported positive perceptions about the quality of care they receive from their local doctors and 72 percent reported their health care providers could see them when needed, this nonetheless implies 20-30 percent of residents have concerns about quality and access for health care needs.

As a point of context, the ratio of residents to primary care physicians is lower in Northwest Arkansas than the ratio in peer regions (1:960 compared to 1:596). These ratios appear consistent with the problem of access identified by residents.

4. CONCLUSION

Impact of Foundation Investments

Overall, the rate of positive perceptions about the quality of life in Northwest Arkansas is high and the foundation is playing a key role in contributing to these perceptions. In particular, many amenities the foundation has funded have high usage rates, some of which (e.g., Crystal Bridges) have significantly increased over time.

Limitations/Moving Forward

The Northwest Arkansas Quality of Life Survey was designed to provide a broad overview of residents' perceptions of quality of life in the region, with particular attention to the foundation's four investment strategies. In most cases, the results provide evidence that the foundation's strategic investments are making a difference and showing improvement or holding steady from the 2012 and 2015 surveys. For example, the foundation's strategy was based on a belief that creating and improving access to regional amenities would help make the area a desirable place to live. The fact that residents are using foundation-funded amenities at such high rates and are reporting such high levels of life satisfaction may indicate a relationship between the two.