

Northwest Arkansas  
**Quality of Life  
Survey Report**

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WFF Evaluation Unit

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*February 2016*

WALTON FAMILY  
F O U N D A T I O N



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## EXECUTIVE SUMMARY

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### 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: economic development and infrastructure, arts and cultural amenities, education, and projects that create a 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. WFF has finalized a five-year strategic plan, and family-directed foundation investments in Northwest Arkansas have totaled nearly \$97 million to 51 organizations between January 2013 and January 2016.

### 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 for the first time qualitative measures using the Northwest Arkansas Quality of Life Survey. The survey was commissioned by the WFF Evaluation Unit 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, the Evaluation Unit again commissioned the SRL and Mississippi State University to conduct another survey to determine if the quality of life perceptions of Northwest Arkansas residents had changed over the past three years.

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

### Survey Purpose and Method

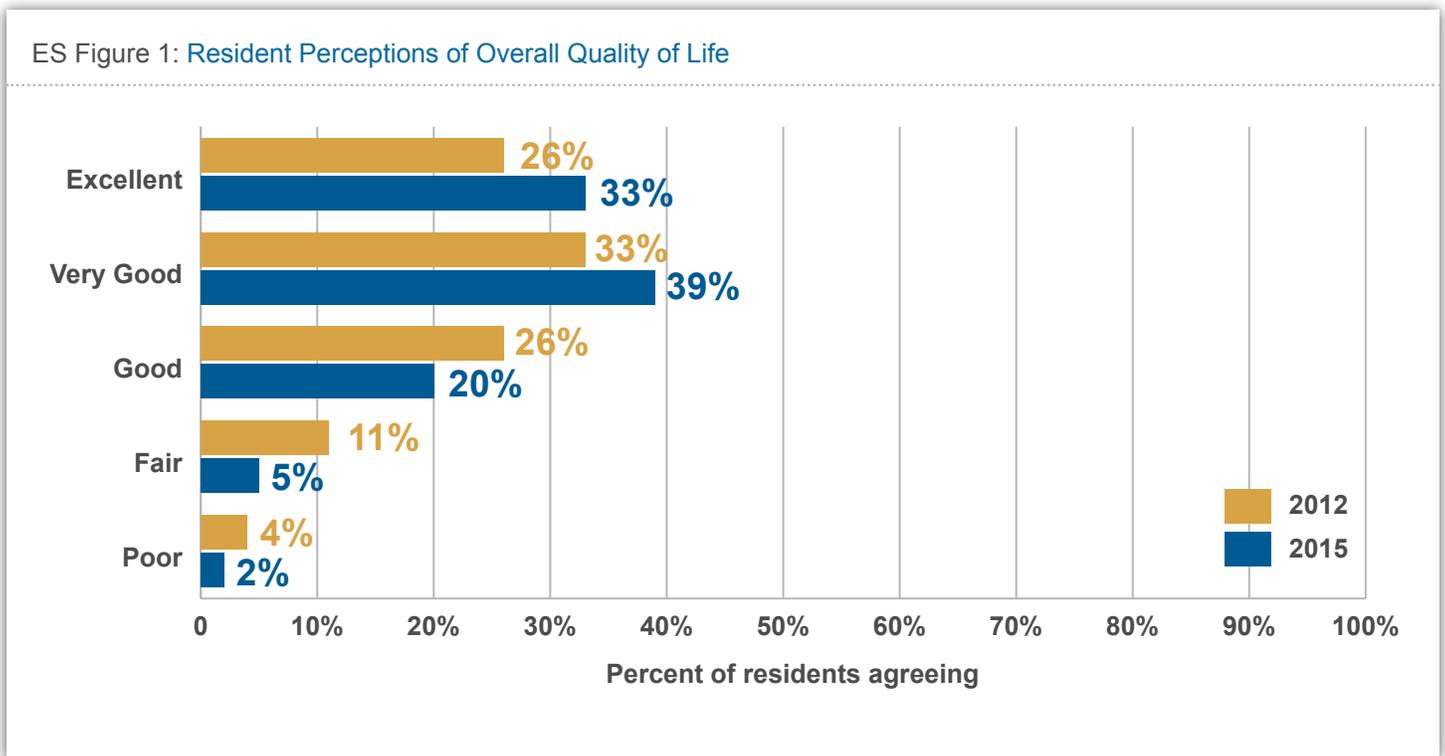
The 2015 Northwest Arkansas Quality of Life Survey has two primary goals:

- 1) To evaluate the impact of foundation giving in the Northwest Arkansas community by tracking changes over time; and
- 2) To inform strategic decisions about future grant making.

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

SRL surveyed a representative sample of 1,035 residents in Benton and Washington counties between the ages of 20 and 64; there were 99 survey questions.

## KEY FINDINGS: Overall Quality of Life



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

- » **95 percent** of residents reported being “very happy” or “fairly happy” (94 percent in 2012)
- » **72 percent** of residents rated their overall quality of life as “excellent” or “very good” (59 percent in 2012)
- » **48 percent** said that their overall quality of life has “significantly increased” or “increased” over the past year (38 percent in 2012)

Common themes about what most influences quality of life were family, finances, and health, while family and finances were consistent from 2012, health was a new theme in 2015 replacing jobs. This change could be due to the bounce back from the recession as NWA has an unemployment rate of 4.5 percent (below the national average).

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 impacting positive perceptions of life in the region.

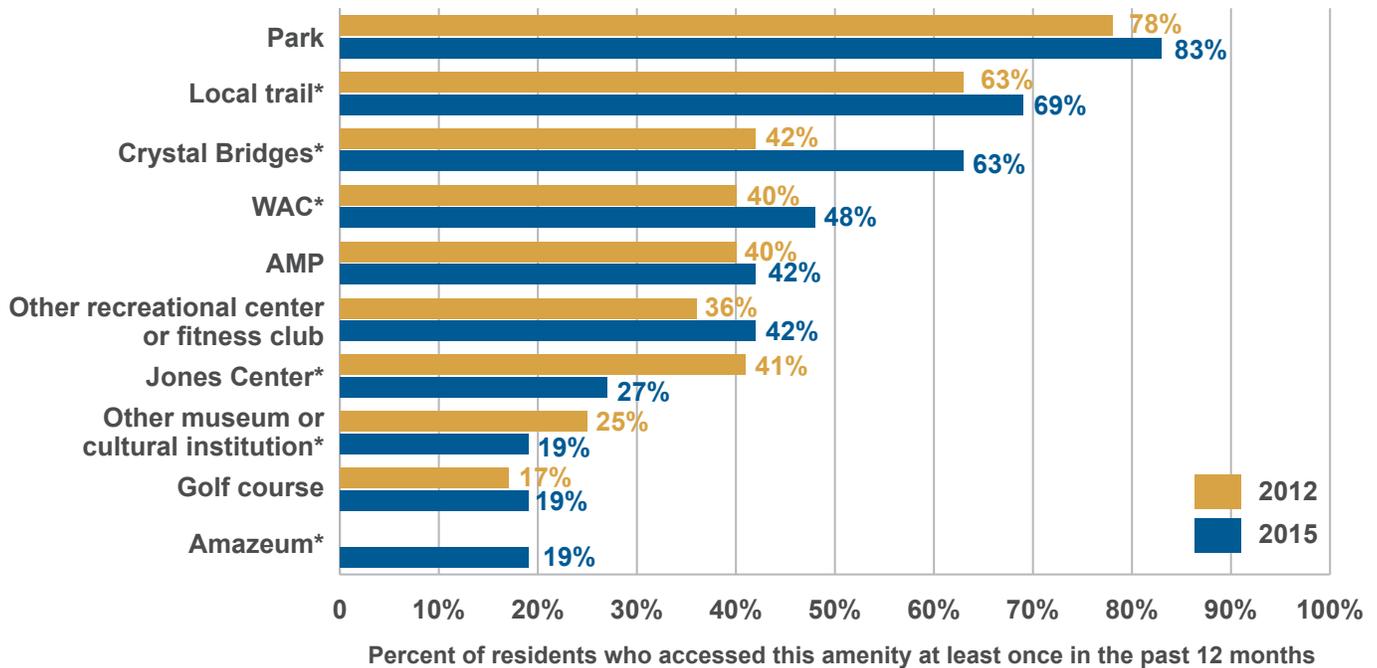
<sup>1</sup> In the 2012 survey, the “good” response category was included as well in reporting survey results for this question, which accounted for the 85 percent figure that year. If this response were also included in the 2015 results summary for this question, the comparable figure would be 92 percent. The change in this year’s reporting is to be consistent across all questions that are on a 1-5 scale. When percent agreement is given in this report, it is the sum of responses “4” and “5” for each question.

## KEY FINDINGS: WFF Family-Directed Investment Areas

### Arts and Cultural Amenities

WFF's family-directed arts and cultural amenity investments from January 2013 to January 2016 were \$15.7 million to 10 organizations. Grantees include the Walton Arts Center, TheatreSquared, and the Symphony of Northwest Arkansas.

ES Figure 2: Reported Amenity Usage Rates by Residents: High Levels of Amenity Usage



\*Starred amenities have been a focus of WFF funding. In 2012, WAC and AMP were combined. They were separated in 2015 survey.

Amenities funded by the foundation were used by between 27 percent and 69 percent of residents during the past 12 months.

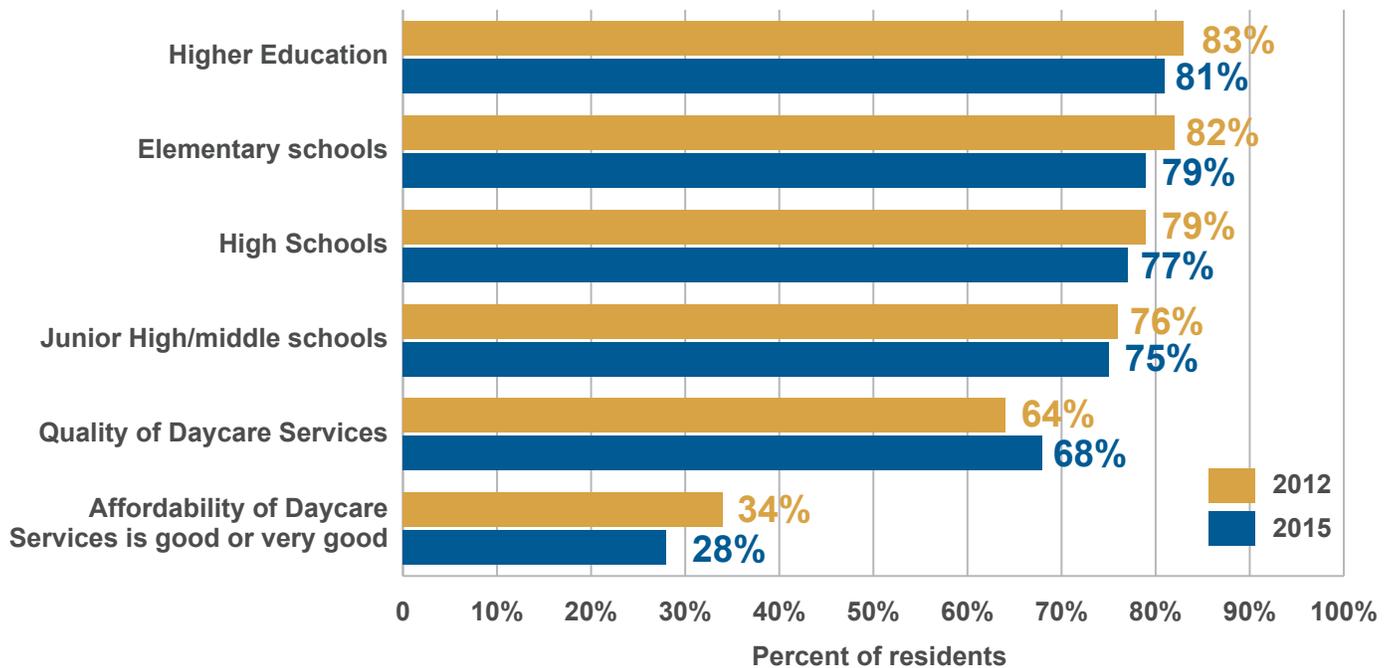
- » There was a large overall increase (21 percentage points) in resident attendance at Crystal Bridges, and all races saw increases as well. There remained a linear relationship between visits and income for the Walton Arts Center and Crystal Bridges. This means usage rates increased with resident incomes—i.e., wealthier residents are more likely to use these amenities, even when the amenity is free. This same relationship was also noted in 2012.
- » Proximity also appeared to play a role in whether residents used a particular amenity. For example, Bentonville residents were more likely to visit Crystal Bridges, and Springdale residents were more likely to visit the Jones Center. However, all amenities were used by significant percentages of residents in all the metro areas.

The survey also asked residents about which services and amenities they would like to see more of in Northwest Arkansas. The top three responses were: professional sports team (34 percent), mass transit (29 percent), and outdoor festival venue (26 percent).

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

Foundation Home Region education grantees include Arkansas Advanced Initiative for Math and Science, Helen Walton Children’s Enrichment Center, Arkansas Public School Resource Center, six public charter schools, and one private school. Overall, investments between January 2013 and January 2016 were \$20.3 million to 14 organizations.

ES Figure 3: Resident Perceptions<sup>2</sup> of Educational Quality and Pre-K Affordability in NWA: Relatively High Satisfaction Rates, with the Exception of Pre-K<sup>3</sup>



Overall, 75 percent to 81 percent of those responding perceived the quality of elementary school through higher education to be of good or very good quality. 68 percent perceived Pre-K offerings in the region as high quality, but only 28 percent believed Pre-K to be affordable.

In addition, 56 percent of residents thought more school choice would improve their community, an increase from 50 percent in 2012. Twenty-four percent neither strongly agreed nor disagreed, and 15 percent disagreed or strongly disagreed, a decrease from 21 percent in 2012. (five percent had no opinion or refused to answer)<sup>4</sup>.

<sup>2</sup> For questions where the response rate was lower than 90 percent, we report the percentages of agreement of those who offered an opinion. This approach differs from how we calculated percentages of agreement in the 2012 survey. For example, if we were to calculate the satisfaction rate related to quality of daycare using all individuals surveyed, the 2012 rate would have been 52 percent (which was reported in 2012), but when we calculate the satisfaction rate using only those with an opinion, the 2012 rate would have been 64 percent.

<sup>3</sup> Pre-K was phrased as “daycare” on the survey and is used interchangeably.

<sup>4</sup> Not all percentages will add to 100 percent. In some instances, this is due to rounding; in other cases, it is due to the fact that some survey participants refused to answer or answered that they “did not know”.

## Sense of Place

Grantees include the Bentonville Bella Vista Trailblazers Association, Northwest Arkansas Council Foundation, the Northwest Arkansas Regional Planning Commission, and the cities of Bentonville, Fayetteville, Rogers, and Springdale. From January 2013 through January 2016, the foundation invested \$35.7 million in 20 organizations.

In 2015, 87 percent of residents said they felt accepted by people in the local community (85 percent in 2012). Although there was a statistically significant difference by race, all races reported relatively high levels of acceptance. The two groups with lower perceptions of acceptance were African Americans at 79 percent and American Indians at 64 percent (versus whites at 88 percent).

As in 2012, when analyzing perceptions of acceptance by income level, we find that the only group of respondents feeling a lack of acceptance in the community was lower income residents. That said, 71 percent of lower income residents still reported feeling accepted.

In addition, 60 percent of respondents said that different lifestyles and cultures make Northwest Arkansas a better place to live, which is consistent with 2012 figures.

### » Environment

Eighty-nine percent of respondents believe water pollution is not a problem, up from 85 percent in 2012. In addition, 91 percent of respondents believe air pollution is not a problem, which is again an improvement from 2012 (86 percent).

### » Trails

Overall, trail usage rates were high as 69 percent of residents reported using the trails; an increase from 63 percent in 2012. Trail usage was only second to park usage among all amenities (both natural and cultural). While wealthier residents were typically more likely to report using the local trail system, there were high rates of trail use reported among all income levels. The lowest rate of trail usage by income category was 55 percent, and the highest rate was 96 percent. There was also a difference in reported trail use based on metro area. Bentonville (81 percent) and Fayetteville (71 percent) had the highest reported trail use, with Rogers at 61 percent and Springdale at 53 percent.

### » Downtown Development

Overall, 34 percent of respondents reported an increase in visits to downtown areas over the past year, while 51 percent reported no change. Respondents were most likely to visit downtowns to dine, shop, and visit the farmers market.<sup>5</sup>

Only a few reported behaviors in downtowns had a strong relationship to income. Respondents in income categories of \$75K per year and higher were far more likely to report dining in the downtowns, going to the farmers market, and seeking entertainment than lower income residents.

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<sup>5</sup> Questions related to downtown visits and activities were not a part of the 2012 survey.

## Economic Development and Infrastructure

The foundation's two primary economic development and infrastructure grantees are the Northwest Arkansas Council Foundation and the Northwest Arkansas Community College Foundation. Investments to seven organizations over three years totaled \$25.7 million.

Regarding the airport and flights

- » Only 41 percent of residents said that the airport provides adequate routes, which is down from the 49 percent reported in 2012. Twenty-two percent neither agreed nor disagreed, and 18 percent disagreed.
- » Only 26 percent said flights were affordable (27 percent in 2012), 21 percent neither agreed nor disagreed, and 35 percent disagreed.
- » 52 percent said flights were at convenient times, an improvement from 43 percent in 2012. Nineteen percent neither agreed nor disagreed, and 11 percent disagreed. (Fayetteville residents were more likely to say that flights were at inconvenient times.)

## KEY FINDINGS: Other Quality of Life Areas Not Funded By WFF

### Crime and Safety

Northwest Arkansas residents generally do not view crime as a problem, with over 96 percent reporting feeling safe at home, in their neighborhoods, and in downtown areas during the day. This perception is consistent with the fact that Northwest Arkansas actually has relatively low crime rates. In 2013, the Fayetteville-Springdale-Rogers MSA had 334.6 violent crimes per 100,000 population, the lowest of all Northwest Arkansas Council peer regions, the state (399.9/100,000 residents), and the nation (369.1/100,000 residents). The only issue was dangerous driving, with 44 percent citing it as a problem in their community. Additionally, for the 13 percent of residents who reported NWA to be a worse place to live than a year ago, crime and gang activity were a common theme<sup>6</sup>.

### Civic Engagement

Overall, community engagement in Northwest Arkansas is comparable to, and in some cases exceeds, national averages. For example, the region's voting rate (47 percent) exceeds the national rate (36 percent) by eleven percentage points. Additionally, the degree of confidence that local government makes decisions in the best interest of the community continued to have a slight majority of agreement – 52 percent in 2015 (53 percent in 2012).

### Health Care

The majority of residents who offered an opinion are satisfied with access to medical care in Northwest Arkansas. Seventy-two percent agree they have good or very good access to their health care provider, 82 percent to medical services for their child locally, and 65 percent to mental health care services. There are, however, still some residents who have serious concerns about access. Ten percent note they have poor or very poor access to their health care provider, seven percent to medical services for their child locally, and 17 percent to mental health care services

Similarly, the majority of all residents are satisfied with the quality of care they receive at their local doctor and local hospital. Seventy-eight percent rate the quality of care at their local doctor as good or very good, and 66 percent do so for their local hospital. Some residents had concerns, particularly related to quality of care at the local hospital, where 10 percent rate that as poor or very poor.

Perhaps surprisingly, when considering the relationship between income level and issues related to healthcare (affordability, access, quality, access for kids), the only linear relationship that emerged concerned affordability.

Also of note, 19 percent of residents said they were not able to afford needed medical care, down 12 percentage points from 2012.

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<sup>6</sup> Violent crime and gang activity accounted for 11 percent of responses among those reporting NWA to be a worse place to live. Other prominent themes were "too many undocumented immigrants," "difficult communication," and "not enough jobs."

## Impact of WFF 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 is playing a key role in contributing to positive perceptions about life in the region. With high usage rates of foundation-funded amenities (between 27 percent and 69 percent), these investments made by the foundation appear valued by local residents.

The quality of life survey was meant to inform strategic decision making moving forward. Based on the results, the following key questions are important considerations for future strategic plans:

Overall QOL	
Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» Northwest Arkansans are happy (95 percent) and think they have a high quality of life (72 percent would rate quality of life as excellent or very good) (48 percent reported an increase in quality of life from last year)</li> <li>» Top factors driving quality of life are family/friends (20 percent) and health and finances both at (12 percent)</li> </ul>	<ol style="list-style-type: none"> <li>1) The foundation is playing a key role in contributing to positive perceptions about life in the region. What are the investments most likely to maintain or increase this perception?</li> </ol>

Amenities	
Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» Amenity usage appears high</li> <li>» Foundation amenities among the most popular (27 to 69 percent used WFF-funded amenities)</li> <li>» 21 percentage point increase in attendance rate at Crystal Bridges; All races saw increases as well. Hispanic attendance rate at Crystal Bridges increased 32 percentage points (from 30% in 2012 to 62% in 2015)</li> <li>» Use of amenities is affected by income and proximity</li> </ul>	<ol style="list-style-type: none"> <li>1) There has been a significant increase in attendance rates at Crystal Bridges, for all races and among Hispanic residents. However, this usage rate is impacted by income (a similar pattern was seen for WAC). Is the foundation interested in increasing usage rates among the lower income brackets?</li> </ol>

## Education

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» Of those responding 68 percent think Pre-K is high-quality; only 28 percent think it is affordable</li> <li>» Overall, 75 percent to 81 percent of those responding perceived the quality of elementary school through higher education to be of good or very good quality</li> <li>» 56 percent support school choice up from 50 percent in 2012</li> </ul>	<ol style="list-style-type: none"> <li>1) WFF has funded the Helen R. Walton Children’s Enrichment Center to train other daycare centers, but does the foundation want to do more to impact Pre-K quality?</li> <li>2) Is Pre-K affordability a concern for the foundation?</li> <li>3) Public opinion appears high enough to support a more aggressive campaign for additional school choice options in Northwest Arkansas; does the foundation have appetite to address this more aggressively?</li> </ol>

## Sense of Place

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» 87 percent of respondents felt accepted by people in the local community; small increase from 85 percent in 2012</li> <li>» 60 percent of respondents said different lifestyles and cultures and the region’s increasing diversity make NWA a better place to live, same as 2012</li> </ul>	<ol style="list-style-type: none"> <li>1) Given the relatively low levels of racial tension and discord, what types and amounts of diversity and inclusion investments make most sense, if any?</li> <li>2) Most residents feel accepted, including 71 percent of lowest income residents. Is there an interest in addressing the perceptions of inclusion of approximately 30 percent of the lowest income resident category?</li> </ol>

## Sense of Place: Environment

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» 91 percent do not think air pollution is a problem</li> <li>» 89 percent do not think water pollution is a problem</li> </ul>	<ol style="list-style-type: none"> <li>1) Should the fact that water quality is not a concern for most residents influence the foundation’s strategy? If so, how?</li> </ol>

## Sense of Place: Trails

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» 69 percent said they used the trails in the past year (up from 63 in 2012). 94 percent reported using the trails primarily for recreation. Three percent reported commuting as their primary use of the trail system.</li> <li>» There were differences in trail usage by metro area: Bentonville (81 percent); Fayetteville (71 percent); Rogers (61 percent); and Springdale (53 percent).</li> </ul>	<ol style="list-style-type: none"> <li>1) Overall trail use is high and increasing. Does the foundation want to take strategic and/or programmatic steps to encourage commuting by trails?</li> <li>2) Does the foundation want to think about ways to increase trail usage in certain geographies?</li> </ol>

## Sense of Place: Downtown

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» 34 percent reported an increase in visits to downtown over the last year. While 51 percent reported no change.</li> <li>» The use of farmers markets and downtown dining was higher for wealthier residents. The use of downtowns for other purposes did not differ by income category.</li> </ul>	<ol style="list-style-type: none"> <li>1) What role does the foundation want to play in driving a greater percent of the low-income populations to the downtowns and to ensure there are affordable options?</li> <li>2) Does the foundation have an interest in encouraging healthy eating habits amongst the low-income population by making it easier for low-income folks to use the farmers markets?</li> </ol>

## Sense of Place: Economic Development and Infrastructure

Resident Perceptions	Implications
<ul style="list-style-type: none"> <li>» Only 26 percent said flights from NWA are affordable; only 41 percent said airport had adequate routes (8 percentage point decrease from 2012)</li> <li>» When asked which services and amenities they would like to see more of in Northwest Arkansas, residents cited mass transit as the second most desired new amenity, with 29 percent agreeing.</li> </ul>	<ol style="list-style-type: none"> <li>1) What role, if any, should the foundation play in reducing the cost of air travel out of XNA?</li> <li>2) WFF has funded the work of the NWA Council to expand highway infrastructure and create signage to the airport, but is the foundation interested in doing more to address traffic?</li> <li>3) What, if any, role should the foundation play in mass transit initiatives?</li> </ol>

## Crime/Safety

Resident Perceptions	Implications
<ul style="list-style-type: none"><li>» During the day, 98 percent feel safe at home, and 96 percent in downtown. After dark 96 percent of residents feel safe at home and 83 percent in downtown.</li><li>» Crime is not seen as a problem by the vast majority of residents.</li><li>» Dangerous driving is an issue for 44 percent</li></ul>	<ol style="list-style-type: none"><li>1) The largest crime/safety issue noted by residents is dangerous driving. Is dangerous driving an issue the foundation has any interest in addressing?</li></ol>

## Civic Engagement

Resident Perceptions	Implications
<ul style="list-style-type: none"><li>» Voter participation rates are higher than national averages (47 percent voted in NWA)</li></ul>	<ol style="list-style-type: none"><li>1) Civic engagement indicators are similar to national rates. Is there any desire for the foundation to work to promote even higher levels of civic engagement?</li></ol>

## Healthcare

Resident Perceptions	Implications
<ul style="list-style-type: none"><li>» Most residents with an opinion believe they have good access to medical care, both at hospital and with doctor. 17 percent note problems with access to mental health services.</li><li>» The majority of all residents also are satisfied with the quality of local health care</li><li>» 19 percent say they are unable to afford needed medical care; a significant improvement from 2012 (31 percent)</li></ul>	<ol style="list-style-type: none"><li>1) Access to mental health care services was highlighted as an issue. Is the foundation interested in funding services in this area?</li></ol>

## 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 investment strategies. In most cases, the results validate the foundation's strategic investments and showcase improved perceptions of the residents.

Staff proposes that the foundation continues to conduct a quality of life poll every two to three years, using an almost identical script in order to continue to track resident perceptions over time. The survey provides unique data and has value to the foundation as well as to grantees who work in the foundation's investment areas.

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## INTRODUCTION AND SURVEY OVERVIEW

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### 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.

### Defining and Measuring Quality of Life

To measure quality of life for Northwest Arkansas residents, we must first define the concept. The definitions and the indicators used 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, we had not previously collected related qualitative measures in a systematic way prior to 2012. The 2012 and 2015 Northwest Arkansas Quality of Life Survey, commissioned by the WFF Evaluation Unit, is designed to fill that gap by gauging the extent to which residents view Northwest Arkansas as "a great place to live."

We have defined Northwest Arkansas as Benton and Washington counties for this survey, since this is the region that is the focus of the foundation's investments.

### Survey Purpose

The 2015 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 grant making.

To accomplish these goals, we asked residents 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.

## Survey Administration and Content

In August 2012 and September 2015, the WFF Evaluation Unit partnered with the Mississippi State University Survey Research Laboratory (SRL) to administer a telephone survey to a representative sample of 1035 (815 in 2012) working-age Benton and Washington counties residents (ages 20-64). The survey script was developed in collaboration with foundation staff and included 99 questions (82 content questions; 17 demographic/context questions) as follows:

Table 1: Survey Content

Category	Number of Questions	Sample Questions
Overall perceptions of quality of life	25	Overall, how would you rate your quality of life? Would you say...? (Excellent, Very Good, Good, Fair, Poor, Don't Know)
Explore resident perceptions of their satisfaction in the four strategy areas in which the foundation directly invests	37	Different K-12 school options, including private 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 domestic and international quality of life research	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) international quality of life surveys ask different questions or ask questions about similar themes in different ways. Benchmarking these surveys responses to other U.S. locations would require conducting additional surveys in select regions.

Both landline and cellphone users were contacted, and interviews lasted approximately eight minutes. The reported cooperation rate was 84 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 Cultural Amenities
  - NWA Education – World-Class System of Schools
  - Sense of Place
    - Water quality
    - Preservation of green space
    - Trails
    - Downtown
  - Economic Development and Infrastructure
3. Other quality of life topics
  - Crime and Safety
  - Diversity
  - 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. Finally, each section concludes with a discussion of implications based on the findings.

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## 1. GENERAL PERCEPTIONS ABOUT OVERALL QUALITY OF LIFE

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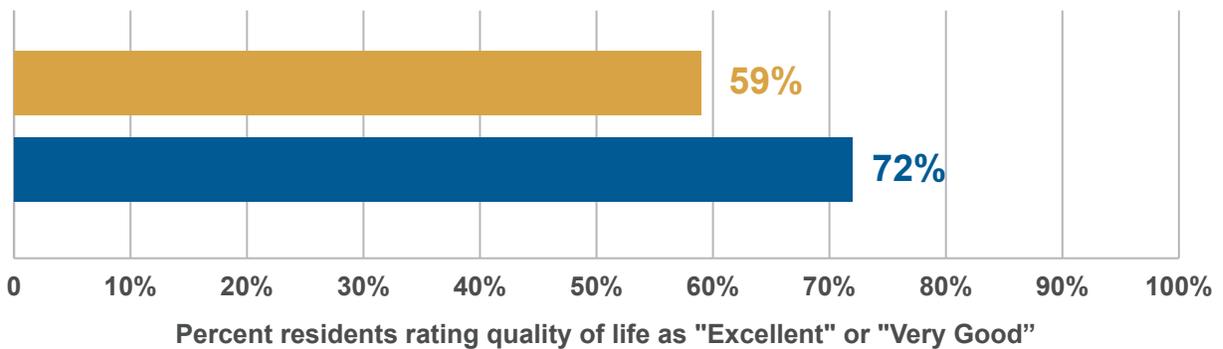
### Foundation Investments

The Home Region Program recently finalized a five-year strategic plan (2015-2020) that outlines the strategies and initiatives covered in the quality of life survey. From January 2013 through January 2016, the foundation invested \$97 million in 51 organizations in Northwest Arkansas through the family-directed budget administered by the Home Region Program.

### Results

In general, Northwest Arkansans report being happy and think they have a high quality of life. Three questions focused on how happy residents were with life overall, how they would rate their quality of life, whether they consider themselves happy and whether they felt their quality of life had improved in the past year.

Figure 1: Resident Perceptions of Overall Quality of Life



## 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; health was a new theme in 2015 replacing jobs. This change could be related to the bounce back from the recession as NWA has an unemployment rate of 4.5 percent (below the national average). 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 NWA

Most important influences on quality of life (n=1035 or 100% of the sample)	Why people moved to NWA in the last five years (n=130 or 13% of the sample)
Family and friends (20%) Health (12%) Finances (12%) Job (9%)	Job, salary, career (36%) Friends and family (23%) Good place to live (4%)

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

**1. Quality of Life Changes in the Past 12 Months:**

Only nine percent of residents said that their quality of life had decreased in the past 12 months. This is nearly half of the 16 percent who reported a decrease in quality of life in 2012.

**2. Not Enough Money to Meet Basic Needs:**

Fourteen percent said they did not have enough money to meet their everyday needs. This is a 10 percentage point improvement from 2012.

**3. Those Planning to Leave:**

When asked if they planned to leave Northwest Arkansas in the next five years, 78 percent said “no” (76 percent in 2012). Of the 18 percent who said “yes”, the top three reasons identified for leaving were: 1) job, salary (28 percent); 2) friends and family live elsewhere (17 percent); and 3) quality of schools (six percent in 2015; 15 percent in 2012). A comparison of the two groups on relevant characteristics is in Table 4 below. The figures indicate that, on average, people planning to stay are older, have lived in the area longer, and have higher incomes. To provide additional context, net migration to Northwest Arkansas over the past three years was 9,392 people or an increase of two percent.

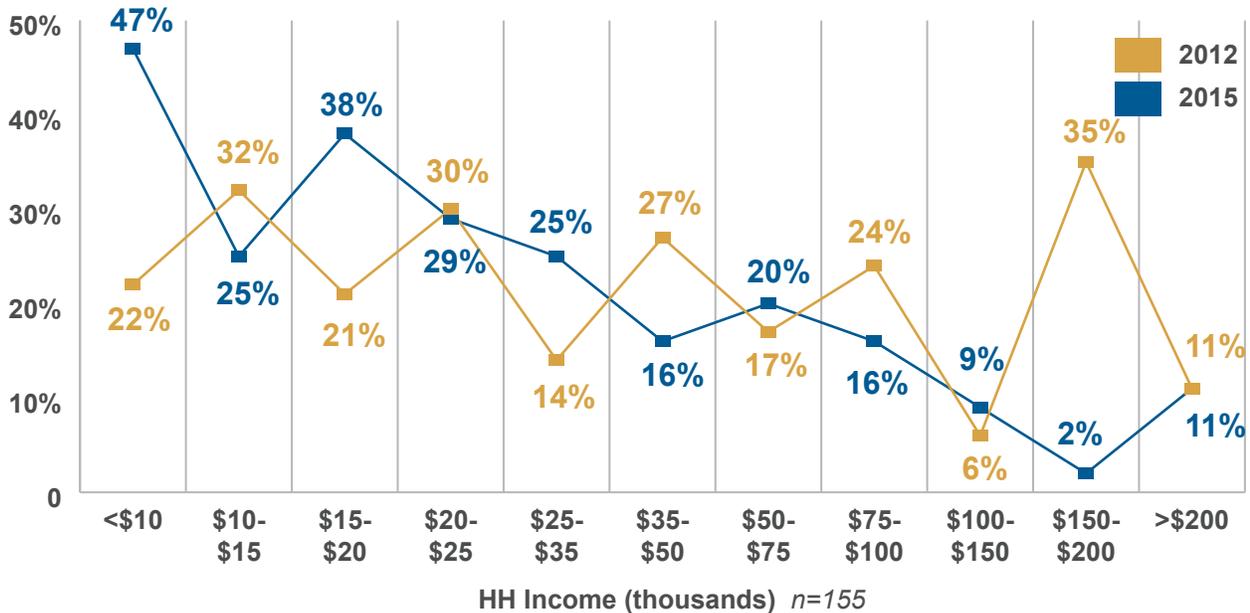
Table 3: Comparison of Characteristics of NWA Residents Planning to Leave in the Next 5 Years and Those Who Plan to Stay

	Those Who Plan to Stay (78%, n=803)	Those Who Plan to Leave (18%, n=187)
Average Age	42	36
Median Age	41	32
Average Years Lived in NWA	22	16
Median Years Lived in NWA	20	15
Median HH Income Range	\$50,000–\$75,000	\$35,000–50,000
Median Education Level	Completed 2yr Degree	Completed 2yr Degree <sup>7</sup>
Percent with at least a bachelor’s degree	28 percent	29 percent

The following two graphs provide some additional information about people who reported intending to stay and those intending to leave, based on more detailed information on their characteristics.

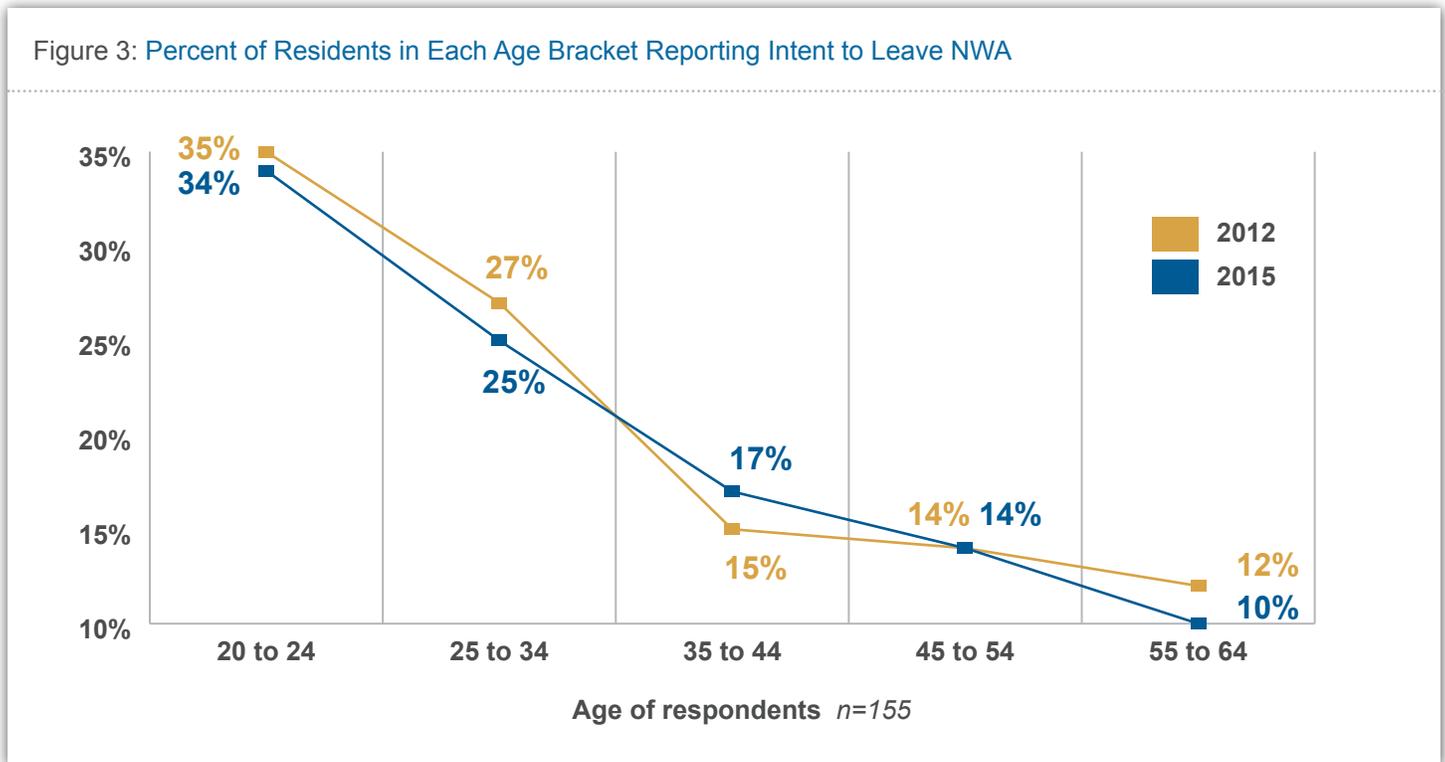
The first chart (Figure 2) shows residents who are planning to leave by **income** bracket. Differences from 2012 greater than 10 percentage points were: 1) a decrease since 2012 in plans to leave among those making \$35,000-\$50,000 and \$100,000-\$150,000 and 2) an increase in plans to leave for those making less than \$10,000, \$15,000-\$20,000, and \$25,000-\$35,000.

Figure 2: Percent of Residents in Each Income Bracket Reporting Intent to Leave NWA



<sup>7</sup> The percent of all residents earning a bachelor’s degree was 20 percent; 29 percent reported earning bachelor’s and above.

The second graph (Figure 3) shows the percent of residents in each age bracket who anticipate leaving Northwest Arkansas in the next five years, with a downward trend as residents age. None of these differences were particularly large (10 percentage points or greater).



### 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 not. 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. These factors are in many ways outside of the influence of WFF; however, residents report satisfaction with and high levels of usage of WFF investments (as reported in the following sections).

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

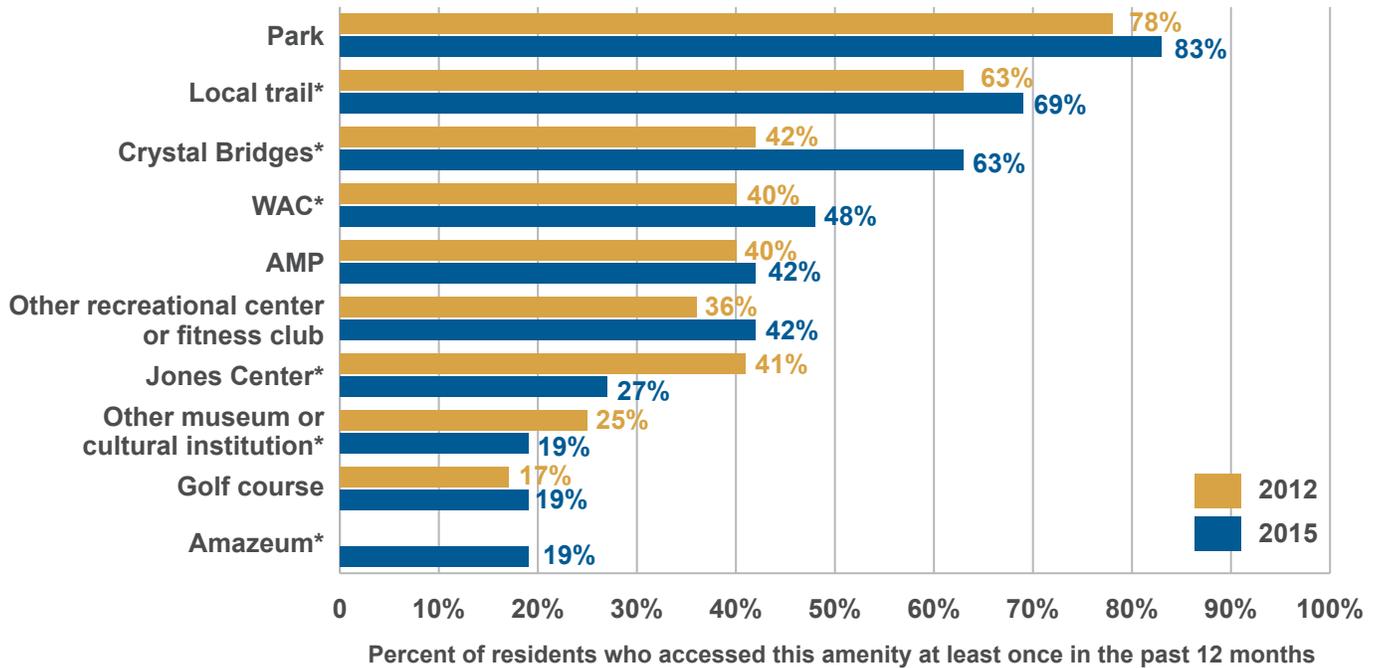
ARTS AND CULTURAL AMENITIES

Investments

WFF’s family-directed arts and cultural amenity investments from January 2013 to January 2016 were \$15.7 million to 10 organizations. Grantees include the Walton Arts Center, TheatreSquared, and the Symphony of Northwest Arkansas.

As Figure 4 below shows, between 27 percent and 69 percent of NWA residents reported using these amenities at least once in the past 12 months<sup>8</sup>.

Figure 4: Amenity Use in the Past 12 Months



\*Starred amenities have been a focus of WFF funding. In 2012, WAC and AMP were combined. They were separated in 2015 survey.

<sup>8</sup> For the majority of amenities, usage from 2012 appears to have increased. The Jones Center saw a significant 14 percentage point decrease

## Results

In addition to reporting on residents' overall rates of visitation and use of area amenities, we also analyzed usage patterns of foundation-funded amenities by income, race, ethnicity, and metro area.

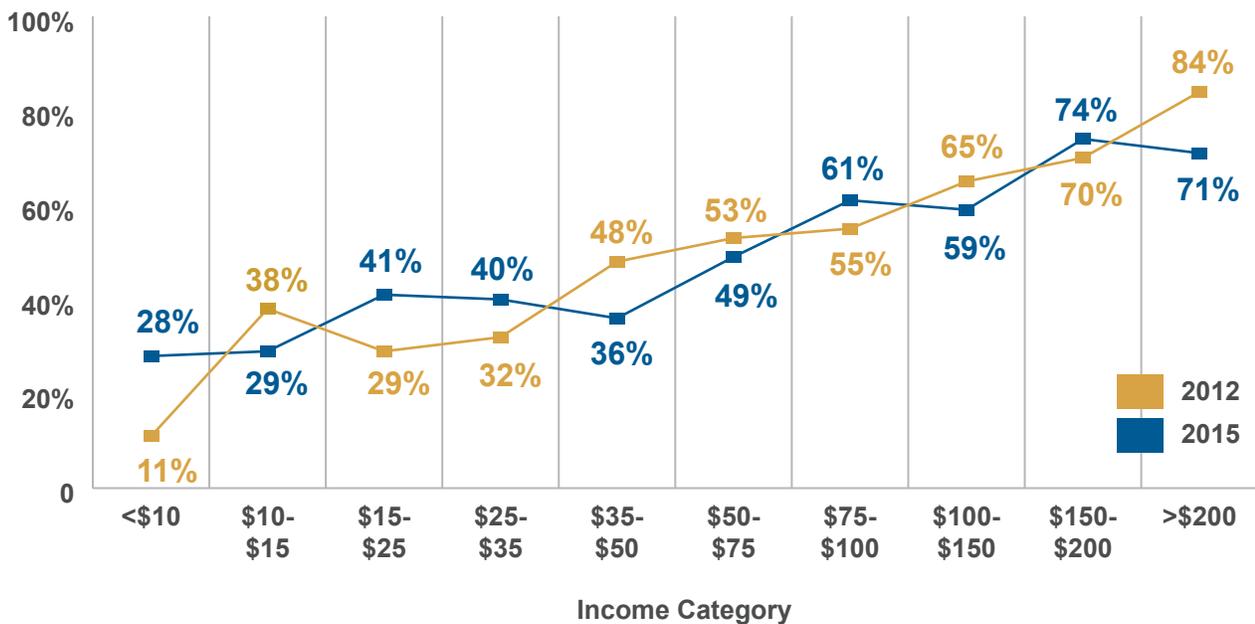
There was a statistical difference in usage rates by income for two of the amenity investments. As Figures 5 and 7 show below, there was a linear relationship between visits and income for WAC and Crystal Bridges — i.e., wealthier residents are more likely to report using these amenities.

### Walton Arts Center

There was no statistical significance in visitation rates for WAC by ethnicity or race, but there was a statistically significant difference in visitation rates by resident metro area, education, and income level.

Residents of Bentonville (52 percent), Fayetteville (49 percent), and Rogers (48 percent) were more likely to report having visited WAC than Springdale (36 percent).

Figure 5: Relationship between Resident Income Level and Patronage Rate of the Walton Arts Center: Wealthier Residents More Likely to Attend WAC<sup>9</sup>



<sup>9</sup> The overall rate of attendance at WAC increased from 40 percent in 2012 to 48 percent in 2015. The chart that relates income and attendance does not reflect that increase because only 82 percent of respondents provided their income levels.

## Crystal Bridges

There was a large overall increase (21 percentage points) in resident attendance at Crystal Bridges, and all races saw increases as well. All races report high attendance rates at Crystal Bridges, ranging from 43 percent (Native Americans) to 83 percent (Asians). Of Hispanic residents, 62 percent reported having visited the museum (compared to 63 percent of non-Hispanic residents), which is an improvement from 2012 when 30 percent of Hispanic residents reported having visited the museum (compared to 43 percent of non-Hispanic residents).

Similar to WAC attendance, wealthier residents were more likely to report visiting Crystal Bridges. There were also differences in Crystal Bridges attendance rates by resident education level (Figure 6) and resident geography (Figure 8 below).

Figure 6: Relationship between Resident Education Level and Rates of Crystal Bridges Visitation: More Educated Residents More Likely to Visit Crystal Bridges

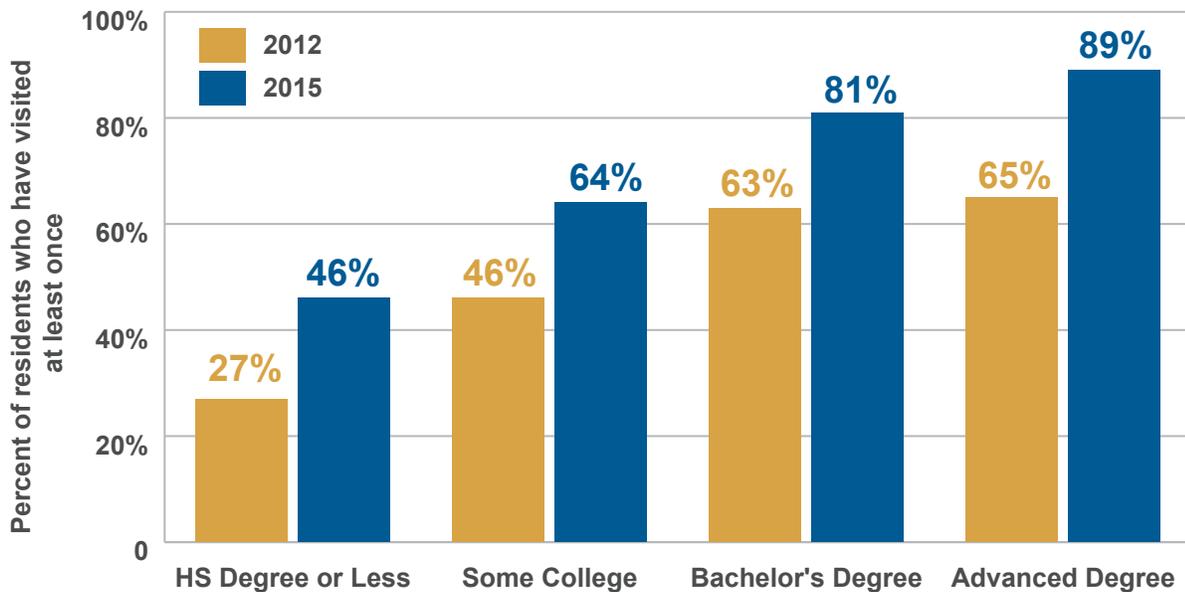


Figure 7: Relationship between Resident Income Level and Crystal Bridges Visitation Rates: Wealthier Residents More Likely to Visit Crystal Bridges

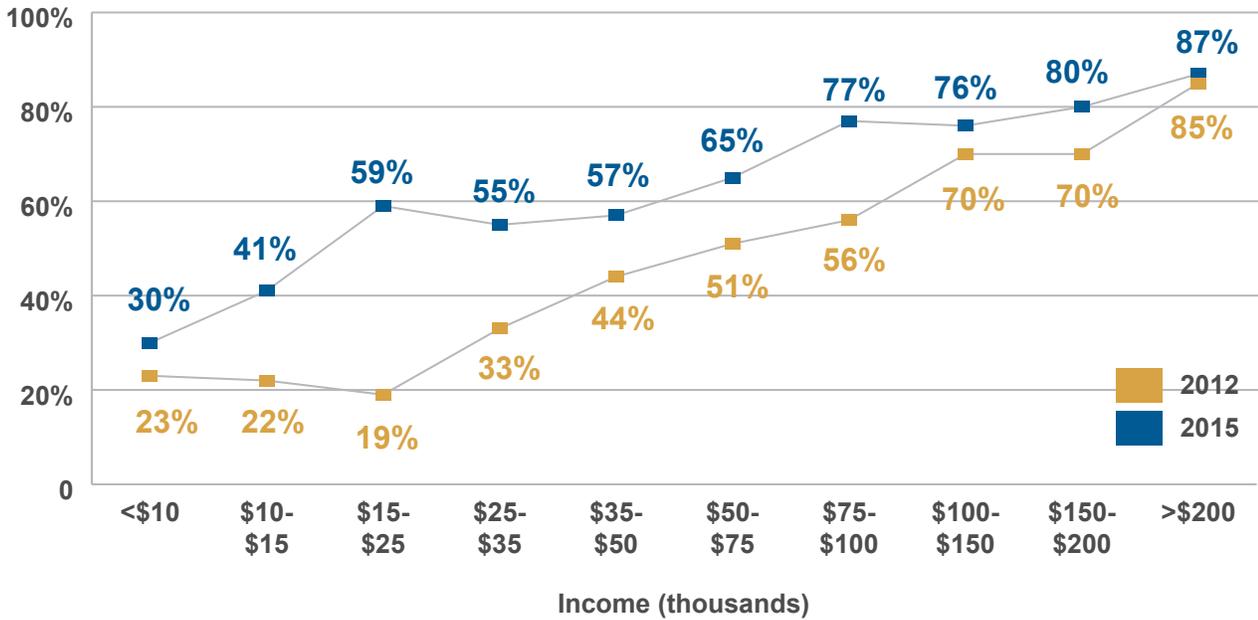
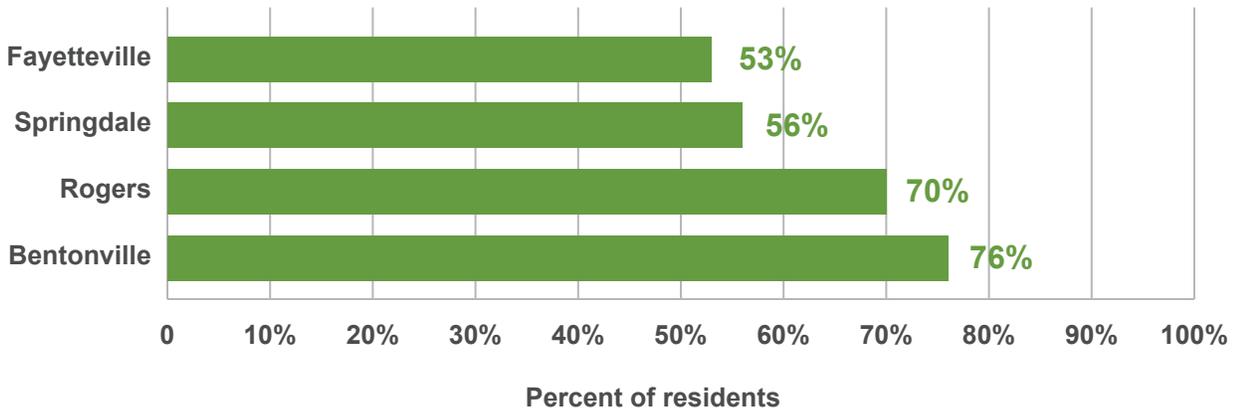


Figure 8: Relationship between NWA Residents Geographic Location and Crystal Bridges Visitation Rates: Residents who Live Closer to Crystal Bridges are more likely to attend

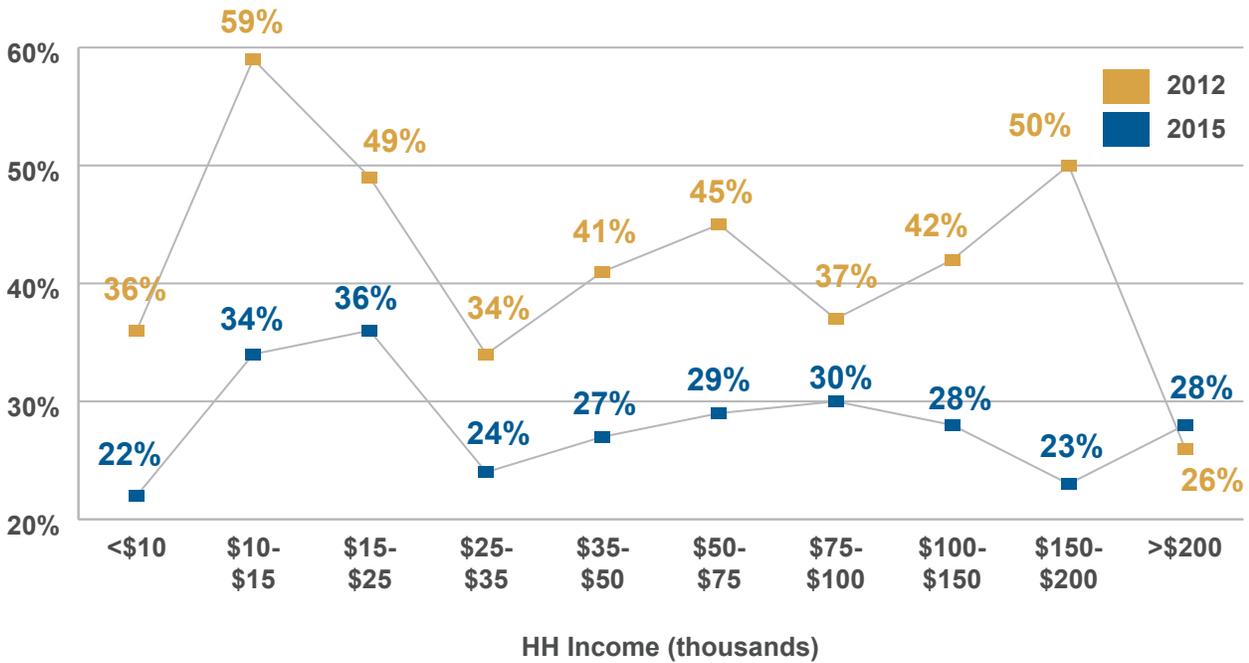


## Jones Center

Fewer residents reported using the Jones Center in 2015 (27 percent) than in 2012 (41 percent).

Hispanics (29 percent) are slightly more likely to report accessing the Jones Center compared to non-Hispanics (26 percent), and residents in Springdale (42 percent) are more likely to report accessing the center than any other municipality.

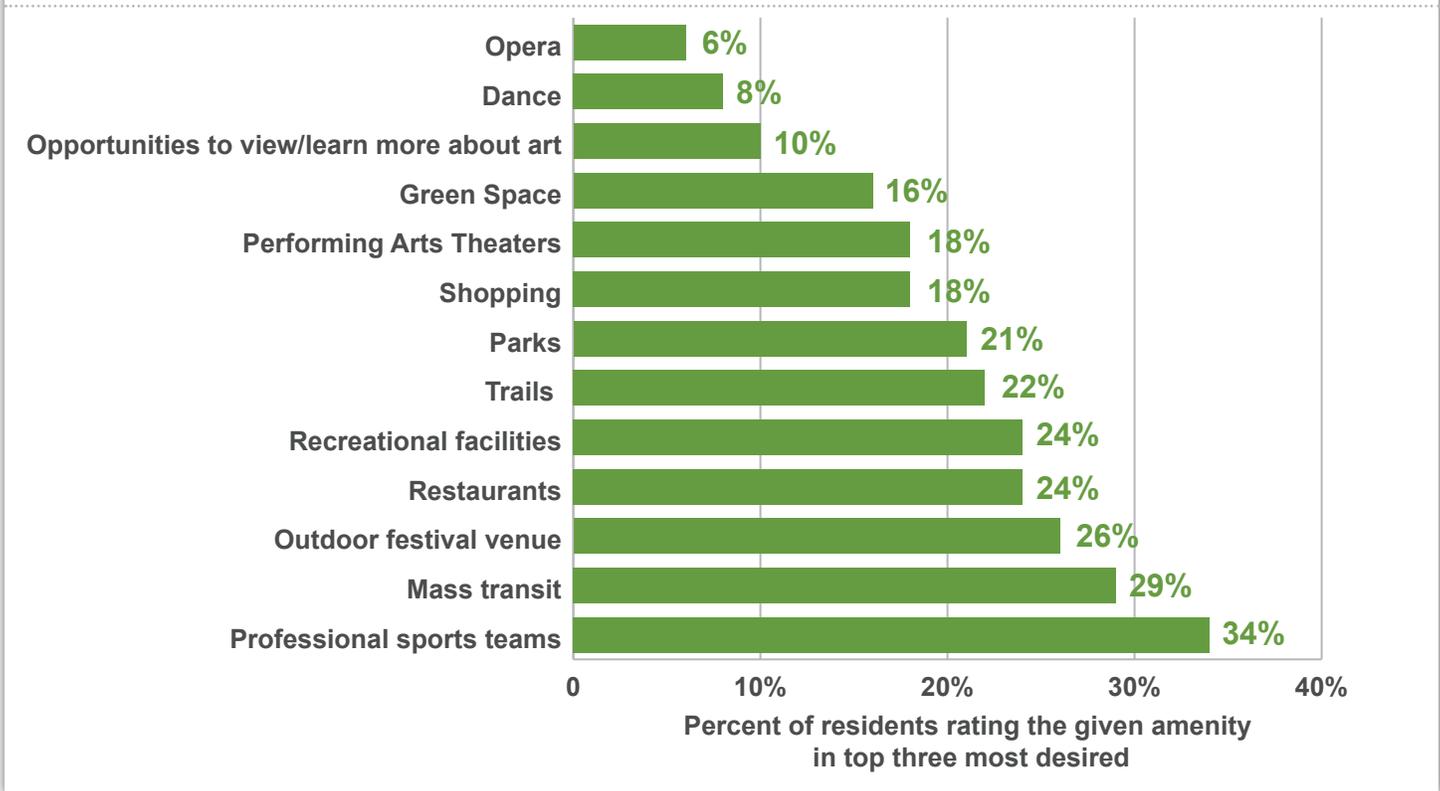
Figure 9: Relationship between Resident Income Level and Jones Center Usage Rates: Lower Income Residents More Likely to Use Jones Center



## Potential Amenities

The next chart (Figure 10) shows the new amenities most desired by residents. The top three desired amenities, chosen by at least 25 percent of the residents, were: 1) professional sports team; 2) mass transit; and 3) an outdoor festival venue.

Figure 10: Residents Would Like More of these Amenities



## Implications

The high reported usage rates of foundation amenities indicate these amenities matter to residents across the region. In particular:

- » Trails are used by 69 percent of residents, a six percentage point increase from 2012. Asian residents had the highest percent reporting having used a trail at least once in the past year (94 percent), followed by African American (85 percent), and whites and other (both 69 percent).
- » With 63 percent of residents taking advantage of the amenity, Crystal Bridges is the most used arts and culture facility, followed by the Walton Arts Center (48 percent).
- » The survey also confirms that the Jones Center is serving the population for which the foundation's grant was intended—lower-income residents and Hispanics, though overall usage rates are down.
- » Resident income level does appear to affect visitation rates to amenities, even to Crystal Bridges and trails, which can be accessed for free.
- » Proximity also appears to matter in terms of frequency of visits. For example, Bentonville residents are more likely to have visited Crystal Bridges, and Springdale residents are more likely to have visited the Jones Center. Two key questions related to future amenity investments are: 1) Amenity usage rates are impacted by income. Is the foundation interested in increasing usage rates among the lower income brackets for WAC and Crystal Bridges? 2) Twenty-nine percent expressed a desire for mass transit. Is the foundation interested in supporting new mass transit options?

## NWA EDUCATION – WORLD-CLASS SCHOOLS

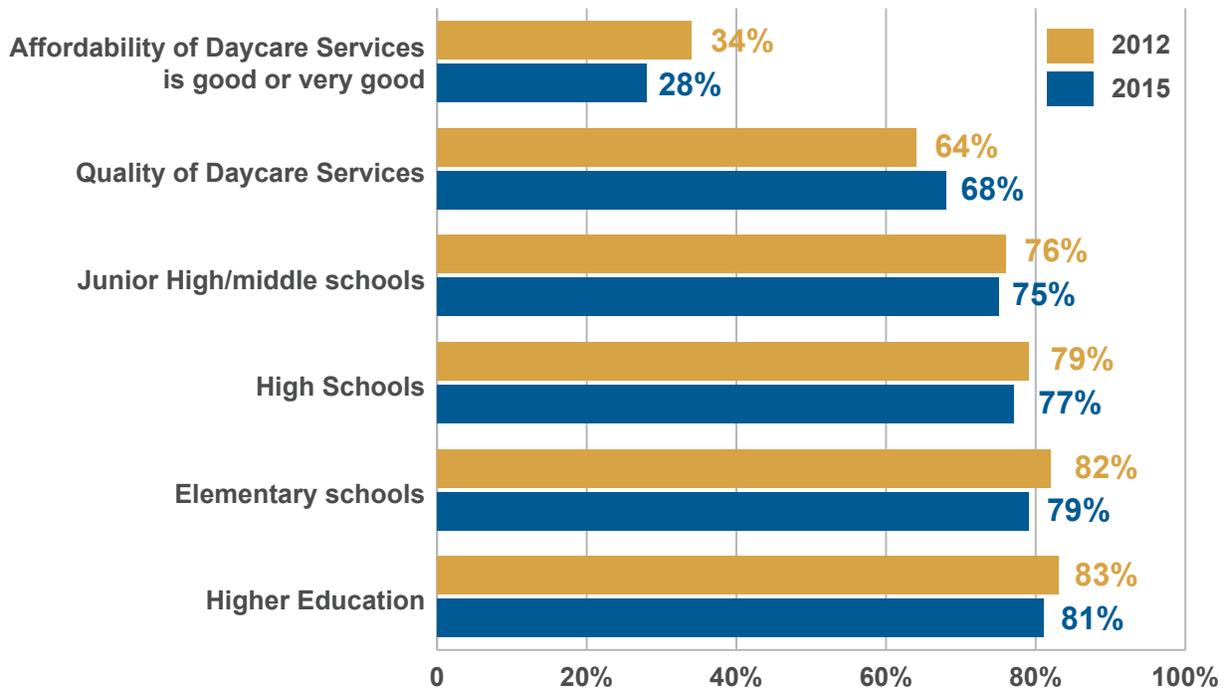
### Investments

Foundation Home Region education grantees include Arkansas Advanced Initiative for Math and Science, Helen Walton Children’s Enrichment Center, Arkansas Public School Resource Center, six public charter schools, and one private school. Overall, investments between January 2013 and January 2016 were \$20.3 million in 14 organizations.

### Results

Overall, 75 to 81 percent of respondents perceived the quality of elementary school through higher education to be of good or very good quality. This is down slightly from 2012 when the range was 76 to 83 percent. Sixty-eight percent perceived daycare offerings in the region as high quality, and only 28 percent believed daycare to be affordable.

Figure 11: Respondent Perceptions of Quality Local Education and Pre-K Affordability (Percent offering a response)<sup>10</sup>



The small fluctuations in perceptions of quality at other levels are not particularly meaningful.

<sup>10</sup> Residents could select a “does not apply option” on the question of quality schools. The number of respondents on the school quality questions and Pre-K affordability ranged from 517 to 711.

### Perceptions of Daycare/Pre-K

Further analyses of the respondents who thought daycare services were not of high quality revealed no statistically significant differences by respondent income level. There was, however, a difference by metro area, with Springdale residents having a higher level of agreement that daycare is of “good” or “very good” quality.

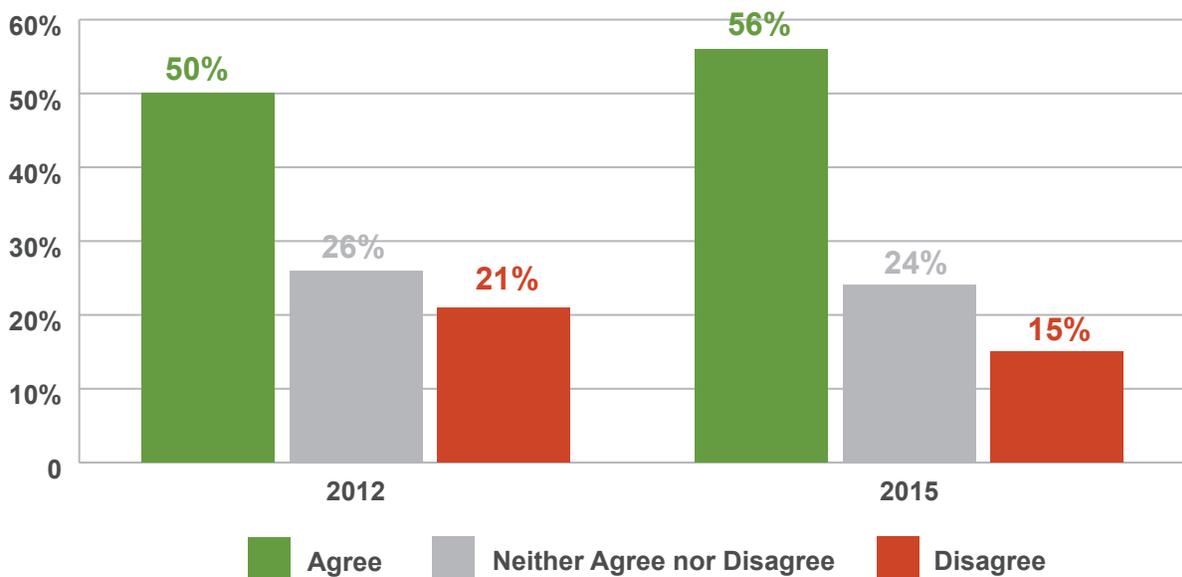
### Perceptions of School Choice

Fifty-six percent of residents agreed or strongly agreed that having school options would be good for the community, which is a five percentage point increase from 2012.

Only 15 percent disagreed or strongly disagreed, a six percentage point decrease from 2012. An additional 24 percent said they neither agreed nor disagreed.

In addition, the following groups tended to view choice more favorably: women and Hispanics. There was no statistical difference by race. Rogers (66 percent) had the highest percentage of residents who supported more school choice, followed by Springdale (63 percent), Fayetteville (56 percent), and Bentonville (56 percent). All municipalities saw an increase in percent of residents in support of choice, but Rogers had the largest increase (19 percentage points).

Figure 12: Percent of Residents Who Support School Choice



### Implications

As in 2012, the region’s residents widely view local schools as providing a high-quality education. A small percentage (between three percent to five percent depending on the question) of all residents saw school quality as a serious problem, which may influence their decisions to leave the region. Another notable finding is that 56 percent of residents also thought more K-12 school choice options would benefit the community, a small increase from 2012.

Key questions related to future education investments are:

- 1) WFF has funded the Helen R. Walton Children’s Enrichment Center to train other daycare centers, but does the foundation want to do more to impact Pre-K quality?
- 2) Is Pre-K affordability an issue for the foundation?
- 3) Public opinion appears high enough to support a more aggressive campaign for additional school choice options in Northwest Arkansas; does the foundation have appetite to address this more aggressively?

## SENSE OF PLACE

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### Investments

Grantees include the Bentonville Bella Vista Trailblazers Association, Northwest Arkansas Council Foundation, the Northwest Arkansas Regional Planning Commission, and the cities of Bentonville, Fayetteville, Rogers, and Springdale. From January 2013 through January 2016, the foundation invested \$35.7 million in 20 organizations.

## SENSE OF PLACE: ENVIRONMENT

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### Results

Most residents (89 percent) believe water pollution is not a problem. In addition, 91 percent of residents believe air pollution is not a problem.

### Implications

Water quality is currently not a concern for most residents, with 89 percent responding that water pollution was not an issue. The issue of nutrient reduction in the Illinois River Watershed is still primarily a municipal and corporate concern, as water users have not yet been impacted. Public opinion on air quality has remained high with 91 percent of respondents not believing air pollution to be an issue.

Key question related to future environmental program investments:

- » Should the fact that water quality is not a concern for most residents influence the foundation's strategy? If so, how?

## SENSE OF PLACE: TRAILS

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### Results

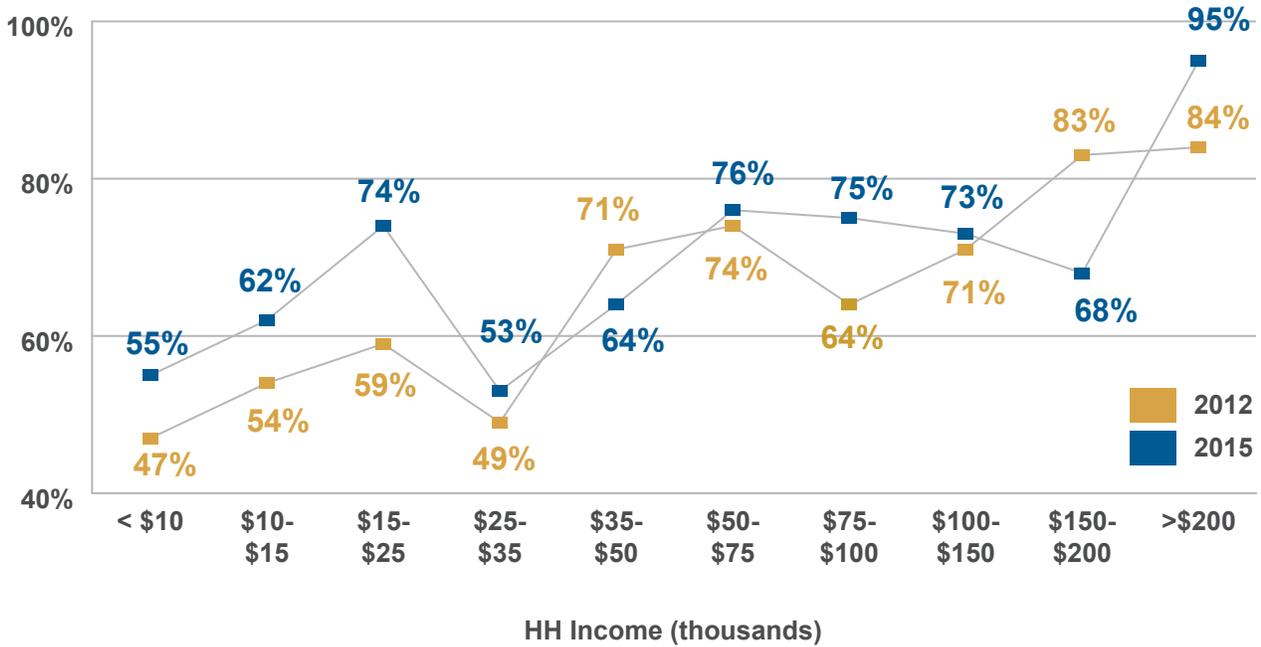
Trails in NWA saw both high levels of use (69 percent of residents) and an increase in usage rate (6 percentage points). There was a difference in reported trail use based on metro area, race, and ethnicity. Bentonville (81 percent) and Fayetteville (71 percent) had the highest reporting of trail use; Rogers was at 61 percent and Springdale at 53 percent. African Americans (85 percent) and Asians (94 percent) reported the highest trail use. Hispanics (72 percent) were more likely to report using the trails than non-Hispanics (68 percent).

### Implications

Trails had the highest reported usage among the amenities (69 percent usage). There were differences in trail usage by geography. Key question related to future trails investments:

- » Does the foundation want to think about ways to increase trail usage in certain geographies?

Figure 15: Relationship between Trail Usage Rates and Resident Income Levels: High Rates of Trail Use at All Income Levels; Wealthier Residents More Likely to Use



## SENSE OF PLACE: DOWNTOWN DEVELOPMENT

### Results

Overall, 34 percent of respondents reported an increase in visits to downtown areas over the last year, while 51 percent reported no change. Respondents were most likely to visit downtowns to dine, shop, and attend the farmers market.

Reason for visiting downtowns did not have a strong relationship to income, with a few notable exceptions. Respondents who reported earning over \$75,000/year were far more likely to report dining in the downtowns, going to the farmers market, and seeking entertainment.

### Implications

Related to future downtown investments: Does the foundation have an interest in encouraging healthy eating habits among the low-income population by making it easier for low-income folks to use the farmers markets?

## ECONOMIC DEVELOPMENT AND INFRASTRUCTURE

### Investments

The foundation's two primary economic development and infrastructure grantees are the Northwest Arkansas Council Foundation and the Northwest Arkansas Community College Foundation. Investments to seven organizations over three years totaled \$25.7 million.

The survey questions primarily addressed infrastructure adequacy, including perceptions of mass transit and the airport.

### Results

#### Mass Transit

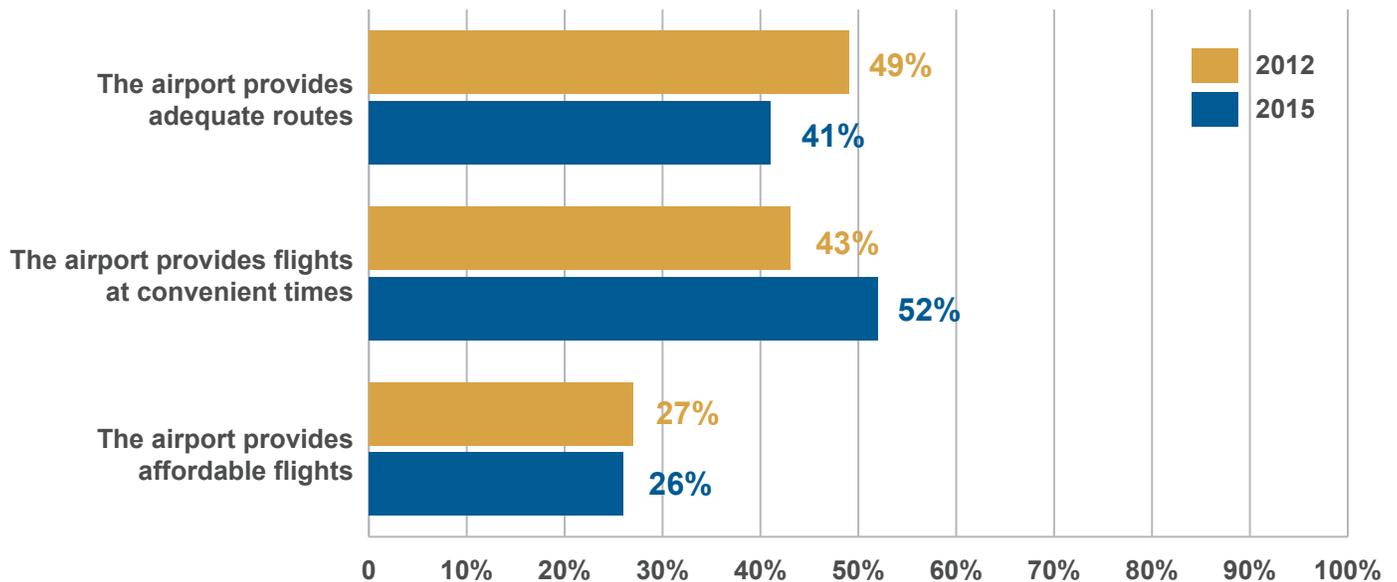
Mass transit was identified as a desired amenity by 29 percent of residents, with multi-racial and non-Hispanic residents reporting mass transit as a priority over other races and ethnicities.

#### Airport and Airlines

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

- » Only 41 percent of residents said the airport provides adequate routes, which is down from the 49 percent reported in 2012. Twenty-two percent neither agreed nor disagreed, and 18 percent disagreed.
- » Fifty-two percent said flights were at convenient times, an improvement from 43 percent in 2012. Nineteen percent neither agreed nor disagreed, and 11 percent disagreed. (Fayetteville residents were more likely to say flights were at inconvenient times.)
- » Only 26 percent said flights were affordable (27 percent in 2012), 21 percent neither agreed nor disagreed, and 35 percent disagreed.

Figure 16: Minority of Residents Think Airport Provides Adequate, Convenient and Affordable Flights



## Implications

Residents expressed concerns about dangerous driving in their neighborhoods and affordability of flights to and from Northwest Arkansas. In addition, 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 84 minutes).

Key questions related to future economic development and infrastructure investments are:

- 1) What, if any, role should the foundation play in reducing the cost of air travel out of XNA?
- 2) What, if any, role should the foundation play in mass transit initiatives?

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## 3. OTHER QUALITY OF LIFE TOPICS

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In this section, we asked residents 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 focus of any NWA WFF grant making. We included these topics 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.

### CRIME AND SAFETY

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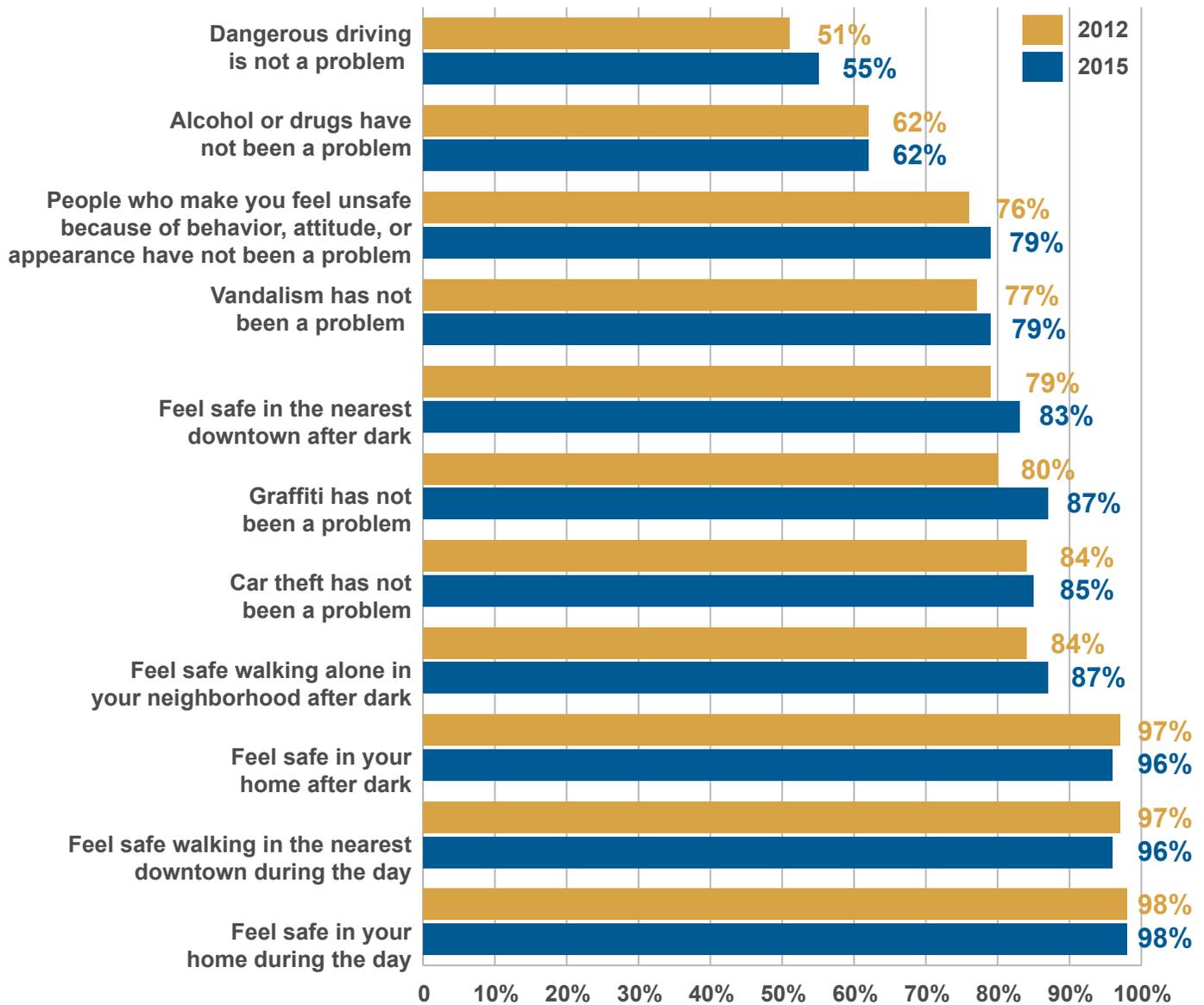
Safety questions explored how safe residents felt in different locations, such as their home, their neighborhood, and their closest downtown metro area during the day and at night. The survey also included questions about types of crime activity, including graffiti and car theft, and whether residents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

#### Results

Overall, more than 80 percent of residents reported feeling safe in a variety of situations. 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 percent of residents who felt safe in their neighborhood after dark (84 percent).

The largest crime and safety problem identified by residents was related to dangerous driving. Forty-four percent felt dangerous driving was a problem. Overall since 2012, perceptions of crime and safety have improved or remained stagnant.

Figure 17: Perceptions of Community Crime and Safety



### Implications

NWA 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.

Key questions for strategic discussion are:

- 1) The largest crime/safety issue noted by residents is dangerous driving. Is dangerous driving an issue the foundation has any interest in addressing?
- 2) Perceptions around an increase in gang activity emerged in the qualitative responses. Is this an issue the foundation is interested in gathering additional evidence around?

## DIVERSITY

For the two primary questions that addressed this area:

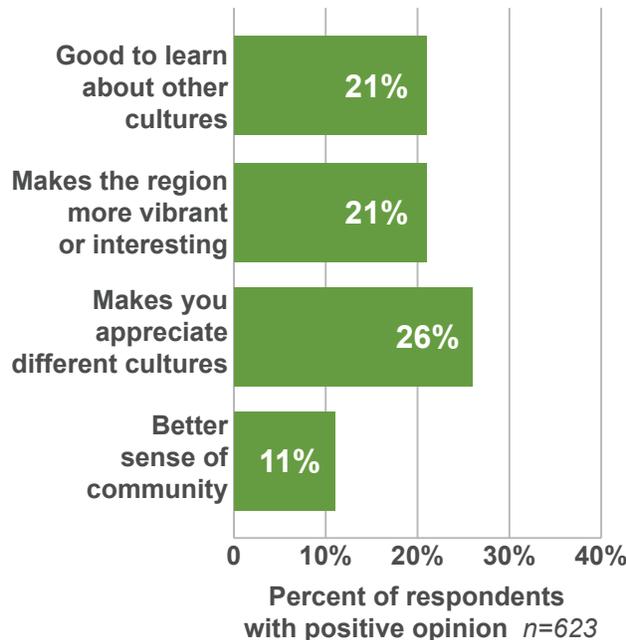
- 1) In 2015, 87 percent of residents said they felt accepted by people in the local community (85 percent in 2012). Although there was a statistically significant difference by race, all races reported relatively high levels of acceptance. The two groups with lower perceptions of acceptance were African Americans at 79 percent and American Indians at 64 percent (versus whites at 88 percent).
- 2) Sixty percent of residents said different lifestyles and cultures and the region's increasing diversity

make Northwest Arkansas a better place to live, which is the same percentage as 2012.

When residents were asked why diversity makes the region a better place to live, answers were almost equally divided among: "makes you appreciate different cultures", "makes the region more vibrant and interesting", and "good to learn about other cultures." The top two reasons for why diversity makes the region a worse place to live, which was only asked of residents who held this belief (13 percent), were "too many undocumented immigrants" and "difficult communication."

Figure 13: Perceptions of How Diversity Helps NWA  
(of the 60 percent agreeing)

### Why does diversity make NWA a better place?



## Implications

People overwhelmingly reported feeling accepted by the local community, although African Americans and American Indians reported lower percentages of acceptance, 79 and 64 percent respectively. These are still relatively high percentages, which may indicate low levels of racial and ethnic tension. The only group of respondents by income level feeling a lack of acceptance in the community was lowest income residents.

Sixty 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. Although it is a positive picture, the region has not seen increased feelings

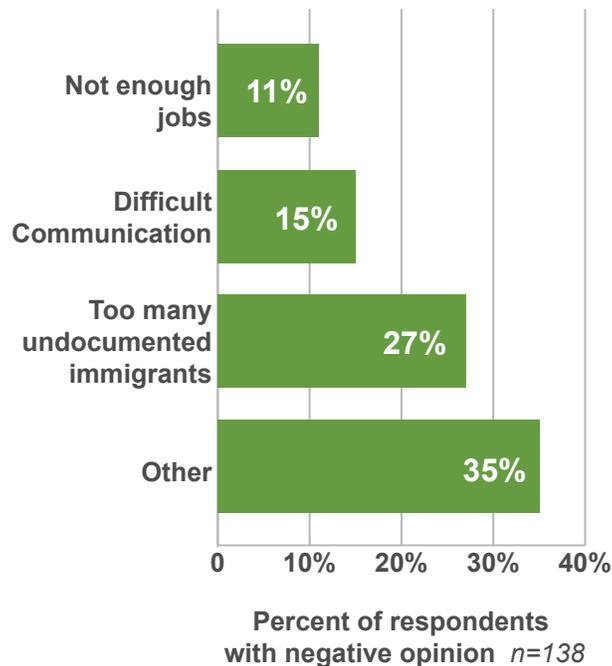
of acceptance from the baseline in 2012. From an employee recruitment standpoint, the survey does not provide information about people who choose not to move to the region because of a lack of diversity.

Key questions for strategic discussion:

- 1) Given the relatively low levels of racial tension and discord, what types and amounts of diversity and inclusion investments make most sense, if any?
- 2) Given the static nature of this perception, are there any proactive steps to be taken to promote forward progress?
- 3) Most residents feel accepted, regardless of race, with the exception of lowest income residents. Is there an interest in addressing the perceptions of exclusion reported by the lowest income community?

Figure 14: Perceptions of How Diversity Helps NWA (of the 13 percent agreeing)

### Why does diversity make NWA a worse place to live?



## COMMUNITY ENGAGEMENT

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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.

### Voter Participation and Local Government Perception

#### Results

The region's voting rates, (47 percent) within the past 12 months are higher than the national turnout in the federal election in 2010 (36 percent). The majority of residents (52 percent) also expressed confidence in local government decision-making; this is one percentage point lower than reported on the 2012 survey.

#### Implications

Overall, community engagement in Northwest Arkansas is comparable to, and in some cases exceeds, national averages.

Key question for strategic discussion:

1) Community engagement indicators are similar to national rates. Is there any desire for the foundation to work to promote higher levels of civic engagement?

### 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

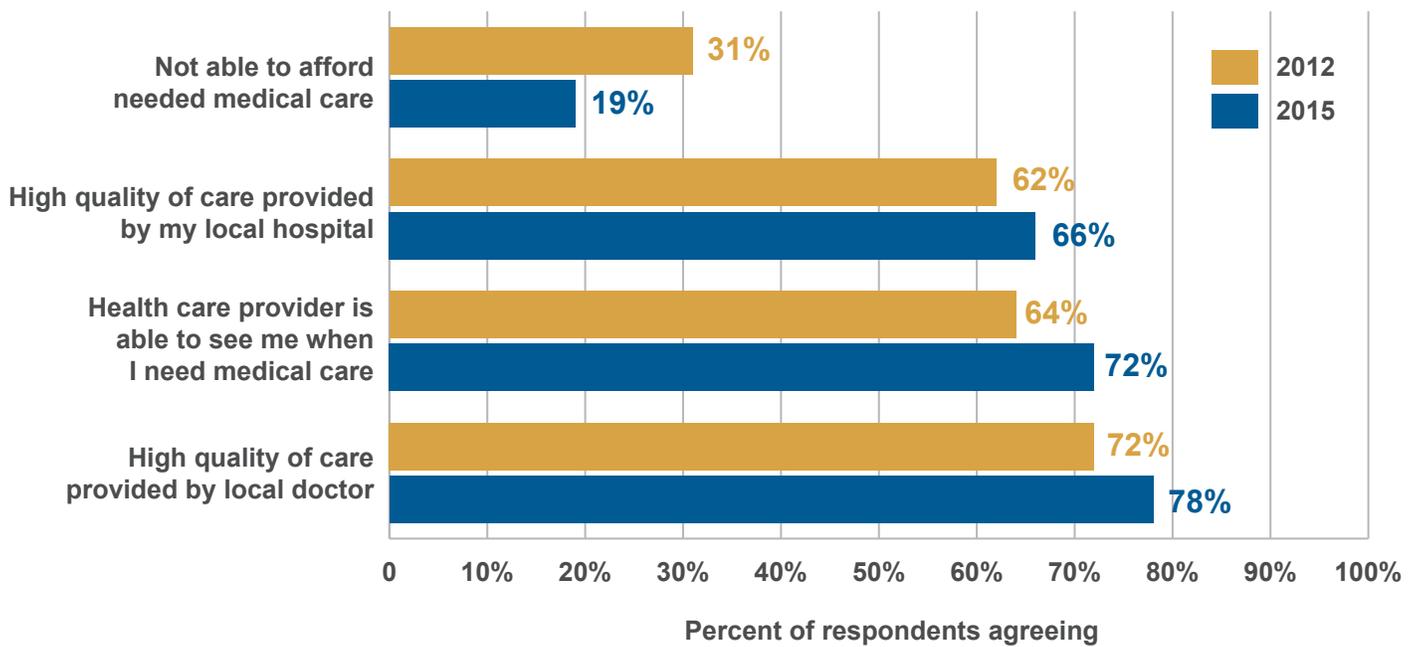
The majority of residents who offered an opinion are satisfied with access to medical care in Northwest Arkansas. Seventy-two percent agree they have good or very good access to their health care provider, 82 percent to medical services for their child locally, and 65 percent to mental health care services. There are, however, still some residents who have serious concerns about access. Ten percent note they have poor or very poor access to their health care provider, seven percent to medical services for their child locally, and 17 percent to mental health care services

Similarly, the majority of all residents are satisfied with the quality of care they receive at their local doctor and local hospital. Seventy-eight percent rate the quality of care at their local doctor as good or very good, and 66 percent do so for their local hospital. Again, there are some residents with concerns, particularly related to quality of care at the local hospital, where 10 percent rate that as poor or very poor.

Perhaps surprisingly, when considering the relationship between income level and issues related to healthcare (affordability, access, quality, access for kids), the only linear relationship that emerged concerned affordability.

Also of note, 19 percent of residents said they were not able to afford needed medical care, down 12 percentage points from 2012.

Figure 18: Perceptions of Healthcare: Some Problems with Access and Affordability



### Implications

Questions about health care reveal some concerns about access to care. While 78 percent of residents reported positive perceptions about the quality of care they receive from their local doctors and 72 percent reported that their health care providers could see them when needed, that leaves nearly 20-30 percent of residents with concerns in these areas of quality and access.

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

A key question for strategic discussion is: Is access to health care an issue the foundation should explore further?

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## CONCLUSION

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### Impact of Foundation Investments

Perceptions about the overall quality of life in Northwest Arkansas are high. While top reasons are related to family and income, the foundation is playing a key role in contributing to positive perceptions about life in the region. The amenity investments made by the foundation have high, and in some cases (e.g., Crystal Bridges) significantly increasing, usage rates, with between 27 percent and 69 percent of residents reporting visiting an amenity supported by the foundation.

### Limitations/Moving Forward

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 investment strategies. In most cases, the results provide evidence that the foundation's strategic investments are making a difference and showing improvement from the 2012 survey. For example, the foundation has presumed 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.

Other topics identified by residents as problems or areas of concern may be worth further study. For example, the survey identified some concerns related to affordability of flights. However, the survey does not indicate how residents interpreted affordability, what options are available, or what role philanthropy might play in addressing this problem.