



COMMUNITY ASSESSMENT

ROGERS-LOWELL AREA, ARKANSAS

Submitted by *Market Street Services Inc.*
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INTRODUCTION

The Rogers-Lowell area has a strong track record of resident-driven and collaboratively implemented strategic plans. In 1989, the Rogers-Lowell Area Chamber of Commerce collaborated with city and regional leaders to produce Vision 2000: A Strategic Plan for Rogers-Lowell. Since then, the community's vision has been updated five times, most recently in 2008 with the development of Vision 2025. And now, as the community and region emerge from the Greater Recession and continue to experience an influx of new residents from outside the region, there is a need to revisit the vision once again, acknowledging that many initiatives from Vision 2025 have been completed or are currently underway, and that a new set of short-term and long-range priorities need to be established. While some issues remain at the forefront of residents' minds today as they did in 2008 – including transportation infrastructure and aesthetics – others have emerged as more important to residents' vision of an ideal community, including but not limited to the vibrancy of downtown Rogers and the development of entertainment and nightlife options.

The process of updating the vision will culminate in the development of a new Community Action Plan predicated upon resident input and supported by a spirit of collaborative implementation. Inherent in this approach is a commitment to advance what is best for the larger region – Northwest Arkansas – and not simply that which is best for Rogers-Lowell. The community and its residents understand that they are part of a larger economy, and indeed a larger community; one that collectively provides greater opportunity, resources, and amenities than any single community can provide.

This Community Assessment seeks to provide a comprehensive overview of the trends and issues facing Rogers-Lowell in 2014 and beyond within the context of residents' vision for the future and considering the larger implications of regional development. Nine key "stories" frame the discussion herein, each weaving multiple data points with resident input to highlight the issues that merit strategic attention.

These nine stories are:

1. Rogers-Lowell and Northwest Arkansas: A Regional Mindset
2. Growth and Migration: Rogers-Lowell and Its Position within Northwest Arkansas
3. The Changing Face of Rogers-Lowell: Diversity, Inclusion, and Equity
4. Education and Incomes: Opportunity in Northwest Arkansas
5. Economic Transition in Rogers-Lowell
6. Traffic, Transportation, and Infrastructure
7. Public Education in Rogers-Lowell: Preserving an Asset
8. Quality of Life: Community Appeal to Various Groups
9. The Future of Downtown Rogers

PROJECT OVERVIEW

The six-month strategic planning process includes extensive stakeholder input and quantitative research to inform the development of strategic recommendations and implementation guidelines.

PHASE I: STAKEHOLDER INPUT

Input from residents, businesses, and community leaders will help identify core issues facing the community and will help define a consensus vision for the community's future. In order to solicit this input, the Steering Committee's guidance and feedback will be complemented by a series of interviews and focus groups conducted in January and February 2014. Interviews and focus groups will be supplemented by a widespread community survey that will be open to all residents and businesses of the Rogers-Lowell area. The input phase will also support and inform the development of a new Downtown Master Plan for the City of Rogers, a separate but complementary initiative to this strategic planning process.

PHASE II: COMMUNITY ASSESSMENT

The Community Assessment will provide a detailed examination of the Rogers-Lowell area's competitiveness as a place to live, work, and do business. The Assessment will leverage quantitative and qualitative research, and will highlight the key "stories" facing the Rogers-Lowell area, and the larger Northwest Arkansas region, in 2014 and beyond. Collectively, these stories will highlight the community's strengths, weaknesses, opportunities, and challenges as identified by resident input and key demographic, socioeconomic, and economic trends. When relevant and appropriate, the performance and competitiveness of the Rogers-Lowell area will be benchmarked against communities with which the area competes for both jobs and workers.

PHASE III: COMMUNITY ACTION PLAN

The third phase of the process brings together the findings from the first two phases to create a holistic, consensus-based Community Action Plan to guide collaborative economic development and community improvement initiatives in Rogers-Lowell in the years to come. Strategic recommendations will be driven by the research findings – both qualitative and quantitative feedback – and supportive of residents' vision for the community. Examples of best practice programs, policies, and initiatives from communities around the country will also be included to help inform strategic recommendations and their subsequent implementation. The Community Action Plan will also be informed by a Marketing Review analyzing the effectiveness of local and regional community and economic development marketing efforts.

PHASE IV: IMPLEMENTATION GUIDELINES

The final phase of the strategic planning process is the development of Implementation Guidelines that support the effective and efficient implementation of the Community Action Plan's strategic recommendations. For each of the various recommendations, the Implementation Guidelines will identify lead implementers, key partners, potential costs, the appropriate timeline for implementation, and metrics for gauging implementation success. This final phase of the process will be supported by an Organizational Analysis of the Rogers-Lowell Area Chamber of Commerce, including an analysis of staff and financial resources necessary to support collaborative, effective, and efficient implementation in partnership with the City of Rogers, the City of Lowell, and a variety of other critical implementation partners.

STEERING COMMITTEE

The strategic planning process is guided by a diverse Steering Committee of leaders from the public, private, and non-profit sectors. These individuals will oversee the entire planning effort, help identify strategic priorities for the Rogers-Lowell area, build consensus, and serve as public advocates for the betterment of the community and its economic development. The following individuals have volunteered their time to serve on the Steering Committee.

Committee Member	Representing Organization
Raymond Burns	Rogers-Lowell Area Chamber of Commerce
Ric Clifford (co-chair)	Clifford Consulting
Dr. Janie Darr	Rogers Public Schools
Allyson Dyer	Rogers-Lowell Area Chamber of Commerce
David Faulkner	Pinnacle Hills Promenade Mall
Michael Harvey	Northwest Arkansas Council
Mayor Greg Hines	City of Rogers
Nick Hobbs	J.B. Hunt
Tom Hopper (co-chair)	Crafton Tull
Dr. Evelyn Jorgensen	Northwest Arkansas Community College
Greg Lindley	Simmons First
Mike Malone	Northwest Arkansas Council
Herbert Morales	World Trade Center
Charley Nevin	Hillshire Brands
Karen Parker	Walmart
Eric Pianalto	Mercy Health Northwest Arkansas
Cameron Smith	Cameron Smith & Associates
Greg Stanfill	Arvest Bank
David Thrasher	Thrasher & Chambers
Katie Wright	Rogers-Lowell Area Chamber of Commerce
Angie Tucker	Tucker's Appliances
Jerry Walton	Hunt Ventures
Marge Wolf	Northwest Arkansas Food Bank
Whitney Yoder	Rogers-Lowell Area Chamber of Commerce

COMMUNITY ASSESSMENT

This assessment examines the issues facing Rogers-Lowell and the larger Northwest Arkansas region by evaluating them through the prism of what *Market Street* believes to be the three critical aspects of a community: its **people**, their **prosperity**, and the quality of **place**. Findings related to these key attributes are incorporated into nine key stories that identify the most important issues impacting the Rogers-Lowell area's competitiveness. These stories represent themes that emerged from extensive public input provided by Rogers-Lowell area residents, businesses, and community leaders, as well as in-depth analysis of data covering demographic, socioeconomic, and economic trends within the community.

PUBLIC INPUT

FOCUS GROUPS AND INTERVIEWS: A thorough assessment of a community's strengths, weaknesses, opportunities, and challenges must be informed by input from the people that live, work, and do business in the community. Accordingly, *Market Street* conducted a series of focus groups and one-on-one interviews with residents and businesses in the Rogers-Lowell area during January and February 2014. The discussions that occurred in these focus groups and interviews will not only inform this Community Assessment, but will also help define the community's "vision" and establish appropriate recommendations to realize that vision. The input gathered during these discussions has been summarized and incorporated into this assessment when relevant and appropriate. **Public input – including that which was gathered via focus groups and an online survey – is differentiated throughout the report and presented in red text.**

ONLINE SURVEY: In addition to in-person input solicited via focus groups, interviews, and discussions with the Steering Committee, an online community survey was open to the public for three weeks in January 2014. **Nearly 1,650 residents responded to the online survey**, providing a tremendous level of community input that will help ensure that this Community Assessment is well-informed and that the forthcoming Community Action Plan is rooted in consensus – the community's collective vision for the future. **Findings from the online survey are integrated throughout this assessment and presented in red text.**

QUANTITATIVE INPUT

As previously mentioned, the input gathered from residents is married with extensive data analysis to help tell a story about where Rogers-Lowell has been, where it is today, and where it is headed in the years to come.

GEOGRAPHIES: While the geographic scope of this strategic planning process is focused on the Rogers-Lowell area, this research deliverable focuses on the City of Rogers as the primary geographic unit of analysis. This is due primarily to the limitations associated with publicly-available data at the city-level. Simply put, the Census Bureau and other federal agencies that produce and publish demographic, socioeconomic, and economic data, are often unable to produce reliable estimates from survey data in communities whose populations do not meet a certain threshold. Accordingly, there is far more available and reliable information covering the City of Rogers than the City of Lowell. However, when possible, information covering trends in the City of Lowell is also included in this assessment, and a representative

sample of survey respondents from the City of Lowell, combined with on-the-ground input, will ensure that the Community Action Plan considers the City of Lowell's specific needs.

While the City of Rogers is the primary focus of the data analysis in this assessment, this process and the resulting Community Action Plan must be mindful of the assets and opportunities in the larger Northwest Arkansas region. As this assessment will discuss in further detail, it is difficult to decouple the strengths and weaknesses of the Rogers-Lowell area from that of the surrounding Northwest Arkansas region. As a result, the analysis contained within also focuses on trends observed in the Fayetteville-Springdale-Rogers, AR-MO metropolitan statistical area, henceforth referred to as "Northwest Arkansas" or the "the metropolitan area."¹ And while **community input clearly indicated that the region is collectively stronger than the sum of its individual communities**, there are instances where the challenges and opportunities facing Rogers-Lowell cannot be fully understood without an examination of intra-regional dynamics (changes occurring *within* the region). Accordingly, as a component of this assessment, *Market Street Services* has analyzed trends other communities within the region, discussing them when relevant to community input and when necessary to provide appropriate context.

In addition to the aforementioned analysis of intra-regional trends, *Market Street* has also analyzed the performance and competitiveness of the Rogers-Lowell area and Northwest Arkansas against two metropolitan areas and two individual communities within those areas that are in close proximity and with which the community competes for both jobs and workers. These two regions and the communities within them are the Springfield, MO metropolitan area and the City of Springfield, and the Kansas City, KS-MO metropolitan area and the City of Overland Park. National trends are also provided to demonstrate the conditions facing the average American community.

DATA SOURCES: A wide variety of public and private data sources are used throughout this assessment. A great deal of information is drawn from the Census Bureau and complemented by data from many other public sources including but not limited to the Bureau of Labor Statistics (BLS), the Bureau of Economic Analysis (BEA), the National Center for Education Statistics (NCES), the Federal Bureau of Investigation (FBI), the International Revenue Service (IRS), and the Arkansas Department of Education (ADE).

A few key proprietary sources of information are leveraged to complement publicly available data and help provide additional detail. Data covering economic composition (employment and wages by business sector and occupation) are provided by Economic Modeling Specialists, Inc. (EMSI). Although this data is not available at the city-level, it is available for zip codes. Publicly-available data from the BLS covering employment by sector is only available at the county-level. EMSI allows *Market Street Services* to analyze trends in business sector composition for the four zip codes that most closely approximate the Rogers-Lowell area (72745, 72756, 72757, and 72758), providing more specific information on the community's economic composition and performance than a county-level analysis of Benton County supported by publicly-available data. While these zip codes do not entirely conform to the city limits of Rogers and Lowell, with 72756 and 72758 extending north and east beyond the communities' borders, they provide for a more accurate approximation of the local (city-level) economy as compared to county borders.

¹ The Fayetteville-Springdale-Rogers, AR-MO metropolitan statistical area (MSA) includes Benton, Madison, and Washington Counties in Arkansas and McDonald County in Missouri.

ROGERS-LOWELL AND NORTHWEST ARKANSAS: A REGIONAL MINDSET

This Community Assessment presents a discussion of the various factors that influence the attractiveness of Rogers-Lowell as a place to live, work, visit, and do business. It is clear from the community input gathered that a discussion of the challenges and opportunities facing Rogers-Lowell in 2014 cannot be decoupled from a discussion of Northwest Arkansas; the community's residents believe that Rogers-Lowell has more to offer than that which is simply contained within its jurisdictional borders. Rogers-Lowell, and its counterparts within the region – Bella Vista, Bentonville, Fayetteville, Siloam Springs, Springdale, and many other distinct communities – all have their own unique attributes and all combine to create a region that, when working together, is truly greater than the sum of its parts.

This is not a ground-breaking statement and should come as no surprise to anyone that has spent significant time in Northwest Arkansas. However, it is acknowledged up front as the first “story” in this report because the discussions that follow analyze a series of trends in Rogers-Lowell that have not occurred in a vacuum. They have occurred in a truly unique region; Northwest Arkansas is one of only a few multi-polar, polycentric regions in the United States, an attribute that underscores the relative importance of regional planning in Northwest Arkansas.

Simply put, polycentrism means “many centers” – it is a term that is frequently used to describe economic regions with multiple principal cities and no single, dominant urban core. There are many examples of polycentric regions in the United States but the majority are bi-polar regions with two dominant cities: Minneapolis-St. Paul, Raleigh-Durham, Tampa-St. Petersburg, Bloomington-Normal, and others. There are also a handful of tri-polar regions with three equally-sized cities: areas such as Palm Bay-Melbourne-Titusville, Florida and Albany-Schenectady-Troy, New York. Many considered Northwest Arkansas to be among this class in recent decades. But with rapid growth outpacing the regional average in historically smaller communities in Northwest Arkansas (including but not limited to Bentonville, Bella Vista, and Lowell), Northwest Arkansas has become a truly multi-polar region with few similarly-structured comparisons. A very limited number of metropolitan areas such as the Quad Cities in Iowa and Illinois (Davenport, Moline, East Moline, Rock Island and Bettendorf) and the Hampton Roads area of Virginia (Norfolk, Newport News, Chesapeake, and Virginia Beach) come to mind.

Where there is polycentrism there will always be intra-regional competition; it is a natural predisposition of many community leaders. Some of the regions listed above have struggled for decades to overcome significant barriers to regionalism, some making more progress than others. And in many cases the most significant barrier is simply an attitude: a mindset that actually seeks to highlight a neighboring community's challenges; a mindset that these challenges are not theirs to solve and the burden is not theirs to share. While there are certainly examples of discord and competition among communities and community leaders in Northwest Arkansas, they were not frequently mentioned by residents during the community input process. Residents have indicated that they are proud of the progress that has been made in Northwest Arkansas towards greater regional coordination and cooperation. This includes but is not limited to work completed decades ago and work that remains underway: projects like Northwest Arkansas Regional Airport, the construction of Interstate 540, and the development of the Razorback Greenway. But they see the continued pace of growth and understand that the work is not done. They are keenly aware that this growth will continue to pose a series of challenges on *all* communities in Northwest

Arkansas and not simply the community in which they reside. Many of these issues are discussed at greater length throughout this report.

So while there is consensus among Rogers-Lowell residents that there has been progress towards regionalism, and acknowledgement by some that the community has been a leader in this regard, there is still a strong desire for continued emphasis on regional coordination to mitigate challenges and capitalize on opportunities. The role of the Northwest Arkansas Council, which convened the regional economic development strategic planning process in 2010, was cited by many as central to advancing this objective.

The following are a sample of comments related to regionalism that were received by survey respondents:

"Rogers was a leader in blending the four major cities. We can only succeed in the future as a region and not just as one city. We should think about Rogers as a community member in a family called Northwest Arkansas."

"We need synchronized regional planning. It is very close with the hard work of area chambers of commerce and the Northwest Arkansas Council, but there is still an apparent battle among cities."

"There's too much division where there needs to be unity in promoting the region."

"Although I believe it is important for the growth of Lowell to have its own identity, I believe it is also important to maintain good relationships with neighboring cities. Regionalism plays an important role for our residents here."

Additionally, when asked to share a potential "vision statement" for Rogers-Lowell, survey respondents spoke of regional collaboration as a component of their vision for Rogers-Lowell:

*"Rogers is evolving into a pedestrian-friendly community with **strengthening linkages to the region's neighboring towns and natural beauty.**"*

*"Rogers-Lowell exemplifies the **complete connection to the region** through education, transportation, employment opportunities and community service by recognizing needs and responding with results."*

*"The city of Rogers is a charming, friendly place to live, work and visit. It boasts top-notch public schools and is **part of a thriving region** with many opportunities for all."*

These comments are revealing. While many communities across the United States are home to residents that perpetuate barriers to regionalism and wish to pursue strategies that "build walls" rather than tear them down, Rogers-Lowell area residents want to see an even greater emphasis on regional cooperation. While this theme of regionalism will be interwoven throughout this report, the primary focus of this Community Assessment is on Rogers-Lowell. The next section will examine how the community has grown and changed within the context of the larger region, establishing some basic truths before delving into other issues that influence residents' vision for an ideal future in greater detail.

GROWTH AND MIGRATION: ROGERS-LOWELL AND ITS POSITION WITHIN NORTHWEST ARKANSAS

Northwest Arkansas' rapid growth is among the greatest sources of pride and concern for residents. The growth is a sign of both progress and success, supported by what many have characterized as an attractive blend of amenities, affordability, and economic opportunity. But it has also given rise to a few significant concerns for residents: traffic, infrastructure, land use, and inclusivity among them. This rapid growth and these sources of pride and concern have been acknowledged many times before, in a variety of different studies and reports in recent years and decades. This Community Assessment does not seek to replicate that information or provide redundant insights. Rather, it seeks to establish some basic truths about the pace and manner of this growth as it relates to and impacts the community's vision for a preferred future.

In 1950, the four counties that currently comprise the Northwest Arkansas metropolitan area contained nearly 114,000 residents, just under six percent of the state's population. Over the course of the next two decades, the region's growth would begin to significantly outpace that of the rest of Arkansas. The impact of Walmart and J.B. Hunt's growth alongside Tyson Foods has been extensively documented. By 1990, the region's population had more than doubled to nearly 240,000, placing Northwest Arkansas as the 147th most populous metropolitan area in the country. Since 1990, Northwest Arkansas' population has nearly doubled once again to more than 480,000 as of 2012 (107th largest metropolitan area in the country), representing roughly 16 percent of state population.

FIGURE 1: POPULATION GROWTH (1990 – 2010)

	1990	2000	2010	Change, 1990-2000		Change, 2000-2010	
				Net	%	Net	%
Rogers-Lowell							
Rogers, AR	25,674	39,912	56,308	14,238	55.5%	16,396	41.1%
Lowell, AR	1,370	5,460	7,371	4,090	298.5%	1,911	35.0%
City Comparisons							
Springfield, MO	141,523	152,231	159,611	10,708	7.6%	7,380	4.8%
Overland Park, KS	112,498	151,705	174,110	39,207	34.9%	22,405	14.8%
Metropolitan Comparisons							
Northwest Arkansas MSA	241,478	349,532	465,776	108,054	44.7%	116,244	33.3%
Springfield, MO MSA	300,354	369,920	437,498	69,566	23.2%	67,578	18.3%
Kansas City, KS-MO MSA	1,640,951	1,842,798	2,013,864	201,847	12.3%	171,066	9.3%
National Comparison							
United States	249,622,814	282,171,957	309,326,225	32,549,143	13.0%	27,154,268	9.6%

Source: United States Census Bureau

While the region has emerged as a hub of activity within the state, the same is true for Rogers-Lowell within the region. The City of Rogers has grown from just under 5,000 residents in 1950 (4.4 percent of regional population) to more than 56,000 in 2010 (12.1 percent of regional population). Within any community, there are two primary sources of population growth: natural change (births minus deaths) and net migration (the difference between the number of residents moving into the community and the number moving out of the community). Detailed data covering the components of population change are

not available at the city-level, but information at the county-level could provide some insights into the key components of population growth in Northwest Arkansas and its component communities relative to other parts of the country. For the three-year period spanning 2010 – 2012, just 36 percent of Benton County's population growth (3,370 individuals out of 10,781 new residents) was attributed to natural change with the remaining 64 percent coming from net in-migration. By comparison, more than 76 percent of all population growth in the other 74 counties in the state of Arkansas was attributed to natural change, and just 24 percent attributed to net in-migration. More than 57 percent of all net new migrants to the state of Arkansas moved to the Northwest Arkansas metropolitan area during this period. This should come at little surprise; Northwest Arkansas has benefited tremendously from the rapid growth of its corporate headquarters, their supplier networks, and the well-educated individuals that they attract from other parts of the country. It is clear that in-migration – both domestic and international – is driving regional and county growth, and perhaps even more so in Rogers-Lowell. Although data covering the components of population growth is not available at the city-level, other data points covering trends in household size, birth rates, and marital and family status support the suggestion that growth in the City of Rogers is even more heavily driven by in-migration as opposed to natural change than the region as a whole.

Relative to the larger region and its other component communities, Rogers has a particularly large average household size. With just under three residents (2.97) in 2012, the average household in the City of Rogers is considerably larger than the average household in Northwest Arkansas (2.65) and across the United States (2.63), and even larger than what is observed in Overland Park, Kansas and Springfield, Missouri. Given the relative abundance of college students in Springfield, Missouri (home of Missouri State University) this is not a surprising finding (the average household in both Fayetteville, Arkansas and Springfield, Missouri contains just 2.14 individuals). The relatively high average household size in Rogers is also not terribly surprising given the strength of the public school system, a topic that will be covered in greater detail in subsequent sections. However, when viewed alongside another piece of information – birth rates – the data covering household size reveals something compelling: **while many communities attract singles and young married couples before they have children, families are by and large moving to Rogers *after* having children.**

Between 2010 and 2012, the average annual birth rate in the City of Rogers was just 47 births per 1,000 women aged 15 to 50. This was considerably lower than the regional and national averages (both at 54 births per 1,000 women aged 15 to 50), and lower than both comparison communities as well as the three other principal cities in the metropolitan area (Bentonville, Fayetteville, and Springdale). Combined these two indicators illustrate that the community is home to very large households on average but relatively low birth rates. The most likely explanation is that which was previously mentioned: the community is attracting families *after they have children*. Nearby Springdale is home to similarly large households but has a much higher birth rate, indicating that Springdale may be attracting more married couples *before they have children*. Bentonville is home to much smaller households (2.64) and more non-family (single, never married) households (32.4 percent vs. 29.4 percent in Rogers), indicating that Bentonville may be attracting more singles *before they marry or cohabitate*. Data covering school enrollments and the age distribution of in-migrants support these inferences.

replacing them, must be able to attract individuals from other parts of the country or world to fill those positions. Some communities face disadvantageous age dynamics but strong positive migration trends, sufficient to overcome the impending shortage associated with Baby Boom retirements. Others that are less fortunate possess disadvantageous age dynamics and face daunting trends where the rate of out-migration exceeds the rate of in-migration. Such communities will struggle in the years and decades to come, and many will be unable to overcome the attributes that have led to net out-migration. In many cases, these attributes include troubled school systems, persistent crime, and a lack of expanding existing businesses.

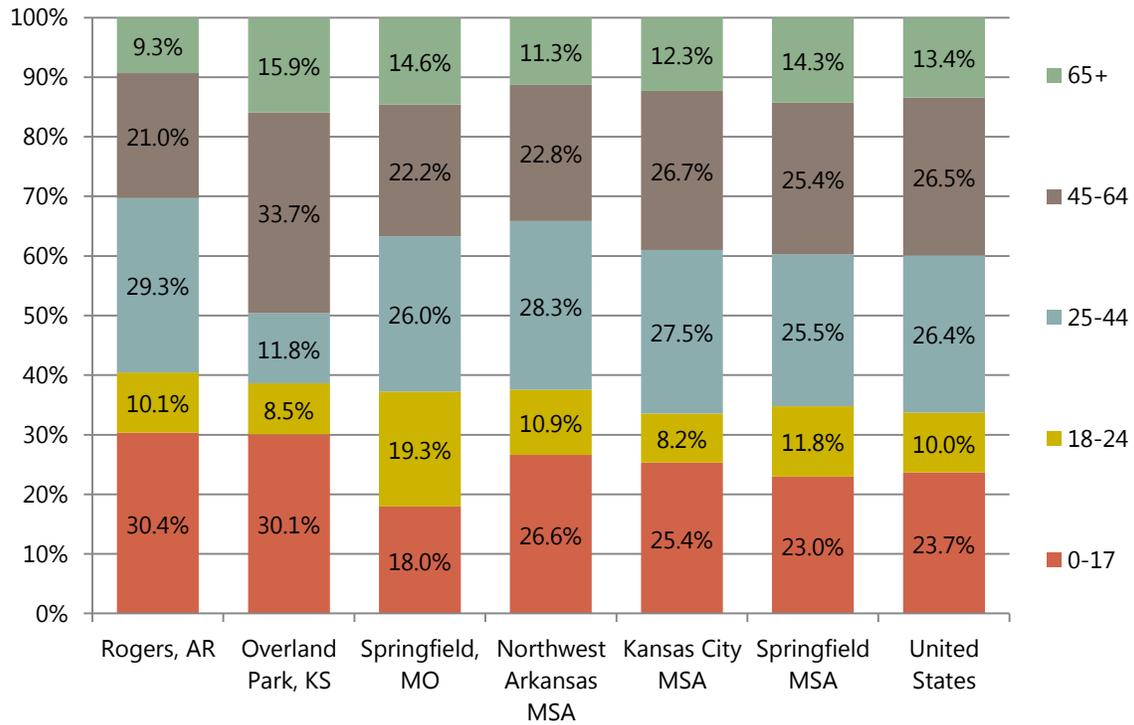
Fortunately, the Rogers-Lowell area and Northwest Arkansas are not faced with these challenges. The community and the larger region are home to large, positive levels of net in-migration and are home to a relatively young population. Further, they are not plagued by some of the challenges listed above that could lead to a reversal of migration trends.

Across the United States, the number of individuals aged 45-64 (those at or approaching retirement age in the coming decade) represent a slightly larger share of total national population (26.5 percent) than those aged 25-44 (26.4 percent) that will be expected to step in and fill more experienced positions as Baby Boomers retire. When examining those that are currently employed, 43 percent are aged 25-44, equal to the number aged 45 and up. As a nation we can partially overcome potential shortages through sustained international immigration. The same is true at the local and regional level; communities can overcome disadvantageous age dynamics with high levels of in-migration from other areas.

Relative to the average American community, the City of Rogers and Northwest Arkansas possess an advantageous age composition as it relates to workforce sustainability. Acknowledging that labor sheds for nearly every business are regional in scope, it is most appropriate to examine age composition at the regional level when considering workforce implications for businesses located in Rogers-Lowell. Very simply, the region has a larger cohort of individuals aged 25-44 than those aged 45-64, providing a strong pipeline of existing residents to fill vacated positions. And the region has proven capable of attracting new residents from other parts of the country and world to help accommodate the labor demand generated from a number of expanding businesses and new corporate relocations. That being said, there are some specific occupations for which a number of businesses engaged in the public input process reported difficulty filling. Examples of such occupations are provided in a subsequent discussion of economic composition.

With the understanding that – unlike many communities across the country – the region’s age composition does not pose a significant threat to the sustainability of its workforce, the most important consideration when examining the age composition of the City of Rogers’ population is the manner in which that composition is changing over time. And perhaps more importantly, what do these trends mean for the community’s strategic planning as it seeks to accommodate all ages and adjust to the needs of changing demographics?

FIGURE 3: AGE DISTRIBUTION (2012)



Source: United States Census Bureau

As Figure 3 illustrates, the City of Rogers is home to a relatively young population. As of 2012, only 30.3 percent of the population is age 45 or over, just shy of the 30.4 percent that is under the age of 18. No other comparison community or region comes close to sharing this composition. Children under the age of 18 represent 23.7 percent of the population in the average community nationwide, while those ages 45 and over represent just below 40 percent. Those aged 65 and over represent just 9.3 percent of the population in Rogers, a full two percentage points lower than the regional average (11.3 percent).

However, when examining the individual communities within the region, it is clear that a few communities – namely Bella Vista – are home to a relatively large portion of the region’s retiree-aged population. Nearly one third (32.2 percent) of all residents in Bella Vista are age 65 and over. The community represents just 5.7 percent of total regional population but 16.2 percent of its retiree-aged population. Bentonville, Springdale, and Fayetteville all possess a relatively small retiree-aged population as compared to Rogers, ranging from 7.5 to 8.4 percent of total population.

The data illustrate that, although retirees represent a relatively small share of total population as compared to the average American community, Rogers is a relatively attractive destination for retirees *within* the region. However, the retiree population in Rogers is not growing nearly as fast as other age cohorts, contrary to national trends. Between 2000 and 2010 it was the fastest-growing age cohort nationwide but the slowest-growing cohort in Rogers. Retirees represented just 3.6 percent of all population growth in Rogers in the last decade, as compared to 7.9 percent regionally and 17.9 percent nationwide. As a result, the percentage of the population age 65 and over declined by 2.2 percentage points in Rogers while

expanding by 0.5 percentage points nationwide. This is a regional trend, however, and does not imply that retirees are fleeing the area. Rather, it simply reflects the relative strength of the regional economy and the need to continuously import younger, working-age talent from outside the region. This is confirmed by the data: the population aged 25-44 grew by 31.5 percent and 25.5 percent in Rogers and across Northwest Arkansas, respectively, between 2000 and 2010. During the same period, the population aged 25-44 declined by 2.9 percent in the Kansas City metropolitan area and 3.3 percent nationwide.

FIGURE 4: SHARE OF TOTAL POPULATION GROWTH BY AGE COHORT (2000 – 2010)

	Under 18	18-24	25-44	45-64	65 and over
Rogers-Lowell					
Rogers, AR	29.6%	13.8%	24.0%	28.9%	3.6%
City Comparisons					
Overland Park, KS	22.7%	5.8%	27.3%	30.8%	13.4%
Springfield, MO	N/A	N/A	N/A	N/A	N/A
Metropolitan Comparisons					
Northwest Arkansas MSA	28.4%	10.3%	24.1%	29.4%	7.9%
Kansas City, KS-MO MSA	13.8%	6.8%	-10.4%	74.1%	15.7%
Springfield, MO MSA	18.1%	11.1%	8.2%	45.3%	17.4%
National Comparison					
United States	7.6%	13.8%	-11.1%	71.9%	17.9%

Source: United States Census Bureau

Not surprisingly, the impact of a rapidly-expanding, young, working-age population in Rogers and the region is a similarly rapid expansion in the population of children. The population aged 0-17 grew by 41.6 percent and 34.2 percent in Rogers and Northwest Arkansas, respectively, while growing by just 13.3 percent and 4.6 percent in the Springfield and Kansas City metropolitan areas.

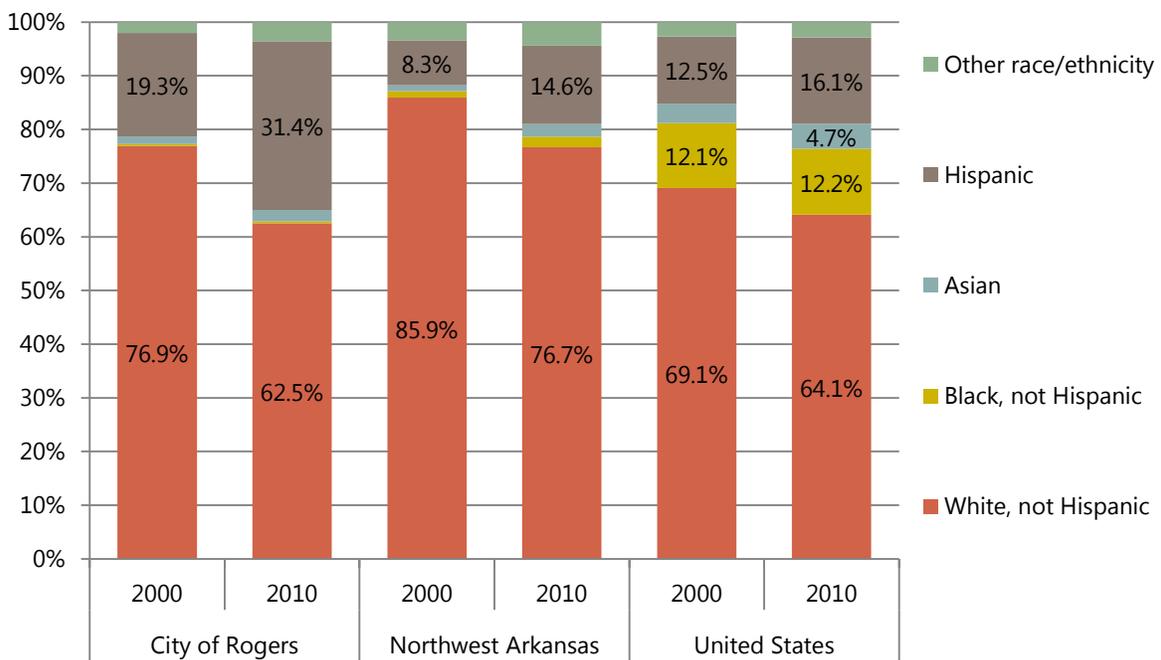
While such rapid expansion of the school-age population places a strain on public education systems and requires frequent response in a variety of ways from construction to curriculum, it is certainly an enviable challenge to have. Many communities are struggling to counteract a net out-migration of young families, a trend that creates a multitude of problems from workforce sustainability to fiscal sustainability and from school closures to business closures. The Rogers-Lowell area is quite fortunate to be in a position where it is forced to accommodate growth rather than mitigate decline. Residents acknowledge this; many of their greatest concerns relate to future growth and the investments that are necessary to support it.

THE CHANGING FACE OF ROGERS-LOWELL: DIVERSITY, INCLUSION, AND EQUITY

With an understanding that young families – those aged 25-44 and their children – are fueling growth in Rogers-Lowell, it is important to understand how the community’s racial and ethnic composition is changing. Minorities are driving population growth nationwide and the United States is steadily approaching projected majority-minority status by 2040. In 2012, and for the first time in U.S. history, the majority of babies born were non-white minorities. The pace of diversification and the balance of growth between minority groups within individual communities, regions, and states vary tremendously.

It is no secret that Northwest Arkansas is home to relatively small African American population. As of 2010, just two percent of the region’s population was African American. **Further, according to the 2000 Decennial Census, there were just 145 black residents in the City of Rogers, representing just 0.4 percent of the community’s population. By comparison, black, non-Hispanic residents represented 12.1 percent of the nation’s population and 15.5 percent of the state of Arkansas’ population in 2000.**

FIGURE 5: RACIAL AND ETHNIC COMPOSITION (2010)



Source: United States Census Bureau

Between 2000 and 2010, the African American population grew by 10.5 percent nationwide, accounting for 14.0 percent of all population growth. In Rogers, black residents accounted for just 0.4 percent of all population growth. **Although the city represents more than 12 percent of total metropolitan population, it captured just 1.2 percent of the region’s African American growth.** Bentonville and Springdale each captured roughly 17 percent of the region’s African American population growth, with Fayetteville accounting for more than 40 percent. The implication is clear: **Northwest Arkansas may not be viewed by African Americans as a place that is welcoming, inclusive, or socially enjoyable. And further, Rogers may**

be among the least attractive destinations within Northwest Arkansas for prospective future African American residents that seek close proximity to those with similar backgrounds. Resident input supported this conclusion. Employers participating in focus groups acknowledged difficulty in recruiting African American workers at all skill levels and educational backgrounds to Northwest Arkansas. Many residents – both in focus groups and via the online survey – noted that it could be quite difficult for a new African American resident to find a “social circle” and/or specific services such as hair care.

While other areas in the South and Midwest are home to more rapidly-expanding African American populations – including Overland Park and the Kansas City metropolitan area – the growth of the Hispanic population in Rogers has mirrored and actually exceeded national trends. According to the 2000 Decennial Census, Hispanics represented roughly one in five residents in the City of Rogers (19.3 percent). Just ten years later the Hispanic population had grown to nearly one in three residents (31.4 percent). During that period, Hispanics represented 60.7 percent of all growth in Rogers, far exceeding their share of growth across the region (34.6 percent) and the nation (55.2 percent). While Rogers captured a relatively small share of regional African American growth from 2000 to 2010 (just 1.2 percent), it captured nearly 26 percent of all regional Hispanic growth.

FIGURE 6: SHARE OF TOTAL POPULATION GROWTH BY RACE AND ETHNICITY (2000–2010)

	White, not Hispanic	Black, not Hispanic	Hispanic	Asian	Other Race/Ethnicity
Rogers-Lowell					
Rogers, AR	27.7%	0.4%	60.7%	3.9%	7.4%
City Comparisons					
Springfield, MO	N/A	N/A	N/A	N/A	N/A
Overland Park, KS	44.5%	10.7%	12.7%	22.4%	9.7%
Metropolitan Comparisons					
Northwest Arkansas MSA	47.2%	4.5%	34.6%	6.1%	7.6%
Kansas City, KS-MO MSA	33.6%	12.6%	36.5%	9.5%	7.8%
Springfield, MO MSA	79.2%	4.2%	8.3%	2.6%	5.7%
National Comparison					
United States	8.7%	14.0%	55.2%	16.8%	5.3%

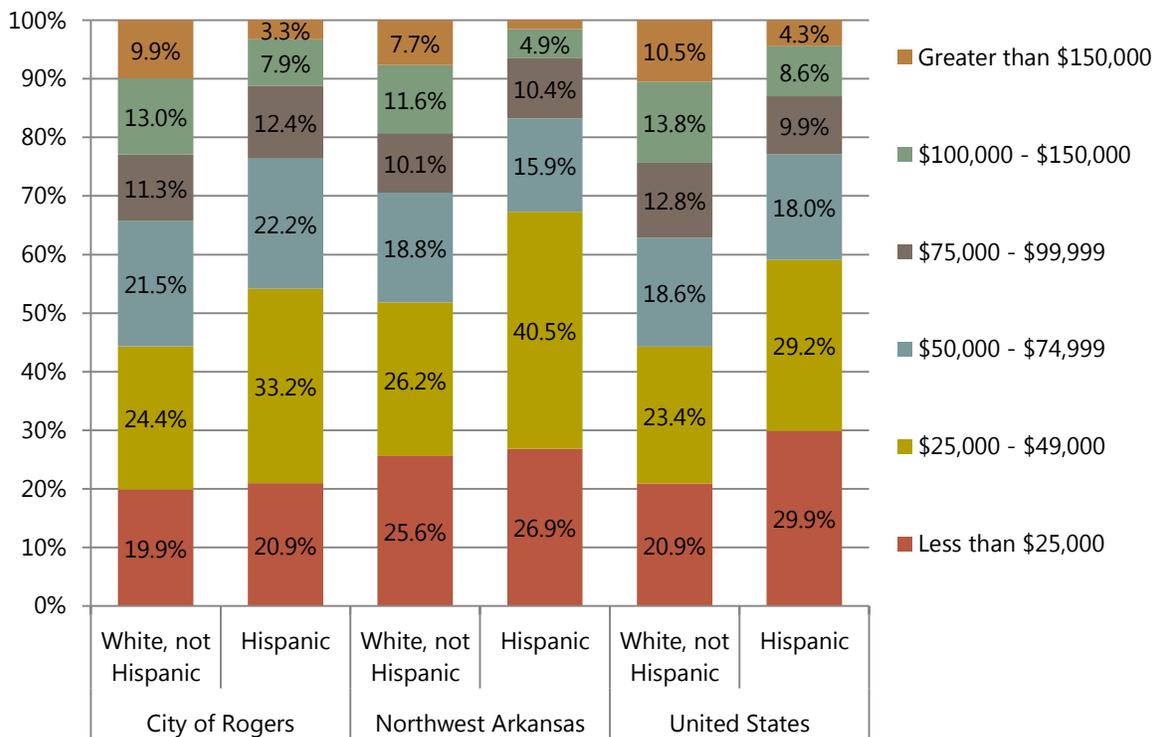
Source: United States Census Bureau

So in fact, although Rogers is rapidly diversifying, it is really becoming a community of two demographics: whites and Hispanics. Although there are some sizeable populations of Asians and other races/ethnicities such as Pacific Islanders (specifically, Marshallese) in Northwest Arkansas, much of this population is concentrated in other parts of the region, particularly Springdale. As the community continues to grow and plan for its future, it will be critical to remain focused on the needs of a rapidly-expanding Hispanic population while promoting integration and equity in a variety of areas to ensure that the community does not become spatially, socially, and economically segregated.

Certain data reveal that such segregation is already present and accelerating. According to the 2012 American Community Survey conducted by the U.S. Census Bureau, those whose primary language spoken at home is English are nearly four times as likely than Spanish speakers to have a bachelor’s degree or

higher in the City of Rogers. This gap is far larger than that which is observed in the various comparison communities and regions. At the other end of the education spectrum, 63.1 percent of Spanish speakers in Rogers have no high school diploma, as compared to 39.6 percent of principally Spanish-speaking individuals nationwide. Interestingly, those who primarily speak Spanish at home and reside in Bentonville are more highly educated than their English-speaking counterparts. **And so, not only is there socioeconomic disparity within Rogers along cultural lines, there is also geographic disparity within the region’s Hispanic community along socioeconomic lines.**

FIGURE 7: HOUSEHOLD INCOME DISTRIBUTION BY RACE AND ETHNICITY (2012)



Source: United States Census Bureau

These disparities in educational attainment have not surprisingly resulted in disparities in household income. However, despite larger gaps in educational attainment, the income gaps at various levels between Hispanics and non-Hispanic whites are not as wide in Rogers as the gaps that are observed in the comparison communities and across the nation. This implies that Hispanic households in Rogers are either more likely to have two income-earners, or their single income-earners are more likely to be employed in higher-wage occupations. Data covering occupational employment and wages is not available by race/ethnicity, but it is clear from data covering employment status by race/ethnicity and language spoken at home that Hispanics in Rogers are considerably more likely to be engaged in the workforce than their Hispanic counterparts nationwide. In 2012, the labor force participation rate for principally Spanish-speakers in Rogers was 79.2 percent vs. 70.1 percent nationwide. **Therefore, although they possess significantly lower levels of educational attainment than their counterparts nationwide, Hispanics in Rogers unquestionably benefit from access to more plentiful job opportunities in Northwest Arkansas,**

and may benefit from greater access to higher-wage opportunities relative to their educational attainment. Their labor force participation also clearly reflects their work ethic. However, despite much higher labor force participation than their Hispanic counterparts nationwide, a larger percent of Hispanics in Rogers have no health insurance (31.4 percent vs. 29.9 percent nationwide), effectively eliminating some portion of the advantage that they possess, in aggregate, in terms of income.

Residents of all races and ethnicities are well aware of the growth in the Hispanic population in Rogers. And while proud of the relatively rapid assimilation of Hispanics into the community, they are keenly aware of the potential for the aforementioned disparities to divide the community. Their vision for Rogers-Lowell is a united community – one that celebrates its diversity, supports its minority entrepreneurs, provides equal opportunity for its students, and promotes equal access to leadership opportunities.

In particular, Hispanic focus group participants and survey respondents often mentioned a desire to see more “intentional” effort from community institutions and organizations to promote leadership opportunities and develop new leaders within their community. Many cited recent elections in which numerous Hispanic candidates ran for office but none were elected. Some acknowledged that promoting voter turnout among the Hispanic community could improve chances for more elected representation, while others emphasized a need to develop better “community connections” between candidates and residents, and in some cases, more formal education and leadership development to increase the pool of qualified candidates.

Outside of elected leadership, the Hispanic community mentioned law enforcement and criminal justice as specific areas where more diverse leadership could improve the integration of and understanding between the Hispanic and white communities in Rogers-Lowell. Although exceptions exist, there seemed to be consensus that affairs between the Hispanic community and law enforcement were not a significant challenge; this is a concern that is often voiced in other communities. However, multiple individuals noted that the community would benefit from more bilingual officers and could also benefit from a “liaison” in both the police department and the court system. This was viewed as an individual(s) that “has the trust” of the Hispanic community and beyond language translation could help resolve differences or misunderstandings between government officials and Hispanic residents. It was suggested during a focus group with minority residents of Rogers-Lowell that the community considers studying those organizations and institutions that have successfully adopted diversity and inclusion programs and policies, with particular attention paid to those entities that have successfully identified and promoted qualified individuals with diverse backgrounds to both staff and board positions.

When asked if “the Rogers-Lowell area is a welcoming and inclusive place that would be attractive to a diverse set of individuals from a variety of backgrounds” just 12.2 percent of Hispanic survey respondents indicated they disagreed or strongly disagreed. This is an encouraging finding as similar surveys in other communities have revealed that between 25 and 50 percent of minorities often feel unwelcome in the community they call “home.” Furthermore, there is often a wide disparity in the opinions of minorities and white residents, with white residents often perceiving the community to be far more welcoming and inclusive than their minority counterparts. This gap in Rogers-Lowell is exceptionally small. Other survey results (such as those covering quality of life, community attractiveness, infrastructure, and amenities) and the manner in which they vary by race and ethnicity will be presented in later sections when relevant.

EDUCATION AND INCOMES: OPPORTUNITY IN NORTHWEST ARKANSAS

Education has long been referred to as “the great equalizer.” There is an abundance of evidence showing the relationship between education attainment and income. There is also an abundance of evidence illustrating the relationship between education and a variety of other outcomes that our country and communities expend tremendous government resources attempting to address: health outcomes, crime, and unemployment among them. According to the Bureau of Labor Statistics, the median wage for a high school dropout was \$24,492 in 2011 as compared to \$33,904 for a high school graduate. The unemployment rate for dropouts in the same year was 14.1 percent as compared to 9.4 percent for graduates. And according to the National Dropout Prevention Center/Network (NDPC/N), a dropout will earn roughly \$200,000 less than a graduate in their lifetime. Meanwhile, 82 percent of prisoners in the United States are high school dropouts. Given the influence of educational attainment, closing the achievement gap between various races and ethnicities may have the single greatest impact on a variety of potential and observed racial and ethnic disparities in such outcomes.

The preceding sections have examined the ways in which the community's *population* has grown and changed, highlighting the fact that young families (those aged 25-44 and their children) and both Hispanics and white, non-Hispanics are fueling growth in the community. They have also examined trends in educational attainment and incomes for Hispanics and white, non-Hispanics *within* the community, illustrating the presence of socioeconomic gaps that have emerged between the two groups. Before discussing the ways in which the community's *economy* has grown and changed, it is important to establish some basic understanding of the community and the region's competitive position in terms of its educational attainment levels, a factor that heavily influences its attractiveness to prospective new companies seeking workers at specific skill levels.

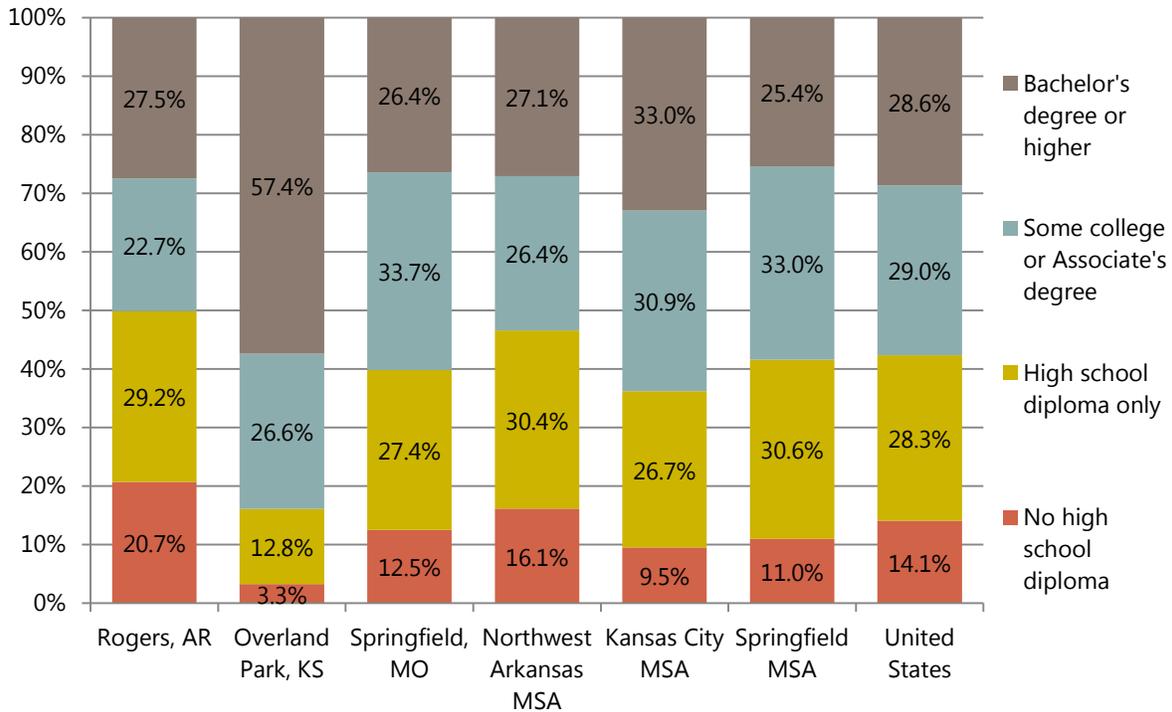
Labor sheds are regional; businesses located in Rogers-Lowell pull workers from a wide area that includes many surrounding counties. Accordingly, when examining the competitiveness of a community's workforce, site selectors frequently examine educational attainment levels and other workforce attributes for the regional labor shed. With metropolitan statistical areas and their component counties partially defined based on commuting trends, the Northwest Arkansas metropolitan area is an appropriate level of analysis. However, it is still important to understand where Rogers' residents fit within the region as their educational attainment levels reflect earning potential and their incomes reflect standards of living.

As of 2012, 27.1 percent of the region's adults (age 25 and over) possess a bachelor's degree or higher, trailing the national average of 28.6 percent. Although this exceeds the level of bachelor's degree attainment observed in the Springfield, Missouri metropolitan area, it trails the level of bachelor's degree attainment observed in other nearby metropolitan areas, including the Kansas City, Oklahoma City, St. Louis, Little Rock, Omaha, and Dallas metropolitan areas. On the other end of the spectrum, the region is home to a relatively large population with no high school diploma – considerably larger than both comparison regions.

Relative to the regional average, a slightly larger share of residents in the City of Rogers possess a bachelor's degree or higher (27.5 percent) but a significantly larger share do not have a high school diploma (20.7 percent). By comparison, Overland Park – the wealthy suburb of Kansas City that is home to many corporate headquarters including Sprint – enjoys an exceptionally well-educated populace whereby

57.4 percent possess a bachelor’s degree or higher and just 3.3 percent have no high school diploma. This partially reflects variations in the relative cost of housing but also the relative appeal of the communities in a variety of other factors. **Regardless, the data support the inferences made in the previous section: Rogers is a somewhat bifurcated community along socioeconomic lines within the region, characterized by comparatively large populations at the two ends of the educational attainment spectrum.**

FIGURE 8: EDUCATION ATTAINMENT DISTRIBUTION, ADULTS AGE 25 & OVER (2012)



Source: United States Census Bureau

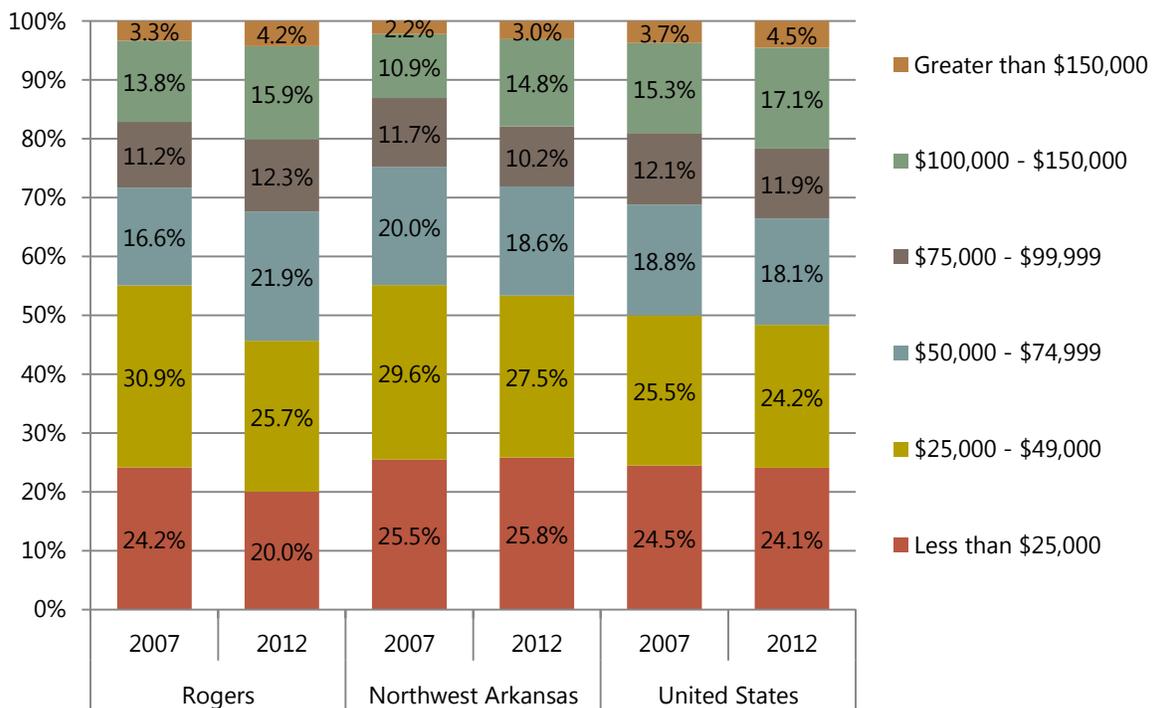
Fortunately, the data also reveal that the community and the region are gaining ground on the average American community. Between 2007 and 2012, the percentage of the population with a bachelor’s degree or higher increased by 2.9 percentage points locally and 2.4 percentage points regionally, as compared to 1.6 percentage points nationwide. The population without a high school diploma declined precipitously from nearly one in four residents (24.6 percent) to roughly one in five (the previously cited 20.7 percent). Population growth among more highly educated residents far outpaced that at the other end of the spectrum; the City of Rogers added just eight new adults without a high school diploma between 2007 and 2012. This may lead many to assume that either those in-migrating to the community are relatively well-educated and/or that a large portion of those lacking a high school diploma are moving out of the community and relocating elsewhere. However, it is clear from the data that nearly half of all growth among principally Spanish-speaking individuals was attributable to individuals with no high school diploma (49.3 percent or 740 out of 1,501 new Spanish-speaking residents). Counteracting this trend was natural population change associated with deaths of existing residents; those over the age of 65 have the lowest levels of high school diploma attainment. **The inherent point is that improvement in the average**

educational attainment level in the City of Rogers is masking what appears to be an emergence of “two Rogers.” Trends in median household income will help confirm or deny this suggestion.

So where have these improvements in educational attainment left the average resident in terms of their standards of living? With strong growth in degree attainment coupled with a relatively robust economy (to be discussed in subsequent sections), it is reasonable to assume that incomes in Rogers and Northwest Arkansas are accelerating at a decent pace as well. And with more significant improvements in educational attainment levels in Rogers than what has been observed regionally and nationwide, it may be reasonable to expect greater improvements in incomes in Rogers relative to the region and the nation.

However, when examining trends in per capita income (PCI), we see that this is not the case. The per capita income in the City of Rogers grew by just 2.3 percent from 2007 to 2012, trailing regional (6.4 percent) and national (4.6 percent) growth. There are a variety of components of income (wages, transfer payments, and investment income, primarily) and variation in any component can significantly alter income growth. Areas with relatively high levels of investment income (such as many Florida communities) suffered during the Great Recession, however, it is a different attribute in Rogers that may be the most likely explanation for comparatively low PCI growth: the relatively large share of population growth derived from those who are not earning income (children). Accordingly, it’s important to examine incomes at the household level.

FIGURE 9: CHANGE IN THE HOUSEHOLD INCOME DISTRIBUTION (2007–2012)



Source: United States Census Bureau

During the same five-year period, the median household income in the City of Rogers increased from \$45,826 to \$52,308, growing by 14.1 percent. This far exceeded the rate of growth in median household incomes across the region (3.2 percent), the nation (3.5 percent), and both comparison cities (0.1 percent in

Springfield and 0.3 percent in Overland Park). As a result, the median household income in the City of Rogers now exceeds the national median by roughly \$500, just five years after trailing the national median by more than \$4,000. **The number of households earning less than \$50,000 a year actually declined in Rogers, a trend not observed in any other comparison areas. This is a revealing finding that illustrates the upward mobility of households in the City of Rogers over the course of an otherwise difficult five-year period that closely aligns with the Great Recession.** And when considering that region's cost of living is considerably lower than the average American community (where the national average is 100, the region's cost of living index in 2013 was just 88.7 according to the Council for Community and Economic Research) it is clear that households enjoys a relative advantage in terms of their incomes' buying power.

Collectively, the data on educational attainment and household incomes illustrate that residents in the City of Rogers, and to a lesser degree across Northwest Arkansas, are getting more from less. That is to say, they are extracting more income from their set of skills (as measured by educational attainment) than the average resident in the United States. It is likely a sign that individuals in Rogers-Lowell and the larger Northwest Arkansas region are able to access stronger, better-paying opportunities relative to their educational and skill levels than their counterparts nationwide. And their opportunities for upward mobility in terms of standards of living (as measured by household income) are greater. While these are generalizations across an entire population and there are certainly exceptions, the community and region should be proud of this dynamic.

That being said, although the community and region are gaining ground on the average American community in terms of educational attainment, they will need to make more rapid improvements if they are to gain ground on their nearby metropolitan competitors within the Southeast and Midwest. Reaching the levels observed in these regions (Kansas City, Oklahoma City, St. Louis, Little Rock, Omaha, Dallas, etc.) is certainly attainable within the coming years and decades. But it will take a concerted effort to retain college graduates, re-educate workers that have lost jobs and have few marketable skills, and continue to attract well-educated in-migrants from around the country.

The University of Arkansas and Northwest Arkansas Community College are among the tremendous higher education assets in the community and region. Intentional efforts to develop more internships and continually align degree programs with the needs of employers will help promote talent retention and job placement. After all, the region will have already invested in their talent development, and with years of exposure to the region as a student, they will have experienced much that the community has to offer to a young professional and family.

But for a community and region with such aspirational residents, businesses, and community leaders, it is reasonable to ask if, in the long-term, they view surrounding metropolitan areas as their primary competition. Other rapidly-growing economies around the Southeast are home to some remarkably well-educated populations; bachelor's degree attainment in the Austin, Texas and Raleigh-Durham, North Carolina regions both exceed 40 percent. Both are attracting new jobs and young workers at an incredible pace. As the country emerges from the Great Recession and faces the retirement of the Baby Boom generation, the competition for jobs *and* talent is as strong as ever.

ECONOMIC TRANSITION IN ROGERS-LOWELL

Northwest Arkansas has been among the fastest-growing economies in the country in recent decades. The influence and impact of Walmart, Tyson Foods, J.B. Hunt, and associated supplier networks on the region's growth is well documented and widely acknowledged by residents. Aside from rapid job growth, unemployment has been historically low for Rogers-Lowell and Northwest Arkansas residents, consistently around two percentage points below the national average. **Residents also observe the change that is occurring in development patterns in Rogers-Lowell, noting that the region has become a hub of retail and professional services activity while industrial development has stagnated.** Clearly the economy of Rogers-Lowell is in transition but to what degree and how well did it weather the Great Recession?²

Between 2003 and 2013, employment at establishments located in the Rogers-Lowell area increased by 10.0 percent, trailing the rate of growth across the region (16.9 percent) but exceeding the rate observed in the comparison regions (7.6 percent and 3.3 percent in the Springfield and Kansas metropolitan areas, respectively) and across the United States (4.4 percent). However, with the exception of Northwest Arkansas, none of the aforementioned regions (including the Rogers-Lowell area) have yet to fully recoup the job losses that occurred during the recessionary period of 2007 – 2010.

When examining trends in employment and unemployment, it appears that the Rogers-Lowell area experienced a more volatile but shorter recessionary period than the average American community. Between 2007 and 2010, employment in Rogers-Lowell declined by 7.7 percent as compared to 5.3 percent nationwide. However, the Rogers-Lowell area and the Northwest Arkansas region actually reached their trough in employment earlier than the nation. The recovery of jobs based in Rogers-Lowell has been somewhat sluggish as compared to the larger region, but residents are faring well, with unemployment rates closely mirroring those of the larger region (around five percent at the start of 2014).

As a result of regional growth slightly outpacing that which has been observed within Rogers-Lowell area employers, the Rogers-Lowell area is losing ground – albeit slightly – as a jobs center within the region. This likely comes as a surprise to many who have witnessed the rapid development in around the Pinnacle Hills area and frequently cited its growth during the public process as a sign of Rogers' continued economic emergence within the region. There is no doubt that it has impacted its role as a center for retail – a topic to be discussed in greater detail – but the community as a whole has gone from containing 20.5 percent of the metropolitan area's jobs in 2003 to 19.3 percent in 2013. This is not a significant change that signals a massive shift in Rogers' economic position, but it does beg the question: "If retail is growing so rapidly, what sectors of the economy are declining? Or which sectors are not growing as fast in Rogers-Lowell as they are in other parts of the region?"

² Due to limitations in available data at the city-level, employment data presented in this section for the Rogers-Lowell area is defined using zip codes (72745, 72756, 72757, and 72758). Although these zip codes do not perfectly conform to the city limits of Rogers and Lowell, they provide a more detailed look at the economic transition taking place in Rogers-Lowell than the alternative of county-level analysis for all of Benton County. Employment is defined as all public, private, non-profit, and military employment in multi-employee establishments, in addition to "self-employment." Self-employment captures only those individuals for whom the self-employment represents their primary source of income; this does not include "extended proprietors" whose self-employment is not their primary job of income source.

Simply put, a lot has changed since 2003 in the Rogers-Lowell economy. More than 2,200 manufacturing jobs have been lost, along with nearly 3,500 jobs in the transportation and warehousing sector. Aside from a minor loss of 10 jobs in the almost non-existent mining and extraction sector, these were the only two major sectors of the economy to shed jobs during the last decade, and they did so at an incredibly rapid pace; manufacturing employment declined by 17.8 percent nationwide between 2003 and 2013 but more than 28 percent in the Rogers-Lowell area, while transportation and warehousing employment actually expanded nationwide.

FIGURE 10: EMPLOYMENT GROWTH AND EARNINGS BY MAJOR SECTORS (2003 – 2013)

Sector	Rogers-Lowell Area				United States		
	Jobs (2003)	Jobs (2013)	Net Jobs Change (03-13)	% Jobs Change (03-13)	Avg. Earnings (2013)	% Jobs Change (03-13)	Avg. Earnings (2013)
Agriculture, Forestry, Fishing and Hunting	50	73	23	46.0%	\$31,969	-3.0%	\$30,975
Mining, Quarrying, and Oil/Gas Extraction	26	16	-10	-38.5%	\$26,467	62.3%	\$111,156
Utilities	18	40	22	122.2%	\$85,364	-3.9%	\$132,404
Construction	2,700	2,871	171	6.3%	\$43,442	-10.3%	\$54,289
Manufacturing	7,957	5,706	-2,251	-28.3%	\$49,556	-17.8%	\$76,860
Wholesale Trade	806	1,069	263	32.6%	\$85,268	1.9%	\$78,385
Retail Trade	3,638	6,345	2,707	74.4%	\$28,437	0.9%	\$32,978
Transportation and Warehousing	9,122	5,672	-3,450	-37.8%	\$58,240	6.4%	\$58,149
Information	318	393	75	23.6%	\$52,099	-15.3%	\$97,724
Finance and Insurance	1,053	1,070	17	1.6%	\$72,251	-1.1%	\$104,625
Real Estate and Rental and Leasing	457	477	20	4.4%	\$43,725	-3.4%	\$51,870
Professional, Scientific, and Technical Services	1,381	2,468	1,087	78.7%	\$58,976	19.4%	\$89,577
Management of Companies and Enterprises	906	1,301	395	43.6%	\$126,937	23.1%	\$128,886
Admin., Support, and Waste Mgmt. Services	1,422	1,624	202	14.2%	\$37,799	10.8%	\$39,034
Educational Services (Private)	307	552	245	79.8%	\$22,528	25.9%	\$42,488
Health Care and Social Assistance	2,889	4,424	1,535	53.1%	\$45,609	22.8%	\$54,442
Arts, Entertainment, and Recreation	402	469	67	16.7%	\$23,209	12.3%	\$35,543
Accommodation and Food Services	2,656	4,574	1,918	72.2%	\$17,618	16.9%	\$20,712
Other Services (except Public Administration)	1,686	2,020	334	19.8%	\$22,489	5.2%	\$28,169
Government	2,658	3,313	655	24.6%	\$53,970	1.5%	\$64,135
Total, all sectors	40,452	44,477	4,025	10.0%	\$45,782	4.4%	\$57,286

Source: Economic Modeling Specialists, Inc.

Note: See footnote #2 for important information regarding geographies and employment coverage.

Meanwhile, more than 2,700 new retail jobs were created in the Rogers-Lowell area over the course of the last decade. The majority of those jobs (more than 1,600) were created between 2005 and 2007, coinciding with the opening of Pinnacle Hills Promenade in 2006. During the decade, the Rogers-Lowell area's retail employment growth represented roughly 50 percent (49.4 percent) of all regional retail employment growth, and more than 65 percent of all retail employment growth in Benton County. As a result, retail employment in the Rogers-Lowell area now represents more than 25 percent of all retail employment in the Northwest Arkansas metropolitan area, up from 18.7 percent in 2003. And as of 2013, retail sales per capita in the four zip codes that are used to define the Rogers-Lowell area were \$4,559 per person, as compared to the regional and national averages of \$3,474 and \$4,121, respectively.

The growth in retail has been followed closely by growth in the complementary accommodation and food service sector. More than 1,900 new jobs were added in accommodation (260 new jobs) and food service (1,657 new jobs). Health care and social assistance – the only major sector to continue to add jobs nationwide during the Great Recession – added over 1,500 new jobs in Rogers-Lowell, expanding at a pace (53.1 percent) that far exceeded the national rate of expansion (22.8 percent).

The fact that retail, food service, and health care employment is growing rapidly in an area with similarly rapid population growth is not surprising; these are primarily local and regional-serving sectors that are not highly export-oriented. That is to say, they primarily recycle income within Northwest Arkansas and attract very little income from businesses or residents outside of the region. Of course, there are a few exceptions, principally the impact of travelers and tourists who frequent the community's restaurants and retail establishments. There are also undoubtedly a number of individuals in surrounding, more rural areas that seek specialized health care treatments in Northwest Arkansas. However, these sectors are not as export-oriented as goods-producing and goods-moving industries that manufacture and distribute products all over the country and world. Nor do they attract as much income (revenue) from businesses located outside the region as many other professional, financial, scientific, and technical services. Export-oriented sectors produce more value, and through exports outside the region, create new wealth inside the region. The value created by these sectors is typically reflected in higher wages. While some manufacturing occupations pay relatively low hourly wages and may not provide benefits, there is a common misconception that manufacturing jobs are "low-wage" on average. This could not be further from the truth: in 2013, the average annual earnings (wages, salaries, and employer-contributed benefits and supplements) for a manufacturing worker in the United States were \$76,860, nearly \$20,000 higher than the average for all sectors (\$57,286). Although manufacturing earnings in Rogers-Lowell are considerably lower than the national average, they remain nearly \$4,000 above the community's average for all sectors.

Meanwhile, the average annual earnings for a retail trade employee in Rogers-Lowell are \$28,437. The average annual earnings for an employee in the accommodation and food service sector are \$17,618. Looking at specific lower-wage occupations within these sectors in Rogers-Lowell, cashiers earn \$9.15 per hour on average; waiters and waitresses earn \$9.65 per hour; hotel clerks earn \$9.89 per hour; cooks in all restaurants earn \$9.94. By comparison, the two largest manufacturing occupations in the community, food processing workers and team assemblers, earn \$12.33 and \$14.63 per hour, respectively. Tractor-trailer truck drivers earn \$18.91 per hour and shipping/receiving clerks earn \$16.03 per hour. Although these are not high-wage manufacturing occupations, they pay considerably higher wages than the most common occupations in the retail, food services, and accommodation sectors. **So while it is necessary to have available jobs in the community for all different skill levels, it is important to illustrate that those jobs in primarily local- and traveler-serving sectors (retail, food service, and accommodation) are no substitute for jobs lost in manufacturing and transportation/warehousing sectors.**

And so, the implication of the changing economic structure in Rogers-Lowell area is clear: **residents are delighted to have more shopping and dining options nearby**, but these new jobs are primarily low-wage. Although they are creating little new wealth in *the region as a whole*, they are unquestionably attracting expenditures from residents *within the region* and providing great value to the community of Rogers-Lowell from a tax revenue standpoint.

Fortunately, retail and food service are not the only growing sectors within Rogers-Lowell. It was previously mentioned that health care services is also expanding rapidly, and like retail, is drawing expenditures from residents located outside the city limits. Employees in the health care sector earn roughly the same average annual earnings as the average for all sectors in the community. Nearly every community in the country is struggling to keep pace with the demand for new workers in the health care sector and Northwest Arkansas is no exception. An emphasis on developing new workers to meet ever-increasing demand on top of retiree replacement will be critical. The growth of UAMS-Northwest is important, but output from the campus alone will be insufficient to meet the needs of the region's employers. Further, many of the most in-demand health care occupations do not require four-year or advanced degrees. A strong pipeline of certificates and associate's degrees in a variety of nursing, radiological, therapeutic, and technical health care positions from NWACC and other institutions will be vital to the sustainability of the health care workforce in Rogers-Lowell and Northwest Arkansas.

The same is true for manufacturing skill sets. Although the sector is declining, **representatives from manufacturers in the community that participated in public input sessions noted difficulty finding qualified employees in a variety of positions, including but not limited to machinists, toolmakers, electronic and electrical technicians, and skilled trades.** Part of the challenge facing manufacturers is the fact that the manufacturing workforce in the United States is relatively old and the sector will face greater difficulty replacing a larger number of retirees than most sectors in the years to come. Compounding the challenge is the fact that many young people are not interested in careers in manufacturing, a fact that is often perpetuated by misconceptions that all manufacturing facilities are "dirty" and that all manufacturing positions are "low wage" and require little to no skills. This certainly is not always the case. **In addition to workforce concerns, manufacturers expressed some concern that the community was more focused on developing retail and amenities to support its quality of life than on the needs of existing and potential future manufacturers in support of its economic development. They also struggle to fight perceptions at the state-level that "Northwest Arkansas doesn't need any help" and that it "has all the corporate headquarters and therefore doesn't need any manufacturing investment."**

While manufactures are struggling to find qualified employees locally, some other sectors are having little trouble attracting new talent from outside the region. Rogers-Lowell has added nearly 1,100 new professional, scientific, and technical services jobs in the last decade, growing at a rate (78.7 percent) than is nearly four times that of the average community nationwide (19.4 percent). A large portion of these jobs (264 jobs) is classified as "computer systems design," supporting the large corporate presence that exists in the region. However, an even larger portion (670 jobs) is classified within the "advertising and public relations" subsector, an area that likely captures the advertising and sales functions of certain Walmart vendors as establishments are classified according to the primary function of the business unit (or establishment) rather than the corporate entity (or firm). Growth in the wholesale trade sector (263 jobs created between 2003 and 2013) captures much of the other vendor-related growth in the area. Average earnings in the professional, scientific and technical services sector and the wholesale trade sector are roughly \$13,000 and \$39,000 above the average for all jobs in Rogers-Lowell, respectively. This highlights the impact and relative value of the Walmart vendor network and the presence of other corporate headquarters such as Tyson Foods and J.B. Hunt to the local workforce and economy.

Finally, how has the observed growth and decline in the aforementioned sectors compared to that of the rest of Northwest Arkansas? How is Rogers-Lowell's position within the region changing? Figure 11 illustrates the change in jobs in the Rogers-Lowell area as a share of all jobs in Northwest Arkansas for key sectors from 2003 to 2013. Very simply, the areas that were fast growing have increased in prominence in Rogers-Lowell, and the areas that were declining have done so at a pace that exceeded the regional rate of decline (or growth).

FIGURE 11: ROGERS-LOWELL AREA, SHARE OF NORTHWEST ARKANSAS JOBS BY SECTOR (2003–2013)

Sector	Rogers-Lowell Area Share of Northwest Arkansas Jobs (2003)	Rogers-Lowell Area Share of Northwest Arkansas Jobs (2013)	Percentage Point Change in Share (03-13)
Agriculture, Forestry, Fishing and Hunting	1.3%	2.2%	0.8%
Mining, Quarrying, and Oil/Gas Extraction	18.7%	10.4%	-8.3%
Utilities	2.2%	4.5%	2.3%
Construction	22.5%	24.0%	1.4%
Manufacturing	23.0%	21.0%	-1.9%
Wholesale Trade	12.5%	12.0%	-0.5%
Retail Trade	18.7%	25.5%	6.8%
Transportation and Warehousing	54.9%	37.3%	-17.7%
Information	12.9%	19.5%	6.6%
Finance and Insurance	20.3%	22.1%	1.9%
Real Estate and Rental and Leasing	18.5%	18.8%	0.3%
Professional, Scientific, and Technical Services	20.8%	23.2%	2.4%
Management of Companies and Enterprises	5.9%	5.7%	-0.2%
Admin., Support, and Waste Mgmt. Services	18.7%	19.2%	0.6%
Educational Services (Private)	16.3%	16.8%	0.6%
Health Care and Social Assistance	18.7%	19.1%	0.5%
Arts, Entertainment, and Recreation	22.3%	18.7%	-3.6%
Accommodation and Food Services	20.6%	23.7%	3.1%
Other Services (except Public Administration)	21.5%	22.4%	0.8%
Government	11.3%	11.3%	0.0%
Total, all sectors	20.5%	19.3%	-1.2%

Source: Economic Modeling Specialists, Inc.

Note: See footnote #2 for important information regarding geographies and employment coverage.

As previously mentioned, retail employment in Rogers-Lowell has grown to represent more than 25 percent of all retail employment in the four-county Northwest Arkansas metropolitan area, up from just 18.7 percent ten years ago. The Rogers-Lowell area's share of regional accommodation and food services employment has grown by 3.1 percentage points. But other areas are increasing in prominence too: professional services, finance and insurance, information services (which includes print media, telecommunications, and data processing/hosting), and health care are all relatively high-wage sectors that have seen their prominence rise in Rogers-Lowell relative to the rest of the region. **Very simply, the community is cementing its status as an anchor for retail, accommodation and food services, and professional services. It is losing ground as a center for manufacturing and transportation/warehousing, although it remains a key anchor for the latter given the immense presence of J.B. Hunt.**

Although some residents acknowledged that the half-cent sales tax would fund some critical improvements, they were still persistent in their assertions that traffic was one of the community’s most significant issues to address. Some individuals that had recently relocated to Rogers-Lowell from outside the Northwest Arkansas region felt that traffic was not a significant issue relative to the areas where they previously lived. **In many ways, the data covering commute times support these assertions that traffic in Rogers-Lowell and Northwest Arkansas may not actually be as significant as many perceive it to be.**

FIGURE 13: CHANGE IN COMMUTE TIMES, WORKERS AGE 16 AND OVER (2007–2012)

	<u>Mean Travel Time to Work (minutes)</u>			<u>% of Workers w/ 30+ Minute Commute</u>		
	2007	2012	Change	2007	2012	Change
Rogers-Lowell						
Rogers, AR	16.3	16.8	0.5	13.3%	14.6%	1.3%
City Comparisons						
Overland Park, KS	19.6	20.6	1.0	20.0%	22.2%	2.2%
Springfield, MO	18.3	17.0	-1.3	15.1%	11.5%	-3.6%
Metropolitan Comparisons						
Northwest Arkansas MSA	21.1	21.0	-0.1	27.9%	24.7%	-3.2%
Kansas City, KS-MO MSA	22.6	22.7	0.1	30.5%	30.1%	-0.4%
Springfield, MO MSA	22.1	21.6	-0.5	26.8%	25.7%	-1.1%
Statewide Comparisons						
Arkansas	20.8	21.3	0.5	25.8%	26.1%	0.3%
National Comparison						
United States	25.1	25.5	0.4	35.0%	35.7%	0.7%

Source: United States Census Bureau

As of 2012, the average commute for residents of the City of Rogers was just 16.8 minutes, lower than the average commutes in all comparison areas. The average commute time for Rogers’ residents was nearly five minutes lower than the regional average, four and half minutes lower than the statewide average, and nearly nine minutes lower than the national average. Across Northwest Arkansas, the average commute is no worse than the average commute across the state, and is shorter in time than the average commute for those who work in the Kansas City and Springfield metropolitan areas. When examining the percentage of workers whose commutes are 30 minutes or longer, the differences are even more pronounced. Just 14.6 percent of all Rogers-Lowell residents experienced a commute of 30 minutes or longer in 2012, well below the regional, state, and national averages. That being said, commute times actually seem to be improving regionally but have become slightly longer for Rogers-Lowell residents in the last five years.

Regardless of what the data say, the perception exists that traffic is a problem. And if traffic is among residents’ greatest concerns in a community where commute times are considerably lower than the average American community, this speaks volumes about how truly successful the community and larger region have been in meeting the other needs of their residents. As this strategic planning process for Rogers-Lowell moves forward, it is clear that the community will need to establish a new set of priorities for transportation projects within the cities of Rogers and Lowell, in addition to projects of regional significance. This is of utmost importance to residents. And while the development of a complete transportation plan for the community is outside the scope of this process, the identification of top priorities – both short-term and long-term – is certainly a necessary component.

When mentioned by focus group participants, the New Technology High School was typically discussed within the context of two issues: first, preparing a skilled workforce for STEM-related occupations and second, providing options for families that enhance the attractiveness of Rogers Public School relative to surrounding districts. Recall that survey respondents who previously lived in Rogers-Lowell but recently chose to relocate elsewhere frequently mentioned Bentonville Public Schools as a primary reason for their relocation. Although the survey received hundreds of responses specifically from individuals that had relocated from Rogers-Lowell, very few individuals provided specific information as to why they perceived Bentonville Public Schools to be more attractive than Rogers Public Schools. Of those who did provide explanations, a few things were repeated more than once: graduation rates, the International Baccalaureate program (also available in Springdale), and opportunities/resources for special needs students.

Although some seemed almost fearful that Rogers Public School could lose its status as a premier school district, others acknowledged that the district had taken some important steps in recent decades and years to preserve and enhance the quality of instruction, facilities, and resources for specific groups (such as ESL students). Others, particularly Hispanics, indicated that the district could do more for ESL students and their families, with more bilingual teachers and administrators, and translators to help improve parental involvement within schools. Regardless of race and ethnicity, most residents agreed that more parental involvement in schools was necessary, a finding that is common in many communities across the country. Others noted that greater involvement from the business community and other community organizations would be a welcome addition, both inside and outside of the classroom. That being said, exactly 75 percent of survey respondents agreed or strongly agreed with the statement that “community and business leaders have a commitment to quality, public K-12 education.” Just 5.6 percent disagreed or strongly disagreed. The results for teacher and administrator commitment were almost identical.

Many residents highlighted the fact that some intra-regional movement among families was inevitable, and that this was an asset for the region; families have an abundance of quality choices for public education in Northwest Arkansas. As one individual noted, “A family relocating to Northwest Arkansas *could* make their decision about where to live within the region based on schools, but they wouldn’t *have* to.” This is not the case in many regions across the country where there is wide variation in school quality across jurisdictional borders, heavily influencing migration patterns within the region, effectively creating winners and losers in terms of growth. Northwest Arkansas and all of its individual communities are fortunate to have such strong school systems. That being said, it must be acknowledged that some individuals who recently relocated to Northwest Arkansas from other parts of the country noted that, like traffic congestion, one’s perception of school quality is always relative to their past experiences and place(s) of previous residence.

During the process of creating a new Regional Economic Development Strategy for the Northwest Arkansas Council and its numerous partners in community, economic, and workforce development, “Educational Excellence” was identified as one of four key goals within the region’s strategy. While there are many specific recommendations within this pillar, there was an emphasis on developing more career-focused and project-based learning within traditional school and through the creation of career academies. The New Technology High School is without question an important step towards meeting this need. Other issues identified and addressed in the strategy included but were not limited to a reduction in the remediation rate for students graduating from area high schools, as well as elevation of the region’s graduation rates.

A variety of studies have found that the percentage of students entering four-year institutions requiring remedial education ranged from 25 percent to 40 percent, with remediation rates at two-year community and technical colleges often much higher, between 35 and 60 percent. Across the state, nearly 50 percent (48.7 percent) of high school graduates in 2012 required some remedial education. Roughly 37 percent of those graduating from Rogers Public Schools required remedial education, up from 34.9 percent in 2010.

FIGURE 15: KEY PERFORMANCE INDICATORS, ROGERS PUBLIC SCHOOLS (2012)

	Rogers Public Schools	State of Arkansas
Percent of Students Scoring "Proficient or Advanced" on End of Course Testing		
Literacy, 3rd grade	90.5%	81.5%
Math, 3rd grade	94.5%	86.9%
Literacy, 8th grade	90.6%	80.3%
Math, 8th grade	78.7%	68.6%
EOC Algebra I	85.0%	79.1%
EOC Biology	48.2%	44.1%
Literacy, 11th grade	78.3%	68.7%
Other Indicators of Student Performance and Outcomes		
Composite ACT score	22.2	21.0
Graduation rate	82.7%	84.1%
Dropout rate	1.4%	2.4%
College remediation rate	37.2%	48.7%
Financials		
Mills	38.4	37.7
Expenditures per student	\$8,416	\$9,379
Teacher Attributes		
Average teacher salary	\$55,781	\$49,946
% of teachers w/ a master's degree or higher	48.5%	40.4%
% of teachers completely certified/accredited	98.7%	98.2%
Other School System Attributes		
% of schools considered a "school of excellence"	85.0%	43.6%

Source: Arkansas Department of Education

Although remediation rates have actually risen slightly in the district over the last two years, the graduation rate has improved, rising from 80.2 percent to 82.7 percent. However, greater improvements in graduation rates were made across the state and the graduation rate in Rogers Public School now trails the state average for Arkansas. This is a surprising finding given that student performance on end of course testing at every level is higher, and in many cases considerably higher, than what is observed across the state. Perhaps the most encouraging indicator of future graduation rates (which measure a four-year cohort) is the downward trend in dropout rates (which measure the percentage dropping out in a single year).

In recent years the school district has implemented its strategic plan – "Rogers Public School: From Good to Great" – with much success. An initial focus on improving the quality of instruction through adoption of new methods and greater investment in professional development has been complemented by a focus on the use of data to inform future strategic efforts. The district's strategic plan updates have highlighted in recent years that a greater focus will now be placed on improving graduation rates, following the investment in improved instruction. A continued commitment to soliciting and responding to parental and student input will be critical to the successful implementation of a strategic plan that is well-informed and constantly mindful of the changing needs of families and students in Rogers-Lowell.

QUALITY OF PLACE: COMMUNITY APPEAL TO VARIOUS GROUPS

This Community Assessment has previously discussed a variety of factors such as school quality, traffic and transportation infrastructure, and job opportunities, all of which help define quality of place and influence quality of life in Rogers-Lowell. However, many other factors influence a community's attractiveness and the quality of life enjoyed by its residents. This section discusses some of these attributes, namely: amenities, recreation, crime, and housing, in the context of residents' vision for the future.

In summary, although many residents praised the community's amenities, particularly shopping and dining options, they lamented the relative lack of nightlife for both adults and youth. They are delighted by their access to nature and recent developments in cultural amenities; they look forward to planned improvements at Lake Atalanta and feel fortunate to be so proximate to a world-class institution like Crystal Bridges Museum of American Art. They are anxious to see a more vibrant downtown Rogers, a topic that will be discussed in greater detail in the following section. Residents also enjoy a relatively affordable single-family housing stock but acknowledge that a relative lack of apartments and condos may inhibit the area's attractiveness to potential new residents that are either unable to afford or not interested in a single-family home purchase. And last but not least, residents feel safe in the community and in their schools, but the data indicates that the incidence of certain crimes is rising faster than population growth.

While these statements reflect the general consensus, what appeals to one segment of the community (such as retirees or families) may not appeal to other segments (such as young professionals or singles). Figure 16 displays the average ratings provided by survey respondents in a variety of different age groups for key quality of life considerations. A rating of "excellent" is assigned a value of 4.0, a rating of "good" is assigned a value of 3.0, and so forth, with a rating of "poor" assigned a value of 0.0. This results in an average rating that is akin to a grade point average (GPA).

FIGURE 16: SURVEY RESULTS – AVERAGE RATINGS, ATTRIBUTES INFLUENCING QUALITY OF LIFE

	Report Card (All Ages)	Younger than 18	18-24	25-44	45-64	65 or older
Availability of volunteer opportunities	B+	2.44	2.38	2.74	2.92	3.27
Sense of personal and property safety	B+	2.47	2.74	2.81	2.83	2.85
Diversity of quality of dining options	B+	2.65	2.55	2.70	2.86	3.17
Affordability and overall cost of living	B+	2.34	2.58	2.79	2.71	2.90
Diversity and quality of retail options	B	2.39	2.36	2.61	2.78	3.08
Availability of quality healthcare services	B	2.36	2.62	2.62	2.67	2.92
Recreational amenities	B	2.37	2.03	2.37	2.60	2.83
Diversity of housing options	B	2.40	2.42	2.43	2.40	2.44
Quality development, planning, and land use	B	2.35	2.31	2.34	2.26	2.32
Aesthetic appearance of the community	B	2.29	2.29	2.35	2.27	2.20
Availability of quality rental housing	B-	2.24	1.93	2.08	2.05	2.16
Entertainment and cultural amenities	C+	2.11	1.11	1.73	2.15	2.49
Traffic and congestion	C	1.94	1.43	1.41	1.33	1.18
Nightlife options for adults	C	1.96	0.74	1.13	1.44	1.65
Nightlife options for youth and young adults	C-	1.50	1.04	1.07	1.27	1.32

Source: *Market Street Services*; Rogers-Lowell Area Community Survey (2014)

Rating scale: 0=poor; 1=below average; 2=average; 3=good; 4=excellent. This system produces average ratings akin to a GPA on a 4.0 scale. Color coding: Average ratings are shaded along a spectrum from green (highest rating) to red (lowest rating) for ease of interpretation.

With few exceptions, the different age groups have very similar perceptions of the community's strengths and weaknesses from a quality of life standpoint. That is to say, within their age group, their evaluations of different factors relative to one another produce similar rankings of strengths and weaknesses. The availability of rental housing, traffic conditions, and nightlife options are viewed by all age groups to be the community's greatest weaknesses from a quality of life standpoint. They view volunteer opportunities, personal safety, overall cost of living, and dining and retail options as the greatest strengths.

However, perhaps the most interesting aspect of Figure 16 is the fact that, as you move up the age spectrum (from younger to older) for a single attribute, it is evident that older residents provide more favorable ratings to nearly every factor than their younger counterparts, particularly for those attributes viewed as community strengths. Variability in ratings within an age group across all factors also increases as you move along the age spectrum (from younger to older).

SAFETY AND CRIME: As previously mentioned, residents overwhelmingly feel safe in Rogers-Lowell. In fact, over two days of focus groups crime was only mentioned once. It was never mentioned among the list of potential deterrents to a family considering relocation to Rogers-Lowell. Figure 17 displays trends in property and violent crime rates for the City of Rogers, its two comparison cities, and the nation from 2002 to 2012. Data for each year is provided to help illuminate trends over time, understanding that a small change in the number of *incidents* of violent crime in a relatively small community can create comparatively large fluctuations in the *rate* of crime between years.

FIGURE 17: CRIME RATES, PROPERTY AND VIOLENT (2002–2012)

	<u>Property Crime Rates (per 10,000 residents)</u>				<u>Violent Crime Rates (per 10,000 residents)</u>			
	Rogers, AR	Springfield, MO	Overland Park, KS	United States	Rogers, AR	Springfield, MO	Overland Park, KS	United States
2002	370.7	716.1	211.5	363.1	20.1	69.0	16.7	49.4
2003	444.7	813.3	N/A	359.1	16.3	68.4	0.0	47.6
2004	536.1	805.2	292.2	351.4	19.9	56.2	20.5	46.3
2005	581.0	837.6	279.2	343.2	21.0	58.7	30.3	46.9
2006	515.3	869.3	273.6	334.7	20.7	66.1	20.0	47.9
2007	431.6	951.2	252.1	327.6	17.2	69.8	18.4	47.2
2008	339.8	935.7	238.1	321.5	25.0	68.9	17.7	45.9
2009	367.2	894.4	259.5	304.1	31.2	76.4	17.7	43.2
2010	365.2	954.0	241.4	294.6	39.3	83.3	16.7	40.5
2011	406.3	900.7	230.1	290.5	39.0	81.6	16.6	38.7
2012	362.0	901.1	230.3	285.9	35.0	99.2	16.1	38.7
Net Change (2002-2012)	-8.6	185.0	18.9	-77.1	14.9	30.1	-0.6	-10.7
% Change (2002-2012)	-2.3%	25.8%	8.9%	-21.2%	74.3%	43.6%	-3.4%	-21.7%

Source: Federal Bureau of Investigation

As of 2012, the property crime rate in the City of Rogers is higher than the average American community and more than 50 percent higher than the property crime rate in Overland Park, Kansas but considerably lower than the rate observed in Springfield, Missouri. However, property crime has trended downward in Rogers, following a period of relatively high property crime in the mid-2000s. This mirrors a downward

trend nationwide. Over the ten-year period, property crime has declined by just 2.3 percent; this is due to the rapid ascent that occurred from 2002 – 2006. However, what is most interesting and most admirable is the fact that property crime in Rogers has declined substantially since 2006, by nearly 30 percent. Again, this mirrors trends observed in the comparison communities and across the nation, but it is important to note a substantial event that occurred in Rogers in 2006: the opening of Pinnacle Hill Promenade. The addition of major new retail centers often leads to a spike in property crimes in communities across the country as shopping centers are frequently among the loci for property crime.

Violent crime, however, has been on the rise in Rogers since 2008, driven almost entirely by a rise in aggravated assaults. This coincided with a period during which the opposite trend was observed nationwide, with violent crime declining substantially since 2008. It is plausible that crime and personal safety are not on the top of many residents' minds simply because many of those participating in public input are not victims of that crime and/or do not observe such crime in their neighborhoods. Crime is highly localized, as police departments are well aware. It will be important for community leaders to monitor the intra-city incidence of crime to ensure that the community does not develop "pockets of crime" that inhibit the attainment of broader community objectives such as revitalization and equity in quality of life. Interestingly, there is very little variation in opinions of personal safety along racial/ethnic lines among survey respondents.

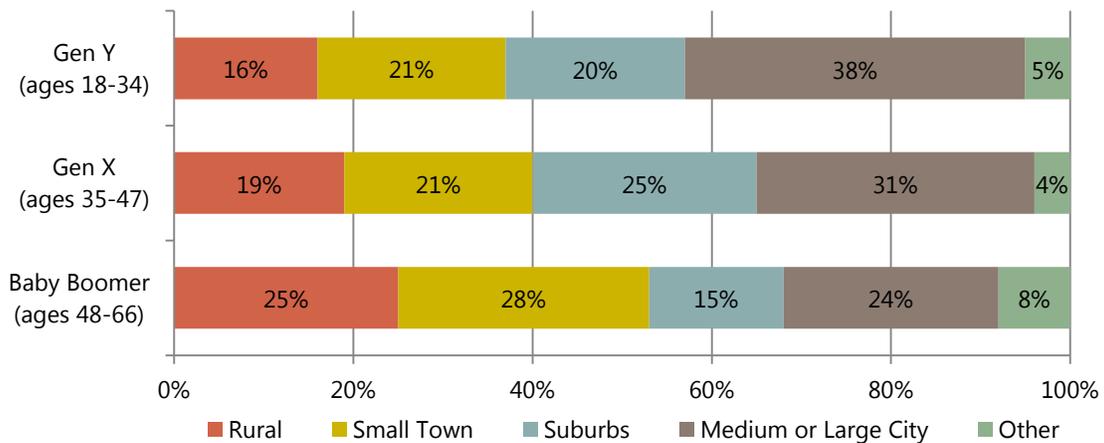
NATURE AND RECREATION: The proximity of Rogers-Lowell to nature – specifically, a variety of different state parks, national forests, and Beaver Lake – was frequently cited by residents during the public input process. Without question, the surrounding natural environments provide the community with a tremendous quality of life advantage relative to many other parts of the country. And within the region, the community's most proximate access to Beaver Lake was cited as a feature that influenced many individuals' choices to live in Rogers-Lowell. While the surrounding areas were oft-mentioned, Lake Atalanta and its future as a hub for recreational activity were among the frequently discussed examples of specific developments and investments that residents were anxious to see in the years to come. It's potential to attract tourists and support the vibrancy of downtown Rogers were viewed as positives, in addition to the obvious recreational benefits to residents. The Razorback Greenway and the community and region's full complement of trails were also frequently mentioned. Upon completion the Razorback Greenway will be an immense asset for a region of Northwest Arkansas' size.

With regards to parks and recreation, residents were pleased with the development of the community's aquatics center and the addition of some new athletic fields (most notably the Regional Sports Park and its baseball/softball fields), but some also bemoaned a change in policy that, according to residents, has restricted free public use of school facilities (fields). The need for more soccer fields was mentioned in a few focus groups and throughout the online survey; it was an area of particular interest to Hispanics whom indicated that the current capacity was barely capable of supporting local demand and insufficient to support any larger youth tournaments that could be a source of traveler expenditures in Rogers-Lowell.

ENTERTAINMENT AND NIGHTLIFE: Without question, the relative appeal of the community to young professionals, singles, and recent college graduates was among the most frequently discussed topics during focus groups. These discussions largely centered on entertainment options and nightlife. The abundance of comments from focus groups participations and survey respondents related to these issues

could compile a separate report. Suffice it to say, a key component of residents' vision for Rogers-Lowell in 2020 and beyond is the development of a more attractive set of entertainment and nightlife amenities. When focus group participants were asked the question, "Suppose you had a friend that was a young professional or recent college graduate and they were considering relocation to Rogers-Lowell, what would you tell them?" the response within nearly every focus group and among the majority of participants was "I'd tell them to go to Fayetteville or Bentonville." Some of those indicating that they had recently relocated from a larger city outside of Northwest Arkansas felt that the entertainment options were particularly lacking, and that a concentration of such amenities is what attracted them to a larger community in the first place.

FIGURE 18: PREFERENCES REGARDING PLACE OF RESIDENCE AMONG U.S. RESIDENTS (2013)



Source: Urban Land Institute; national survey of 1,202 adults conducted January-February 2013

Residents frequently indicated that the community didn't have a "gathering place" for young professionals, or a geographic concentration of entertainment and nightlife options that would allow an individual to both live and play in the same area, and potentially live, work, and play. Many indicated that the Pinnacle Hills area and downtown Rogers were "all that we have" but did not meet the aforementioned criteria except for perhaps a handful of people. A lack of live music venues was cited, and although there is excitement for the opening of the Arkansas Music Pavilion ("The AMP"), this was not viewed as a substitute for smaller venues that support local musicians and residents' desire for a casual night out.

Both parents and high school students indicated that there were not enough safe options for young children and teenagers outside of bowling and the movie theater. Some emphasized a more critical need for *free* activities. Collectively, residents simply want more places to have fun in Rogers-Lowell. And they frequently mentioned that density of complementary amenities was critical. While the region has some diverse and dense areas of dining and shopping, these were not seen by residents as being complemented by bars, music venues, and other nightlife, such as performing arts venues or event spaces.

HOUSING: Another key consideration for existing and potential future residents of all ages is the affordability and availability of different types of housing. While many young families relocating to Rogers-Lowell are ready and able to purchase a single-family home, many are seeking rental housing and many prefer apartments, condominiums, and loft-style living arrangements where they are surrounded by a

larger and denser social community. Residents of all ages frequently mentioned the affordability of single-family housing as an advantage for Rogers-Lowell. The data support this assertion: in 2012, the ratio of the median priced single-family home to the median household income (a standard measure of affordability) was quite low in the City of Rogers, signaling that the existing housing stock is particularly affordable relative to income in the community.

FIGURE 19: SELECTED HOUSING CHARACTERISTICS (2012)

	Rogers, AR	Overland Park, KS	Springfield, MO	Northwest Arkansas	United States
Affordability of Single-Family Housing					
Median Household Income (2012)	\$52,308	\$70,592	\$32,359	\$46,172	\$51,771
Median Single-Family Home Price (2012)	\$145,100	\$222,400	\$107,800	\$141,600	\$174,600
Ratio of Median Home Price to Median Income	2.77	3.15	3.33	3.07	3.37
Types of Housing: Rental vs. Multi-Family					
% of Occupied Housing Units, Renter-Occupied	40.4%	34.0%	52.3%	37.0%	35.3%
% of Occupied Housing Units, Multi-Family	18.6%	28.2%	30.3%	20.0%	25.0%
% of Rental-Occupied Units, Multi-Family	46.1%	83.1%	57.9%	54.0%	70.9%

Source: United States Census Bureau

However, many residents mentioned that there was a relative lack of available apartments that may be attractive to recent college graduates or recently-relocated young professionals seeking to rent before purchasing a home. The data illustrate that Rogers-Lowell is actually home to relatively abundant stock of rent-occupied housing (40.4 percent of all units vs. 37.0 percent across the region and 35.3 percent nationwide). The relatively high number of renter-occupied units in Springfield, Missouri reflects the presence of numerous higher education institutions, most notably Missouri State University, and their large number of rental-seeking students. But Rogers-Lowell is home to a relatively small number of multi-family units (18.6 percent of units vs. 20.0 percent across the region and 25.0 percent nationwide). This indicates that the community's rental housing stock is primarily single-family, contrary to the composition of multi-family housing in all comparison areas and across the nation. The provision of rental units, particularly multi-family rentals, is not simply of interest to young people. As Baby Boomers retire, there will be a large number of older residents seeking new and different housing arrangements to meet their needs. According to the Census Bureau and the Joint Center for Housing Studies, the number of renter households aged 55-64 increased by 80 percent between 2002 and 2012 across the United States, far outpacing the growth of population in this cohort. So not only is the country facing significant growth in its retiree-aged population, it is also facing a shift in the preferences of this older demographic towards rental housing. Accordingly, provision of adequate, attractive, and affordable rental housing is of great importance to communities that seek to attract recent graduates while also allowing their older residents to happily age in place.

COMMUNITY AESTHETICS AND REVITALIZATION: Although not as frequently discussed as some other issues mentioned throughout this report, community aesthetics, beautification, and redevelopment needs came up in nearly every focus groups and were mentioned regularly among the area's challenges on the community survey. There was general feeling that the community and many of its neighborhoods and key corridors could benefit from stronger code enforcement, fewer above ground utilities, and more trees and flowers (streetscaping). Others mentioned storefronts and facades that need updating.

