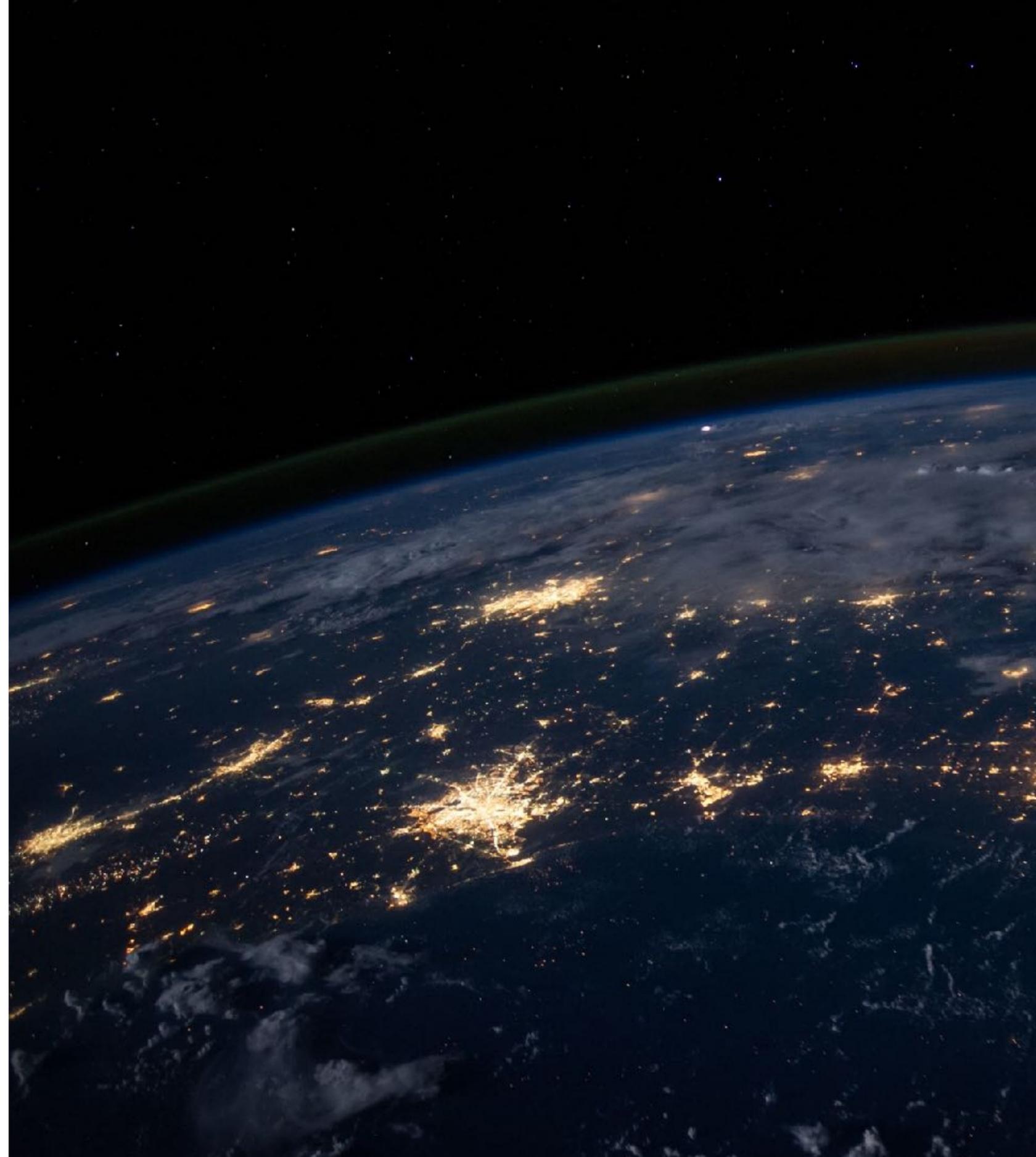




Millennials, Generation Z, and Northwest Arkansas

Focus groups of Gen Z Teens (13-18) in NW Arkansas and nationwide surveys of 1,000 Americans age 13-23 (Generation Z) and 1,000 Americans age 24-39 (Millennials) - Fall 2020 and January 2021



About This Report

During the Summer of 2020 and Spring of 2021, in the midst of a global pandemic and protests around racial justice, The Walton Family Foundation embarked upon a study of what young Americans thought about their own futures: their prospects for success, what they want out of life, and what they fear will stand in their way.

As part of the Walton Family Foundation's work in its home region, Northwest Arkansas, they also sought to understand how Generation Z and Millennials talk about where they want to live and why - in their own words. During May 2021, they commissioned three focus group discussions with teenagers aged 13 through 18 living in Northwest Arkansas to cover these topics.

This report synthesizes the findings of those original nationwide research efforts with the focus groups to better illuminate what kinds of communities Millennials and Generation Zers - particularly those in Northwest Arkansas - seek to create.

In this report, all survey results are from nationwide surveys conducted June 2020 and January 2021.

Focus group results are specifically of young voices in Northwest Arkansas from May 2021.

Your Ideal Community



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We asked focus group respondents: ideally, where would you like to live? What would that place look like? What would it value?

Northwest Arkansas teenagers told us:

- A place that is walkable and tight-knit**
- A place that provides a wide range of opportunities**
- A place that values teamwork, diversity, and creativity**

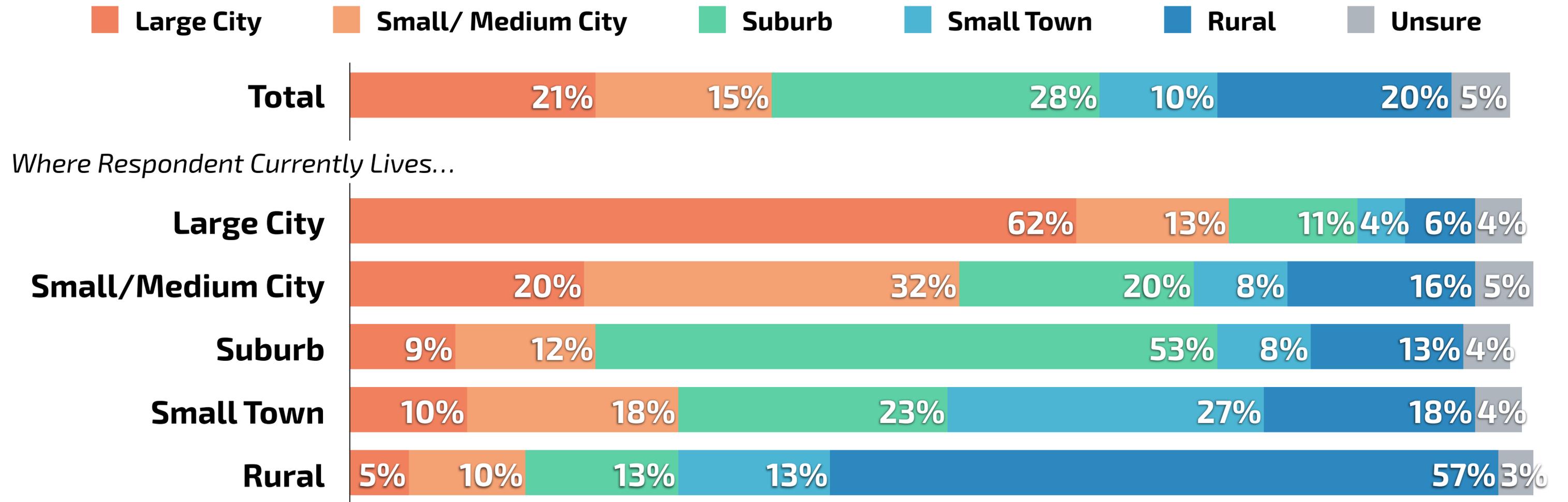
A scenic view of a Swiss village with a river, mountains, and a church tower. The image shows a peaceful town with traditional European architecture, including a prominent church tower with a red roof. The town is situated along a calm river that reflects the surrounding greenery and buildings. In the background, there are lush green mountains and a snow-capped peak under a clear blue sky. The overall atmosphere is serene and picturesque, typical of a desirable living location.

Our respondents named places like Switzerland, Utah, Canada, Montana, and major cities like Berlin and Chicago as desirable places to live.

Attractive attributes included outdoors space and natural beauty, good government policy, ability to access enjoyable activities.

Giving The Choice Of Living Anywhere, Most Gen Zers And Millennials Would Choose An Area Similar To Their Current One

Q. If you had the ability to live anywhere you wanted, how would you describe the ideal area in which you would want to live? (JAN 2021)



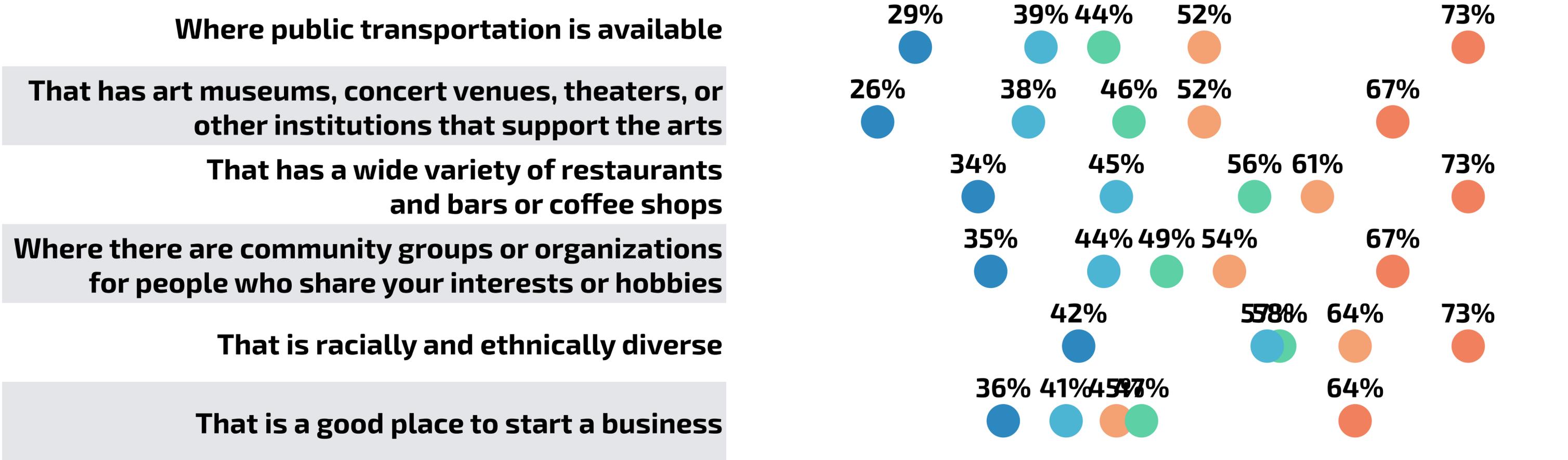
Those Who Want To Live In More Urban Areas More Likely To Say It's Important To Have Things Like Public Transportation, Arts Institutions

Q. If you had the ability to live anywhere you wanted, how important would it be to you to live in a community . . . ? (JAN 2021)

% Extremely or Very Important

Among Those Whose Ideal Community Type Is . . .

● Rural ● Small Town ● Suburb ● Small/Medium City ● Large city



Our participants were generally split over whether they preferred to live somewhere more dense or more spread apart, but value the ability to be closer to things like parks and stores, and felt it was important to be able to easily get around without a car.

“As much as I'd like a lot of space, maybe somewhere rural at some point in my life, I do now appreciate being closer to things. I could see myself loving each of them...I do appreciate being close to different things to get around...I see the pros in each.” - Noah (17/18)



Northwest Arkansas Gen Z Values Walkability and Bikeability For Environmental and Community-Building Reasons

Environmental and Health Benefits

“Plus just being able to walk and ride scooters or bikes or skateboards around places, **it's also that healthy way to live.** Get in exercise every day. That's what I prefer.” - Steven (17/18)

“I think just having things be closer together and cutting down on drive time, it **helps save money and it's more environmentally friendly.**” - Summer (17/18)

“My dream situation [is] where I can live in the city and **be so close to people and really be involved in the community** and then be able to cycle out and go on a gravel road.” - Laura (13/14)

Community Benefits

“So I think that it'd be more **environmentally beneficial** just because whenever people are packed in more closely, there's less need for cars and cars are a major contributor to global warming and climate change. And that's a big thing, but I also **like the idea of the community that that fosters.**” - Fiona (15/16)



Affordable Housing, Jobs In Chosen Field Are Top Factors

Q. If you had the ability to live anywhere you wanted, how important would it be to you to live in a community . . . ? (JAN 2021)

% Extremely or Very Important



They felt the best places to live are places where schools are inclusive, tight-knit and woven into the local community.

They want schools to offer students the ability to build a wide range of skills - good STEM education, diverse electives, and teaching practical life skills.



Northwest Arkansas Gen Z Values Practical Skills and A Strong Sense of Community in Schools

Skill Building

“One thing that I think school should focus on more so is practical things...I think that a lot of high schoolers leave high school not knowing anything about how to do your taxes or how to do practical things...you should be ready to enter the workforce...” - Ashwin (17/18)

Community Integration

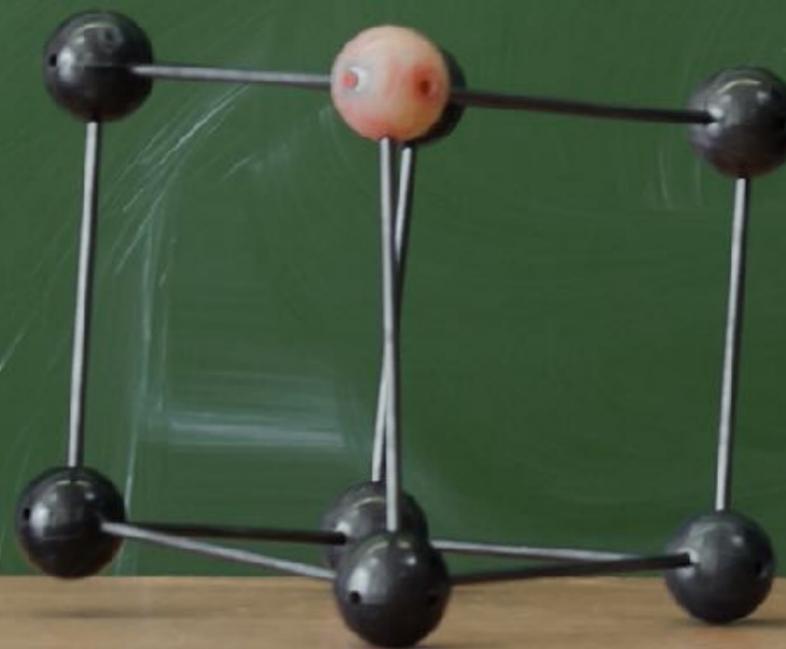
“I think a big thing that is important, to me at least, is that schools are good at incorporating the community around it into its events and stuff like that. I think being a community point that hosts events and has fun things going on outside of just kids going to school every day.” - Anna (15/16)

“I liked the smaller environment because I can get to know more people and I can get to know my teachers a lot better, and it's easier to go to people for things...a smaller, more tight knit school that's more focused on like actual STEM and English and stuff rather than a ton of electives is what I'd look for.” - Abigail (13/14)



While our younger respondents felt too far removed from adulthood to be thinking a lot about careers, our older teenage respondents had a wide range of interests and wanted to live in a place where they could pursue careers as varied as video game design, nursing, cybersecurity, and museum curation.

They wanted to live in a community where lots of different jobs are available so that they could also gain exposure to hands-on experiences with those careers (via internships, volunteer experiences, partnerships with local community colleges, etc.)



Many said they could imagine wanting to start a business some day - but acknowledged it is no easy task.

The benefits of entrepreneurship included being “in control” and offering an outlet to pursue one’s passions for a career.

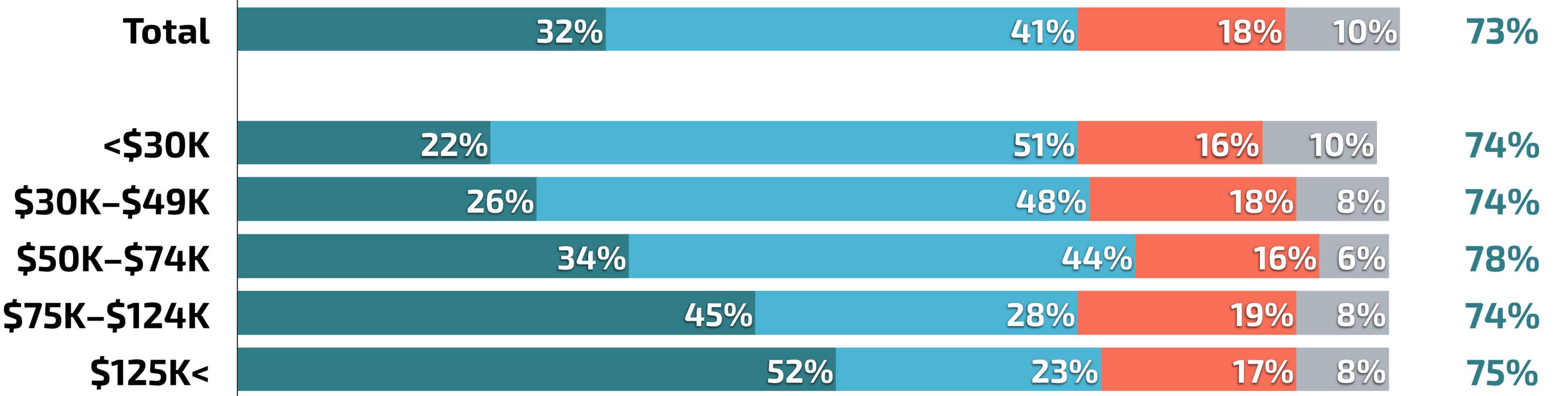
It was harder to articulate what might make somewhere a place that is particularly good for starting a business, however.



More Than 7 In 10 Interested In Starting Own Business, But Those With Lower Incomes Less Confident They Could Get Necessary Resources

Q. Would you ever want to start your own business, and if so, do you think you would be able to get the financial resources you would need to do so? (JAN 2021)

- Yes, I would want to, and I think I would be able to get the financial resources I would need
- Yes, I would want to, but I do NOT think I would be able to get the financial resources I would need
- No, I would not ever want to start my own business
- Unsure

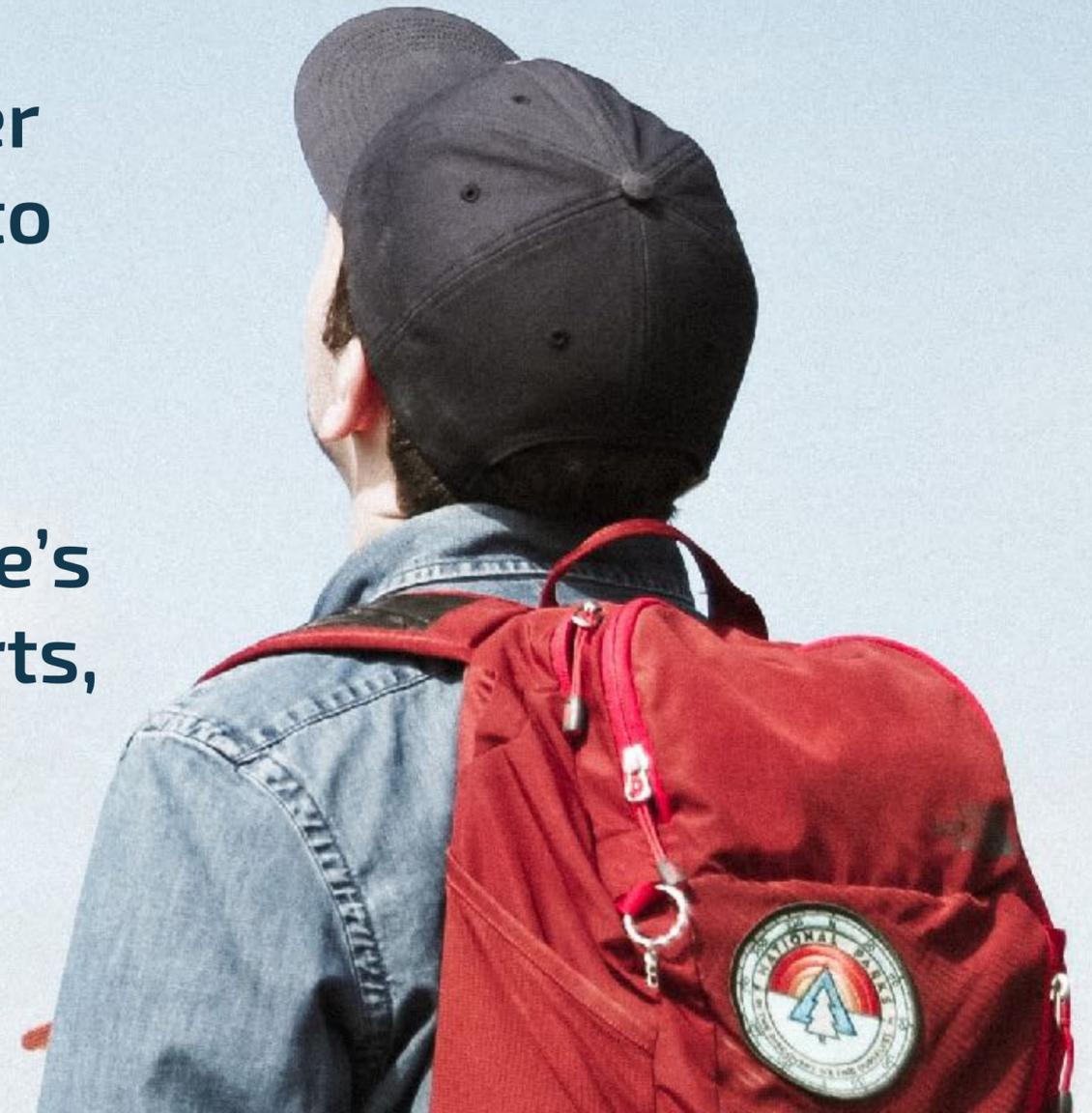


We asked what values they want their ideal community to embody and found a number of key themes:

Diversity and inclusivity: being respected and respectful, able to live alongside those of different cultures, races, and walks of life.

Togetherness and teamwork: places that offer the ability for people to help one another out, to cooperate, to band together in smaller groups based on shared interests.

Creativity and originality: being able to be one's authentic self, in a place that celebrates the arts, trying new things



We wanted to know how they felt about diversity and inclusion and what makes communities a good embodiment of those values. Our teenage respondents said:

"I feel like in my community it's important to be diverse and no matter what your race, sexuality, religion is because in the community, **if everybody's just the same, it's going to be boring and we're not going to get anything done.** And I feel like it's also important to respect each other's diversity or it's not going to be compatible in a happy and joyful place to live." - Kenlee (13/14)

"I think one of the most important things for a community to be able to be diverse is **just simple open-mindedness and willingness to listen** to other cultures and learn from other cultures, because I think that's kind of what makes a group inclusive, is to be able to listen and learn from each other, and it doesn't matter really what the culture is. You just have to be able to learn." - Summer (17/18)

"I think that if you have a community that there's no specialty, but there's a place for everyone, then **people can feel more encouraged to find their niche** and start their own business or say, "Hey, I don't see myself in this community, I'm going to start my own business, that way I can." And I think that having that diversity in every aspect is important if you want to consider being an entrepreneur in a community." - Fiona (15/16)

Living in Northwest Arkansas



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Most of the Northwest Arkansas teenagers we spoke with said they did feel they'd be able to build the life they wanted if they stayed in the region.

And when asked if it is a place where it is easy to live an enjoyable life, almost all said yes.



Most of our respondents were positive about Northwest Arkansas.

And yet, though not universal, most of our teenaged respondents said they expected they would live somewhere else after they finished their education.

Those who said they expected to stay often cited family and community ties as a reason why. Some noted that while they thought they might move away as young adults, they could imagine returning and putting down roots. And most felt that Northwest Arkansas was ahead of the rest of the state in terms of culture, economy, development and inclusivity.

For those who expected to leave, reasons tended to fall into three categories:

- Dissatisfaction with the area/not feeling it is a fit
- Pursuing opportunities that likely involve moving elsewhere
- Wanting to experience something new

Similar To What We Heard From NW Arkansas Teens, Most Want To Put Down Roots Somewhere, But Not Always Near Where They Grew Up

Q. Even if none of these are exactly right, which of the following do you agree with more? (OCT 2020)

- I would like to put down roots near where I grew up
- I would like to put down roots somewhere, but not near where I grew up
- I would like to move around a lot during my lifetime
- Unsure



68% Want to Put Roots Down



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Those Who Want To Stay Say The Area Is “Homey”; Some Who Say They Would Move Away Can See Themselves Returning

Family and A Sense of Place

“Well, I think I'd probably stay here because...mostly because I **have family here and a lot of friends and I already know the place pretty well.** So I guess it'd be easier to get around, too.” - Nora (13/14)

“I just like how **Northwest Arkansas is homey.** And it also has so many things that you can do...I feel like we do have some work to do...I feel like **this is going to be a really good state to live in.**” - Kenlee (13/14)

A Place To Return To For Putting Down Roots

“I moved here with my mom and I kind of want to stay here. There's a lot in the Fayetteville area, **there's a lot of opportunity** and I enjoy it.” - Laura (17/18)

“While I would love to go live somewhere else, I would not put it out of the question, maybe halfway through my life, after living in another place for a decade or two coming back because **I would love to leave here and come back** and see how it's changed.” - Noah (17/18)



Those Who Want To Leave Have Few Problems With NW Arkansas Itself, Simply Want To Try Something New

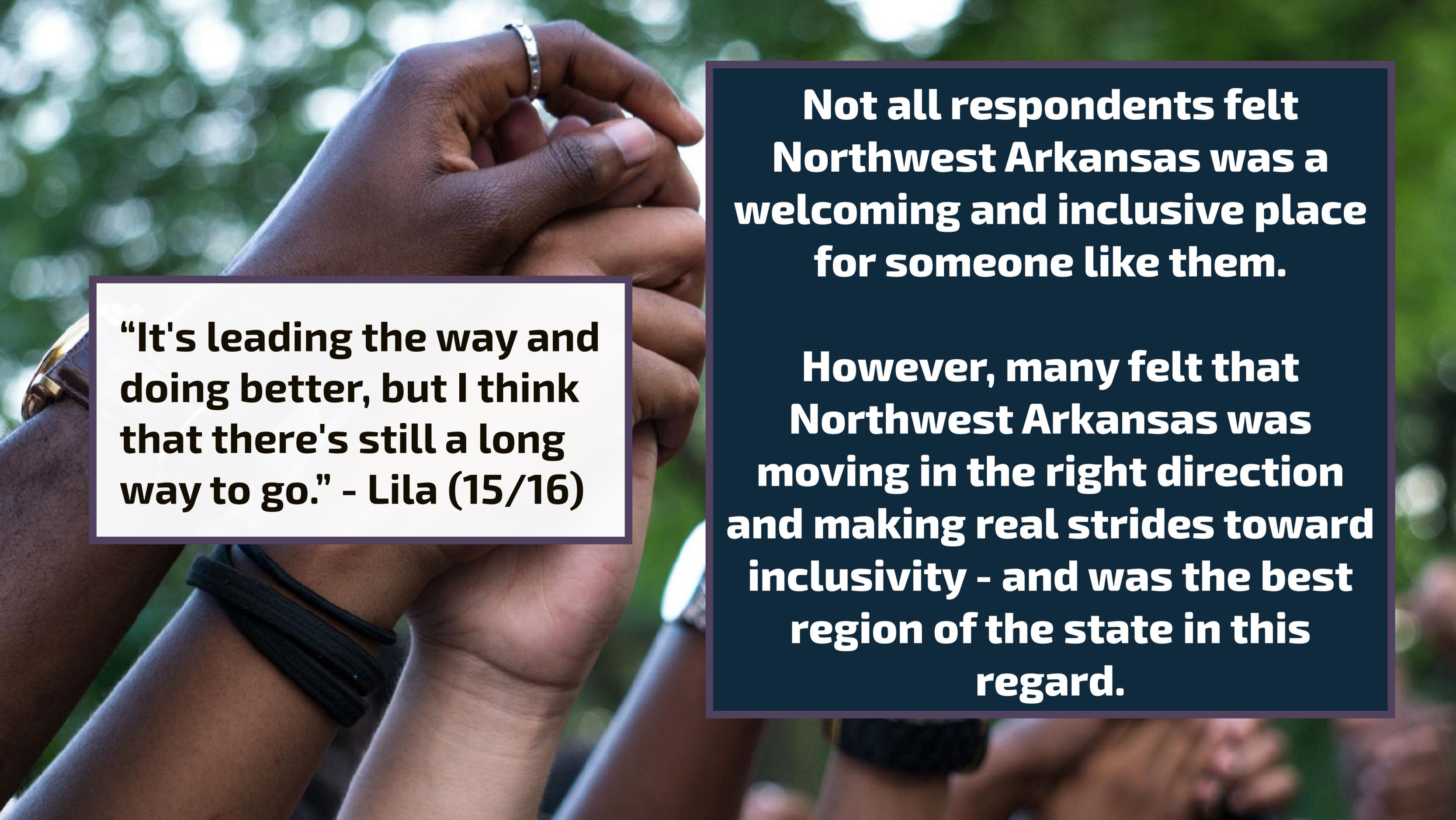
New Experiences

“I think I wouldn't want to stay here because I have been here my whole life. And I feel like I would want to just go somewhere else and **experience other things and other places**, and just meet more people and just be around a different environment.” - Addison (13/14)

“I would probably **want to go to college somewhere else**. And I might go here and I think it just be really cool to experience more of the world than just Northwest Arkansas. I've lived here my whole life. And so I would love to go and see more of the world. **I could possibly come back after traveling**, but I would love to live in a lot of other places and see different parts of the world. “ - Lila (15/16)

Career or College Opportunities

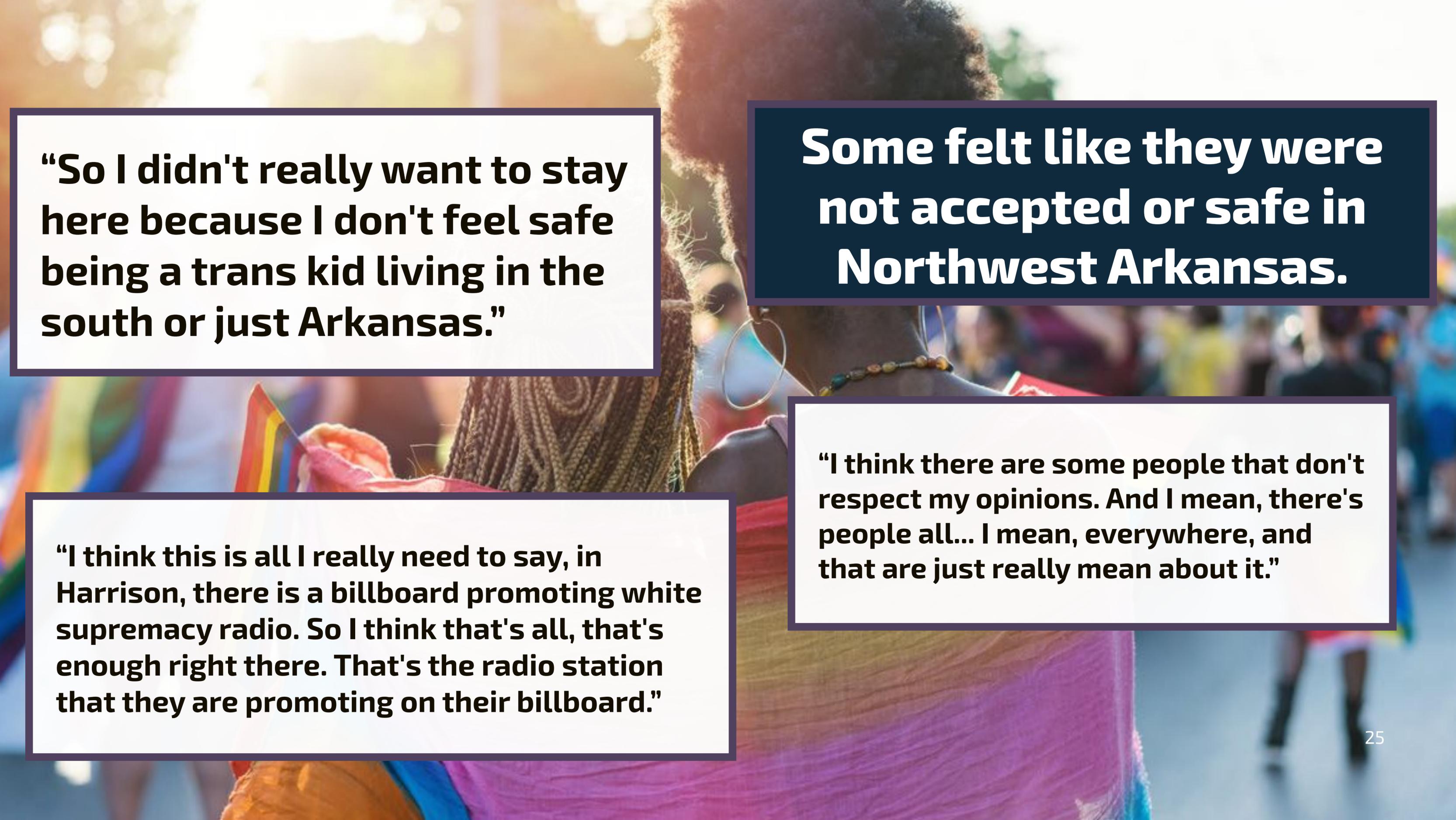
“I have lived here my whole life...I think I **would want a fresh start with some new people and some new opportunities** and then also I do want to go into software engineering and I think that like the hubs for that are kind of there in Austin.” - Karina (17/18)



“It's leading the way and doing better, but I think that there's still a long way to go.” - Lila (15/16)

Not all respondents felt Northwest Arkansas was a welcoming and inclusive place for someone like them.

However, many felt that Northwest Arkansas was moving in the right direction and making real strides toward inclusivity - and was the best region of the state in this regard.

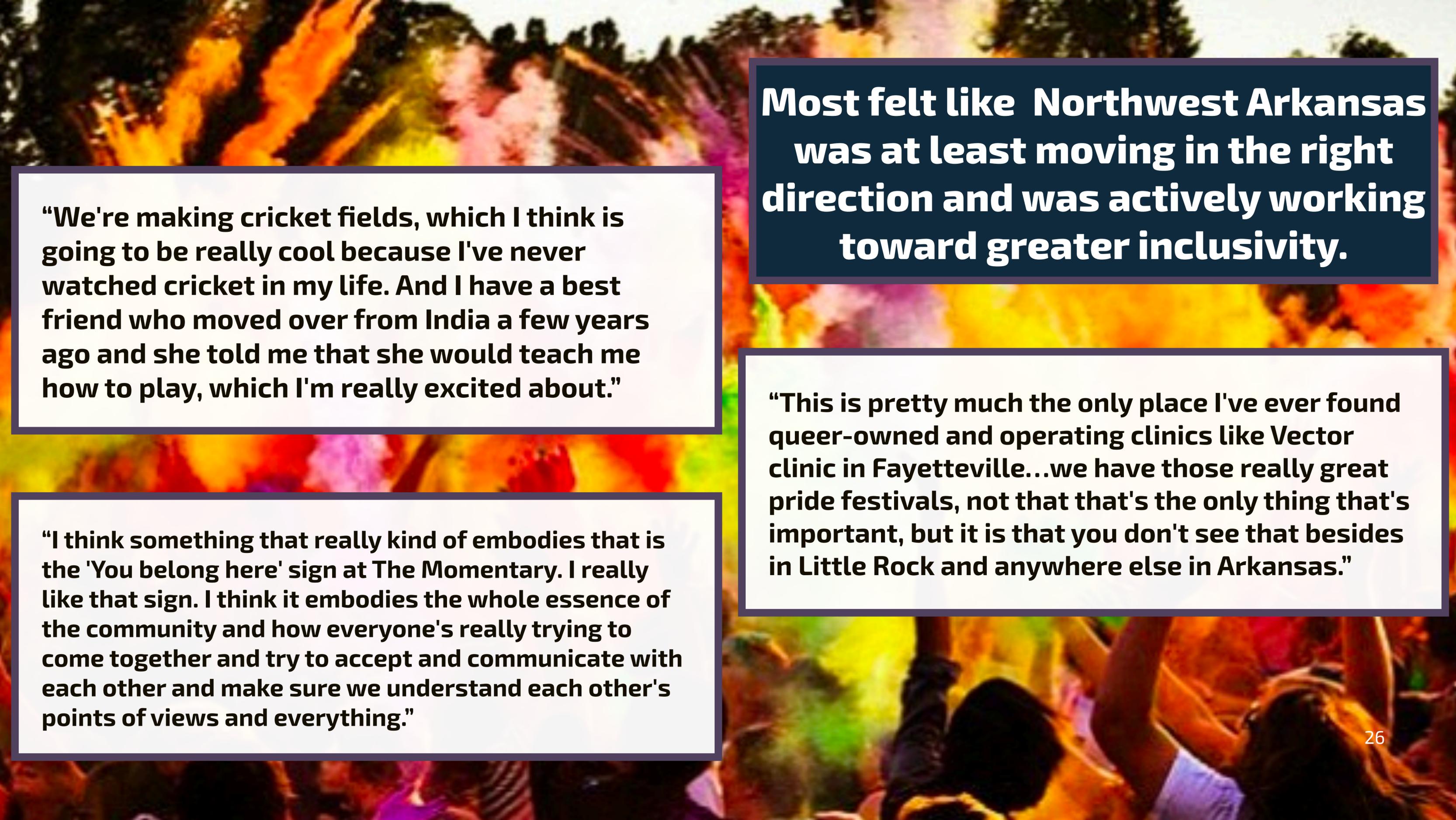


“So I didn't really want to stay here because I don't feel safe being a trans kid living in the south or just Arkansas.”

Some felt like they were not accepted or safe in Northwest Arkansas.

“I think this is all I really need to say, in Harrison, there is a billboard promoting white supremacy radio. So I think that's all, that's enough right there. That's the radio station that they are promoting on their billboard.”

“I think there are some people that don't respect my opinions. And I mean, there's people all... I mean, everywhere, and that are just really mean about it.”



“We're making cricket fields, which I think is going to be really cool because I've never watched cricket in my life. And I have a best friend who moved over from India a few years ago and she told me that she would teach me how to play, which I'm really excited about.”

“I think something that really kind of embodies that is the 'You belong here' sign at The Momentary. I really like that sign. I think it embodies the whole essence of the community and how everyone's really trying to come together and try to accept and communicate with each other and make sure we understand each other's points of views and everything.”

Most felt like Northwest Arkansas was at least moving in the right direction and was actively working toward greater inclusivity.

“This is pretty much the only place I've ever found queer-owned and operating clinics like Vector clinic in Fayetteville...we have those really great pride festivals, not that that's the only thing that's important, but it is that you don't see that besides in Little Rock and anywhere else in Arkansas.”

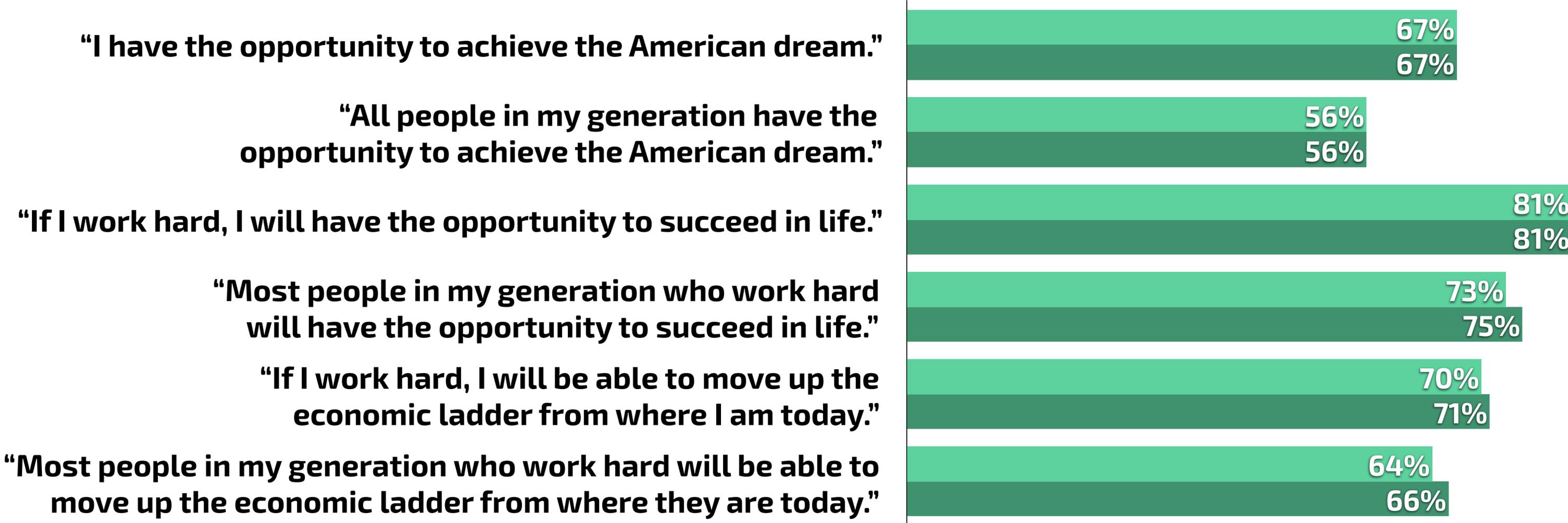
NW Arkansas Teen Views On American Dream, Opportunity, And Mobility Generally Consistent With Survey Of Gen Zers And Millennials

Q. In general, do you believe or not believe the following statement?

% Believe

■ Jun. 2020

■ Jan. 2021





This started with schools - our teenage participants were generally very positive about their own education - and the ability to pursue a wide array of paths as a result of it.

Northwest Arkansas Gen Z Sees Schools As Offering Quality Education, But There Are Some Worries About Equity

Hands-On Opportunities and Advancement

“We have Ignite, which is a program that lets students who are involved, if students want to pursue medicine, then **they can actually intern and perform** or help doctors do surgeries and stuff.” - Ashwin (17/18)

“And that's probably one of the best aspects here, as far as learning goes, is the **ability to choose your own path...**” - Aaren (17/18)”

“I feel like there's a lot of **opportunities for people to branch out** and figure out what they're interested in.” - Lahari (15/16)

Equity Challenges

“One place that I've experienced that **there's not really a ton of equity is in the school system specifically honors and AP classes.** And so I was in the gifted and talented program, I guess, technically I still am. But anyway, that's one place that I've noticed...that's someplace that I've experienced where it's especially just glaring difference between what it looks like and what I feel like it should be.” - Fiona (15/16)



“Please don’t let this place turn into Austin.”

Most respondents felt Northwest Arkansas was a dynamic, fast-growing place, and that this was mostly a positive thing. They noted that there are frequently new businesses opening and always something new to do.

However, some worried that growth could move too fast, increasing gentrification, harming the natural environment, increasing cost of living and creating overcrowding, driving out the things that make Northwest Arkansas a great place to live today.

Northwest Arkansas Gen Z Thinks Growth Can Come With Costs, Wants What Is Good About Region To Be Preserved

Concerns About Change Because Of Growth

“It's nice to have some growth, but **I'd like to keep the vibe of Northwest Arkansas** and not having like 200,000 Californians or somebody else, like a specific group, move at once, within six months. That's a little unsustainable, frankly.” - Henry (17/18)

Worries About Gentrification

“I think it could get better in focusing, not on building new things on and stuff, but like fixing what is already there and **perfecting what is already here before we build new things.**” - Abigail (13/14)

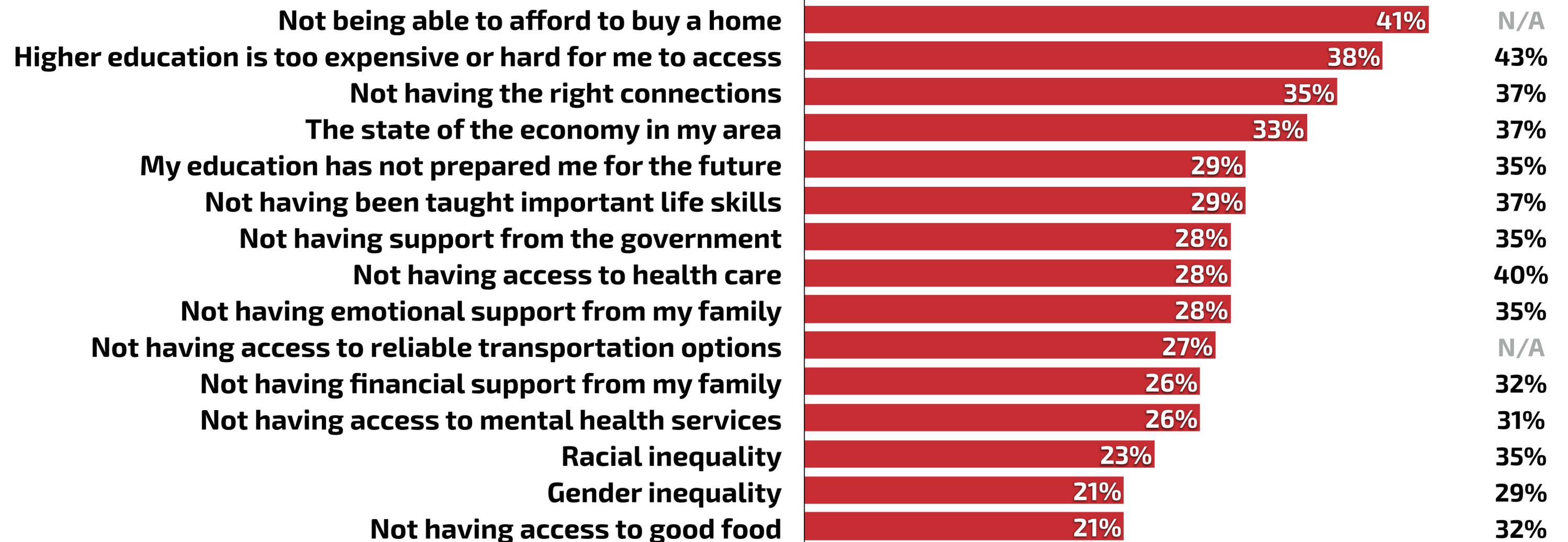
“It's important that we're building up and using space saving apartments, that we can maintain nice parks and beautiful nature spaces for us to visit...**I know that our trends with gentrification are increasing, and I am nervous.** Like I want to spend a long period of my time here, but I can't lie that I'm not nervous that it might be harder for me to be able to stay here, and for my family to be able to stay here, because of the increasing rent.”- Laura (17/18)

Inability To Buy Home, Access Higher Education Top Problems

Q. In thinking about things that might keep you from having the opportunity to live a “better life” or the life you want to live, which of the following do you think are problems you do face or will face? How much of a problem do you think they are or will be for you, if at all?

% Extremely or Very Big Problem For Me

Jun. 2020



Creating Change in Northwest Arkansas



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They want to see their voices heard - and have concrete ideas for how their voices can be lifted up.

“I think it'd be fun to have **teen oriented meetings or a teen council**, like we have the city council, like maybe a teen council.” - Abigail (13/14)

“So, I think one of the things where younger people can get involved in the community, and the direction that the community is going, is in colleges, like the Northwest Arkansas Community College and the U of A. I think that those **colleges really help amplify younger voices**, especially with groups like clubs, like the LGBTQ club at NWACC.” - Summer (17/18)

They believe that their own voices have value **but** acknowledge it will be a challenge to be heard in the face of existing interests.

They view **large corporations, prominent individuals, and current policymakers** as having a lot of power over the direction of Northwest Arkansas.



Northwest Arkansas Gen Z Think Power Is Concentrated In The Hands Of A Few Companies and Leaders

Power In Hands Of
A Few Individuals

“I think Walmart and the Walton Family Foundation, overall, have done a very good job at actually pushing us forward to have a better area. And I still think that they **still have most of that power** in Northwest Arkansas.” - Henry (17/18)

“I think that we're almost in this transition period where we're getting there, but I don't think we're there yet, **where every single voice in the community is being heard** and being addressed at kind of that top level.” - Karina (17/18)

Big Corporate
Power

“The Scott family and the Waltons, people that really have an impact on this community. And I feel like people really trust them. And if they say this will help our community, I feel like people will go along with that. **And I feel like they have a impact on us, whether it's good or bad.**” - Kenlee (13/14)

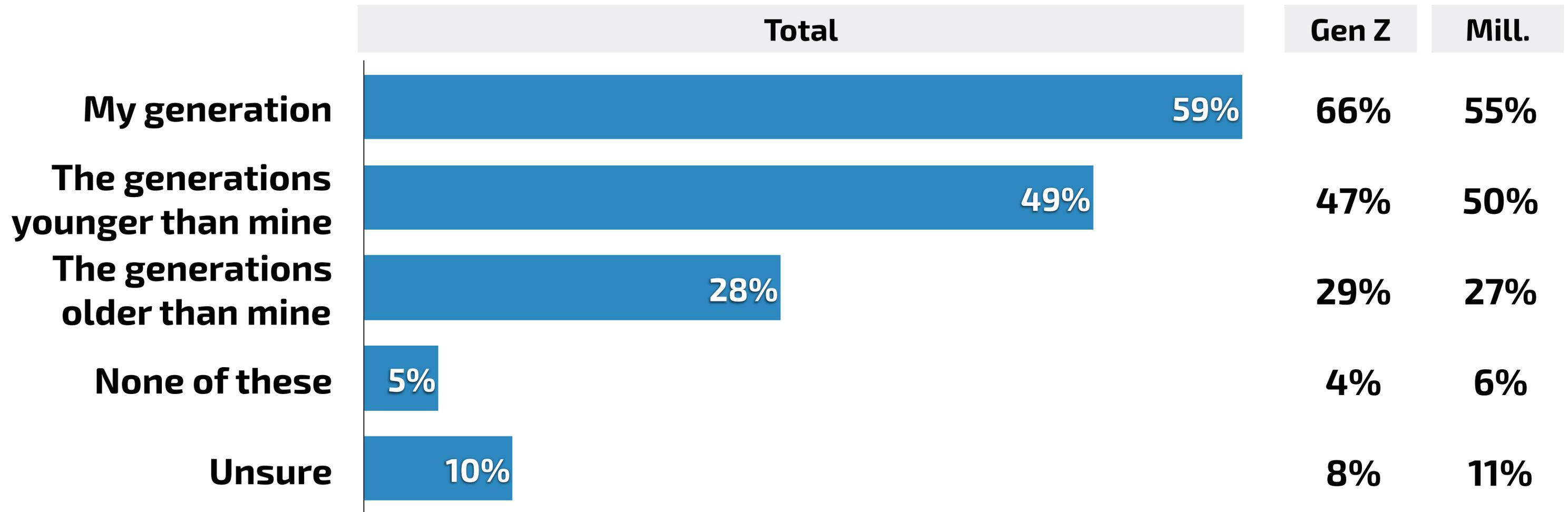


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Like NW Arkansas Teens, Majority Nationally Believe *Their* Generation Will Bring Positive Change, Half Also Look To Their Younger Peers To Play A Role

Q. What generation or generations do you expect will play a role in bringing about positive change during your lifetime? You may choose any and all that apply, or you may choose none if none apply. (JAN 2021)



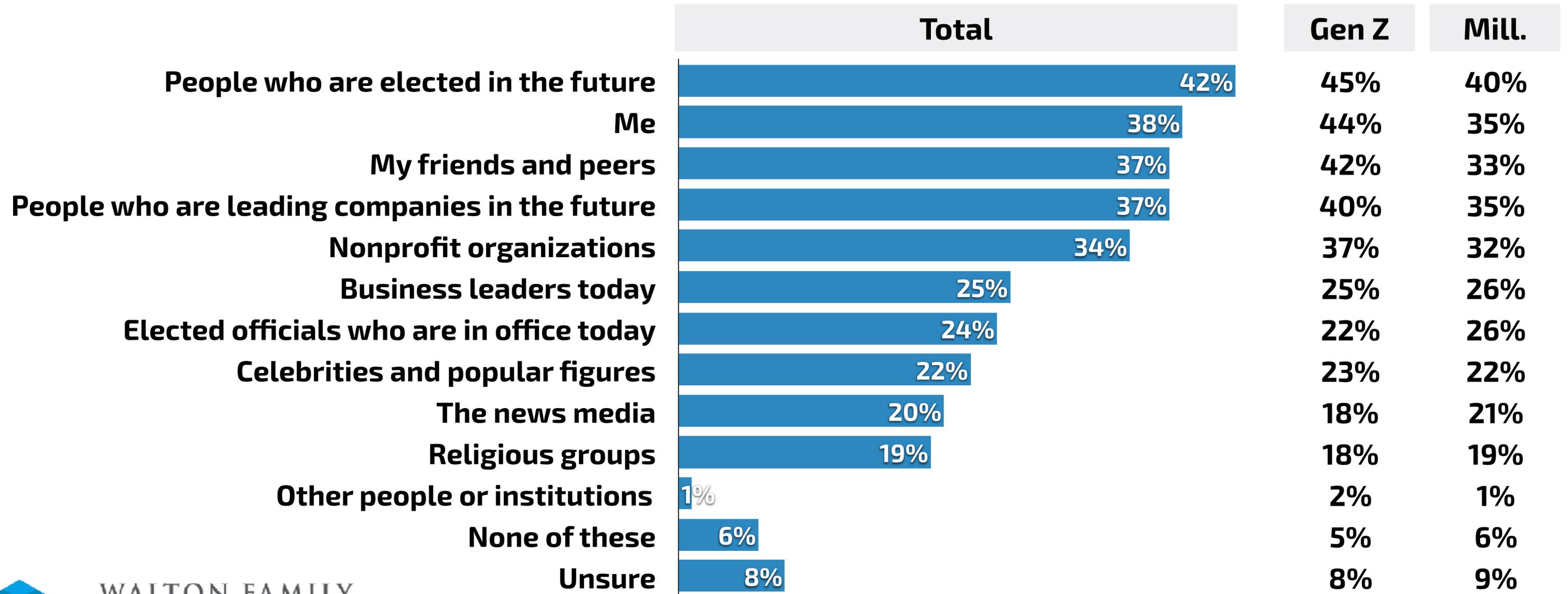
Who Do They Say Has A Role in Creating Change?

“Me.”



They See Themselves Personally Having A Role To Play

Q. What people or institutions do you expect will play a role in bringing about positive change during your lifetime? You may choose any and all that apply, or you may choose none if none apply. (NATIONAL SURVEY - JAN 2021)





ECHELON
INSIGHTS

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