

GROWTH IN NWA



Alli Quinlan



**THE FUTURE OF
LIVING IN NORTHWEST
ARKANSAS**

flintlock LAB

landscape, architecture, and building design

flintlock development

small infill real estate development company

incremental development alliance

acting director + senior faculty member

incremental code consultants

Incremental zoning code partnership with KronbergUA

community agency

policy, tech, and advocacy



Alli Thurmond Quinlan, AIA ASLA

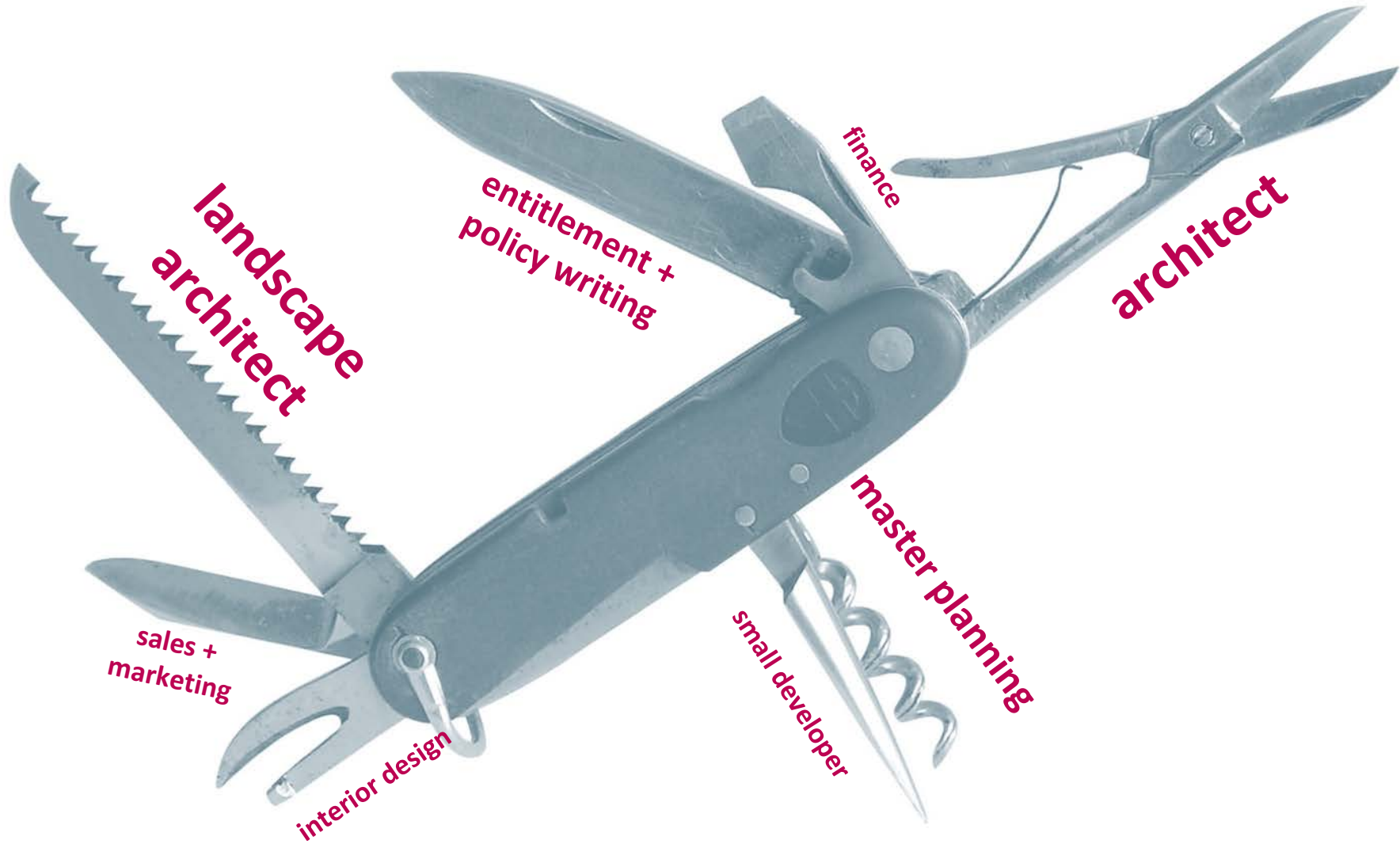
architect

landscape architect

small developer

former planning commissioner





landscape
architect

entitlement +
policy writing

finance

architect

master planning

small developer

sales +
marketing

interior design



2 OR MORE PERSONS
PER VEHICLE
↓

Culver City
NEXT 4 EXITS

82%
of Americans
live in urban or
suburban areas



7. FAYETTEVILLE

FAYETTEVILLE-SPRINGDALE-ROGERS,
AR-MO MSA

Fayetteville-Springdale-Rogers, AR-MO, gained two ranks from its last year's performance, ranking in the top 10 for the third consecutive year. The metro's post-pandemic job growth has landed it among the best-performing areas in the past three years after ranking 155th and 147th in the two years prior.

Located within the Ozarks region, the Fayetteville MSA, also referred to as Northwest Arkansas, is a collection of roughly 30 small to mid-size towns going through rapid growth and change.⁴⁰ The area has long benefited from the presence of the University of Arkansas, along with the home base of Walmart and two other Fortune 500 companies (Tyson Foods and JB Hunt Transport). In recent years, strong job and population growth, in large part driven by Fayetteville's transportation industries, has Northwest Arkansas hoping to become the next Silicon Valley of transportation.⁴¹ With Walmart beginning construction on a new headquarters in Bentonville, and the region seeing record-high venture capital investments, the future looks bright for Fayetteville.⁴²

As one of the fastest-growing metro areas, Fayetteville is on pace to be home to 1 million residents by 2045, which would result in almost doubling its size in just over 20 years.⁴³ Employment in the leisure and hospitality industries has partly driven Fayetteville's post-pandemic spike in job growth, but over a five-year period, growth in financial activities, professional services, and transportation has accounted for almost one-third of the metro area's employment gains. Job growth in the information industries has also taken off, with employment in the overall sector growing 34.3 percent during the past five years (albeit, from a low starting level). And although commercial vacancies are at an all-time high in many major cities, Fayetteville just hit a record-low commercial vacancy rate of 5.6 percent.⁴⁴ This can be compared to regional neighbors Austin, Dallas, and Houston, which have commercial vacancy rates greater than 20 percent.⁴⁵

Despite its notable growth in high-tech industries, the Fayetteville area still lags all other Tier 1 cities in high-tech industry diversification, concentrating most of the metro area's high-tech GDP production in only four of the possible 24 technology industries. If Northwest Arkansas hopes to continue to compete with the major cities in its region for investment, its ability to develop a more robust high-tech sector will be key.



Gained 2 ranks

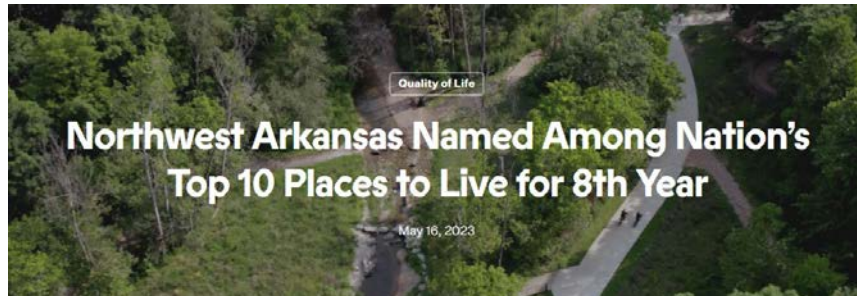
Indicator	Rank
Job growth (2017-22)	6th
Job growth (2021-22)	14th
Wage growth (2017-22)	37th
Wage growth (2021-22)	81st
Short-term job growth (8/2022-8/2023)	24th
High-tech GDP growth (2017-22)	23rd
High-tech GDP growth (2021-22)	3rd
High-tech GDP location quotient	1.28
Number of high-tech industries with LQ>1	4
Households with broadband	93rd
Households with affordable housing costs	13th
Community resilience	82.2%
Gini index (income inequality)	45.5

Strengths

- With the most affordable housing market of all Tier 1 large cities, Fayetteville can attract incoming residents with more than just high-wage employment opportunities.
- The metro area features a rare combination of rapid population and job growth, one of the nation's fastest-growing high-tech sectors, and affordability.

Areas of Focus

- Fayetteville largely relies on four high-tech industries to propel its GDP growth and therefore has one of the least diversified high-tech sectors among Tier 1 large cities.



10. Fayetteville, Arkansas

Metro Population: 538,063
Median Home Price: \$300,740
Average Annual Salary: \$51,590

This fast-growing metro area in Arkansas has long been a strong contender in the Best Places to Live ranking – and this year is no different. A low cost of living compared with household income, strong population growth due to net migration and steady job market all contribute to Fayetteville's ranking at No. 10 in 2023. Fayetteville has the eighth-lowest average monthly unemployment rate out of the 150 metro areas on the list at 2.39%, according to the Bureau of Labor Statistics. Plus, Fayetteville-area residents spend just 20.44% of the median household income on housing expenses.

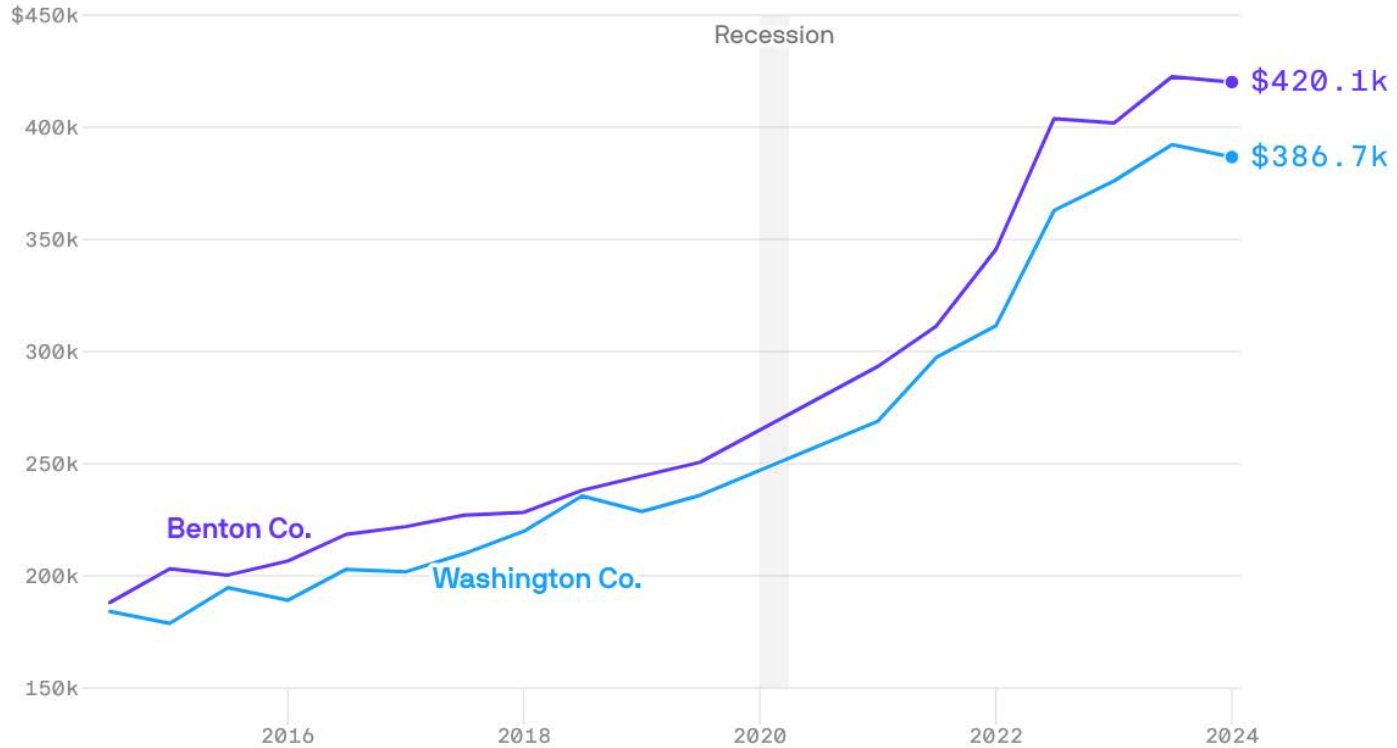
Learn more about Fayetteville.

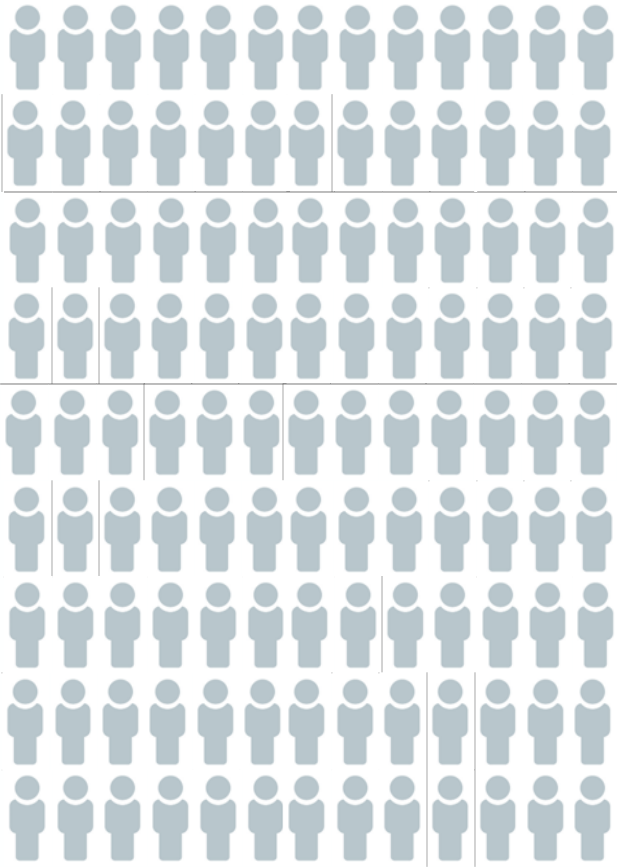
NEXT: 9. Colorado Springs, Colorado



Average selling price for a home in NWA

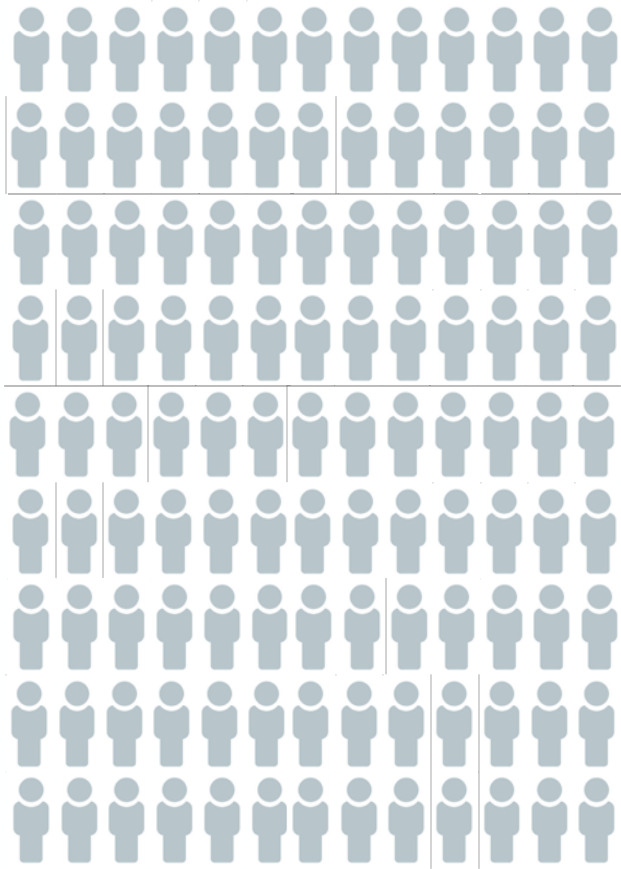
Semiannually; June 30, 2014, to December 31, 2023





CURRENT POPULATION

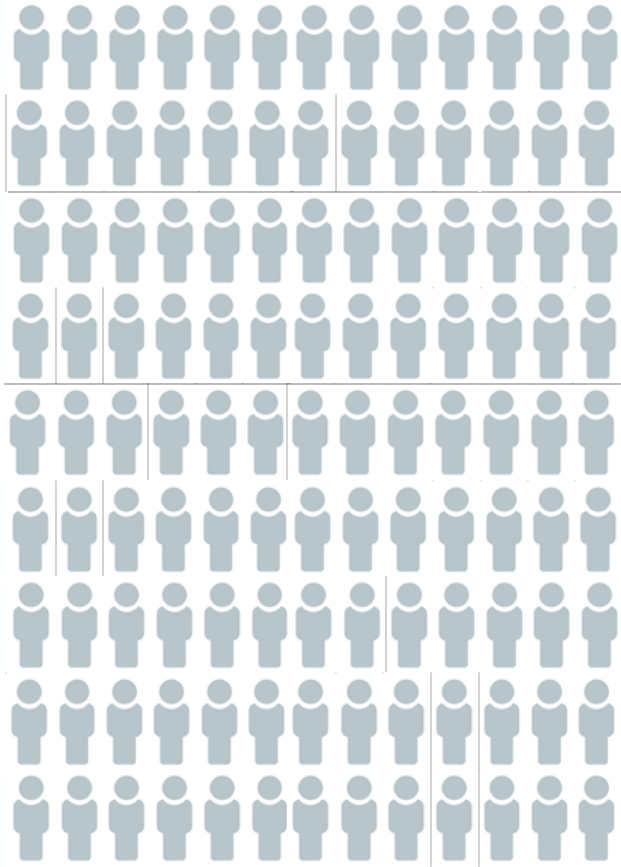




CURRENT POPULATION



**PROJECTED NEW
POPULATION BY
2030**



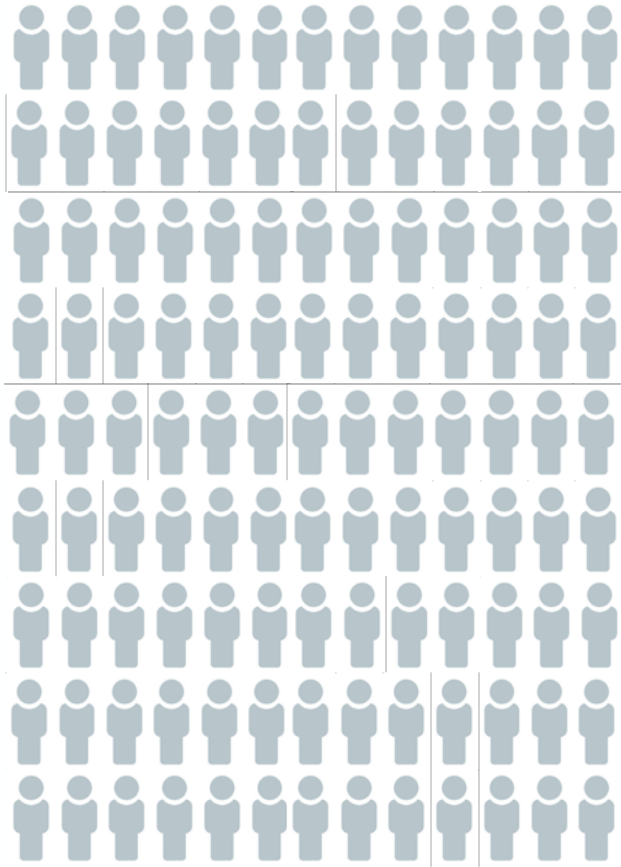
CURRENT POPULATION



**PROJECTED NEW
POPULATION BY
2030**



**PROJECTED NEW
POPULATION BY
2040**



CURRENT POPULATION



**PROJECTED NEW
POPULATION BY
2030**



**PROJECTED NEW
POPULATION BY
2040**



**PROJECTED NEW
POPULATION BY
2050**

6%
SINGLE PARENT
HOUSEHOLDS

26%
NUCLEAR
FAMILIES

41%
2 PEOPLE
NO KIDS

27%
1 PERSON
LIVING ALONE



68%
OF NWA
HOUSEHOLDS
HAVE NO
CHILDREN

**NWA
HOUSEHOLDS
SKEW SMALL**



CHANGING DEMOGRAPHICS: HOUSEHOLD SIZE

KRONBERG
URBANISTS
ARCHITECTS



1950: 3.8 PEOPLE PER HOUSE



2017: 2.5 PEOPLE PER HOUSE



2030: 2.0 +/- PEOPLE PER HOUSE

33%

MORE HOUSES
NEEDED FOR THE
SAME # OF PEOPLE

50%

MORE HOUSES
NEEDED FOR THE
SAME # OF PEOPLE



CURRENT HOUSEHOLDS



**PROJECTED NEW HOUSING UNITS NEEDED BY 2050 IF
HOUSEHOLD SIZE CONTINUES TO DECLINE AT THE CURRENT RATE**



CURRENT HOUSEHOLDS



**PROJECTED NEW HOUSING UNITS NEEDED BY 2050 IF
HOUSEHOLD SIZE CONTINUES TO DECLINE AT THE CURRENT RATE**



An aerial photograph of a suburban neighborhood. The houses are large, with various roof colors including red, white, grey, and blue. There are many trees with yellow and orange autumn foliage. A road curves through the neighborhood. A white rounded rectangle with a dark border is overlaid on the right side of the image, containing the text.

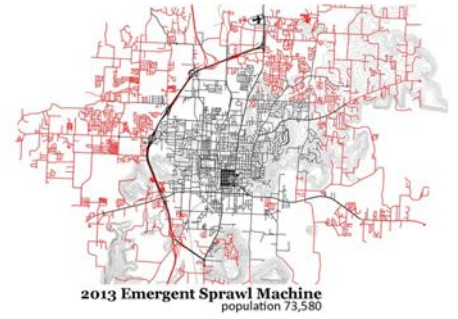
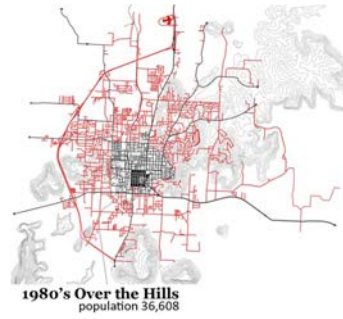
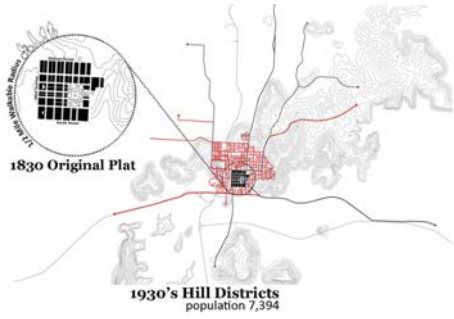
**NWA HOUSES
SKEW LARGE**



75%

**OF INCORPORATED LAND
IN NWA IS ZONED FOR
SINGLE FAMILY HOMES**

SINGLE FAMILY ZONING PASSED









**ILLEGAL TO
BUILD ALMOST
EVERYWHERE**

An aerial photograph of a suburban residential development. The houses are arranged in a grid-like pattern with winding streets. The houses are mostly single-story with light-colored roofs. There are green lawns and trees scattered throughout the development. In the foreground, there is a dense area of green trees. A white rounded rectangle with a black border is overlaid on the right side of the image, containing the text "LEGAL TO BUILD ALMOST EVERYWHERE" in bold, black, sans-serif capital letters.

**LEGAL TO
BUILD ALMOST
EVERYWHERE**

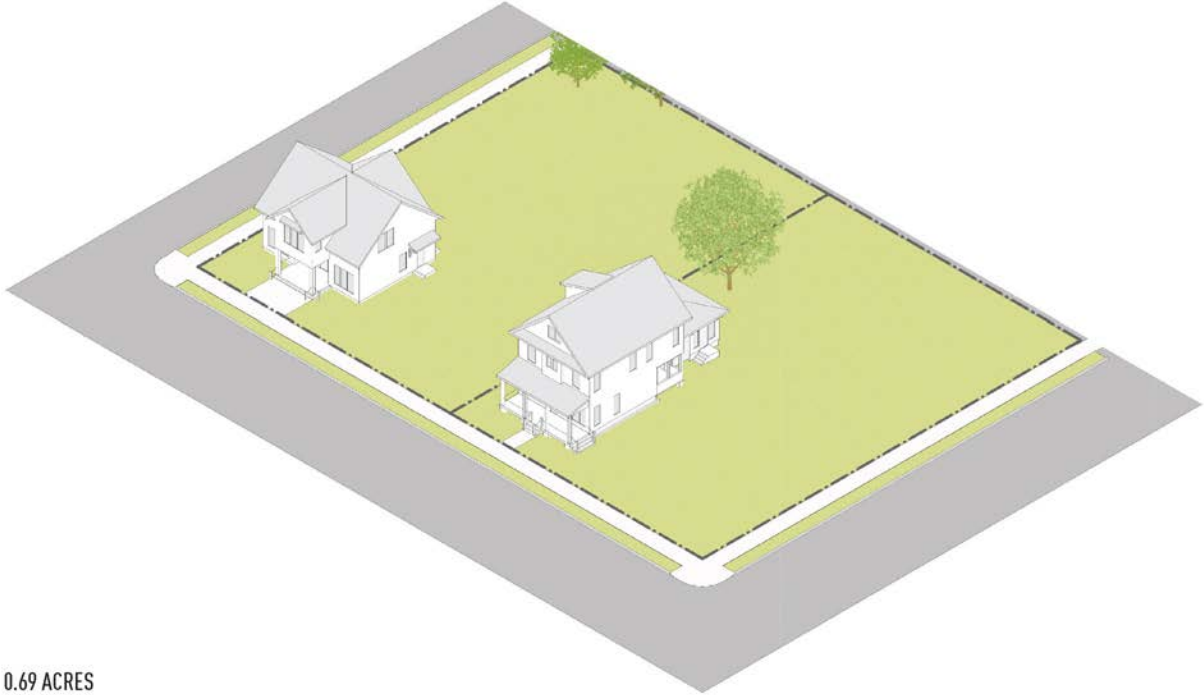
1. Legalize housing that works *(and that we can afford).*



**HOUSING IS EXPENSIVE
BECAUSE ATTAINABLE
HOUSING FORMATS ARE
(ACTUALLY) ILLEGAL**

**IT'S NOT JUST ABOUT WHAT
PEOPLE CAN AFFORD, IT'S ABOUT
WHAT CITIES CAN AFFORD**

HOUSING & INFRASTRUCTURE NEEDS

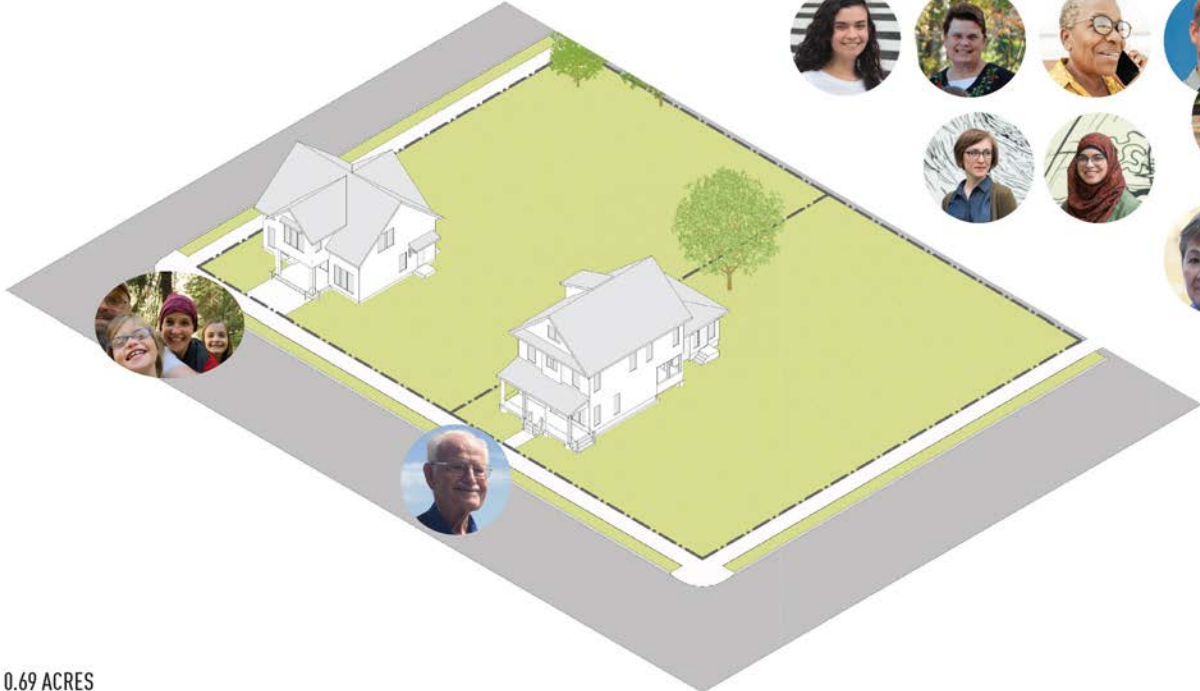


0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & PEOPLE NEEDS

KRONBERG
URBANISTS
ARCHITECTS

????

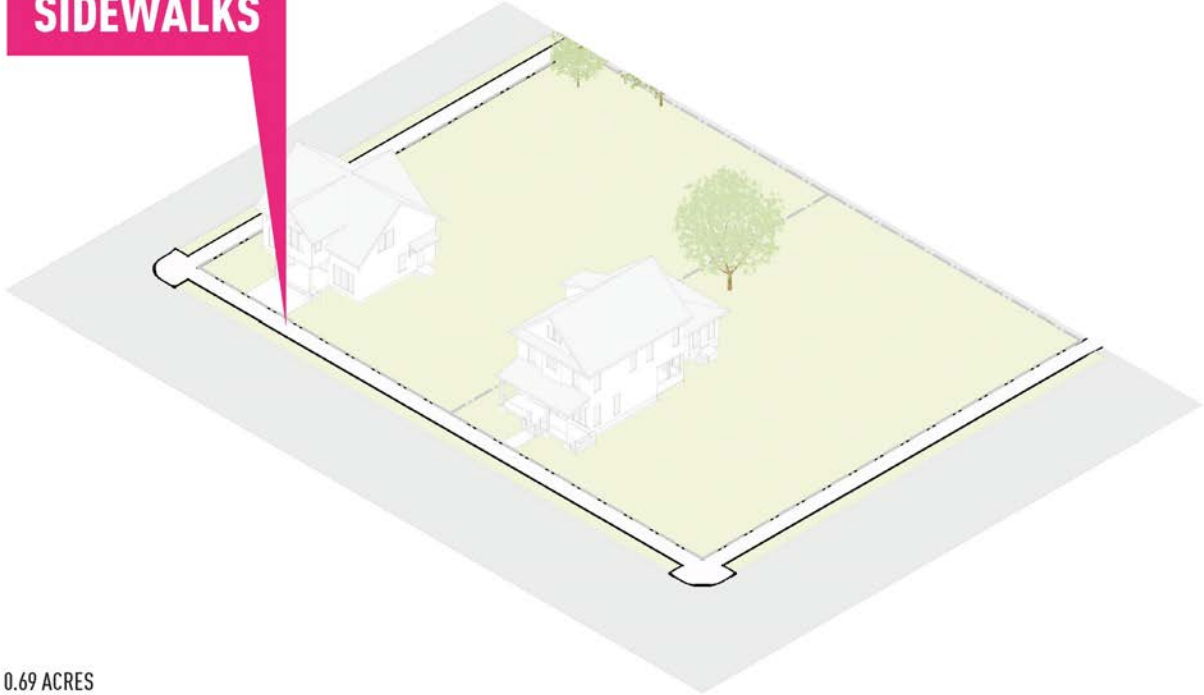


0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS

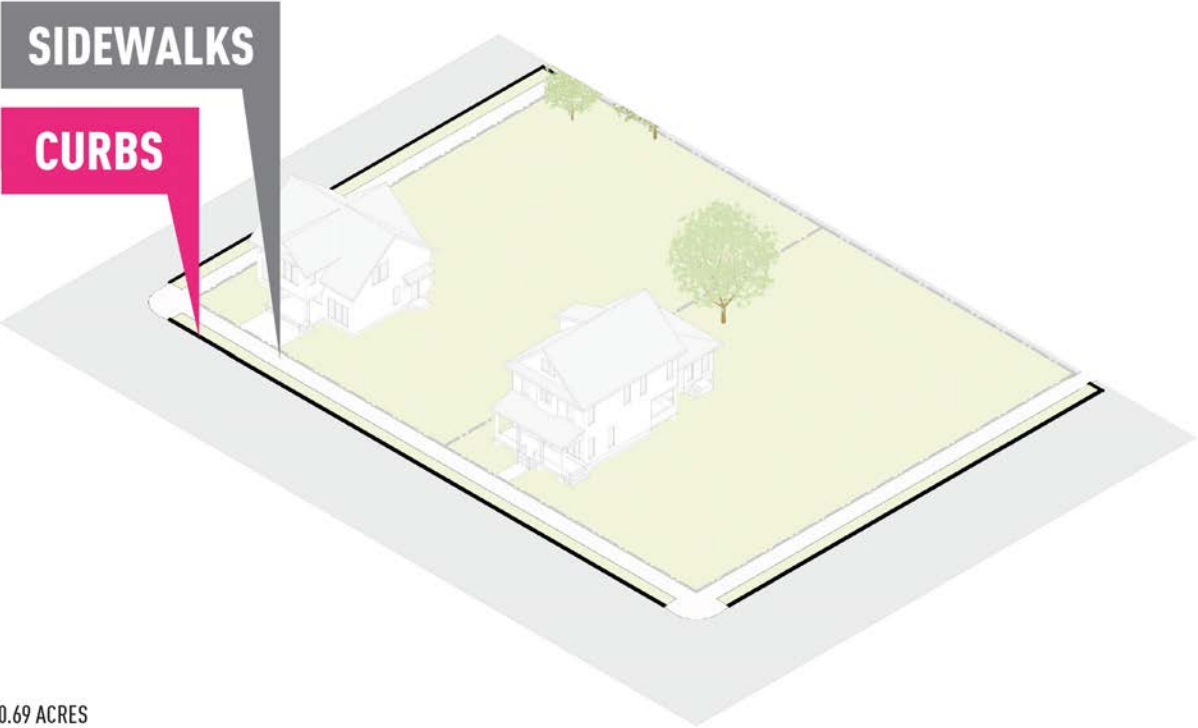


SIDEWALKS



0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



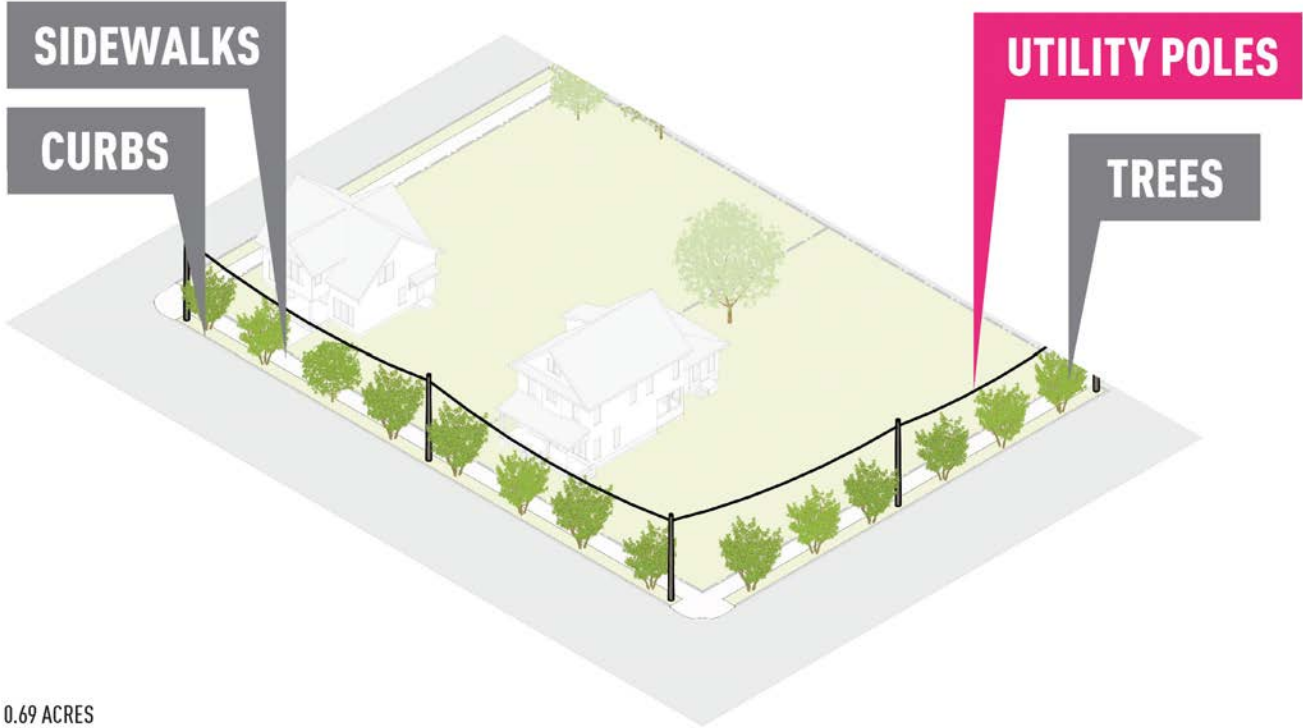
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



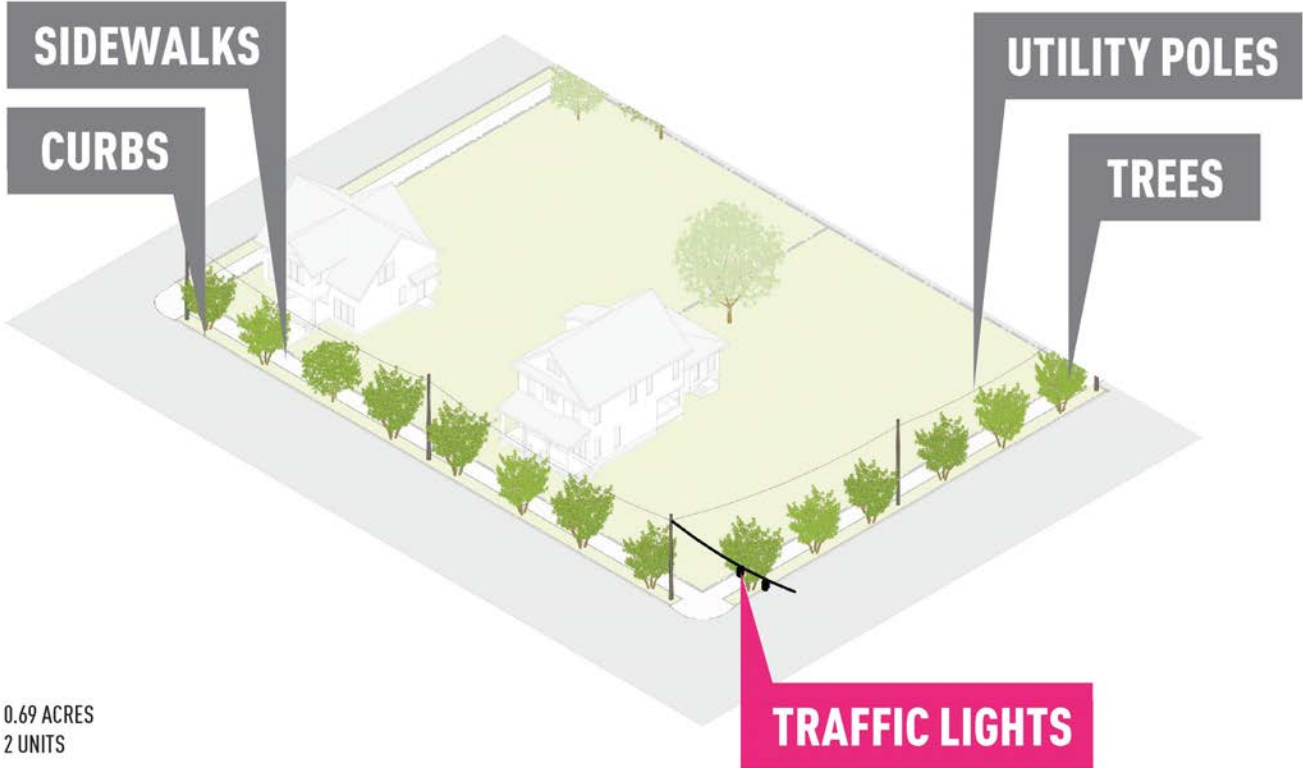
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



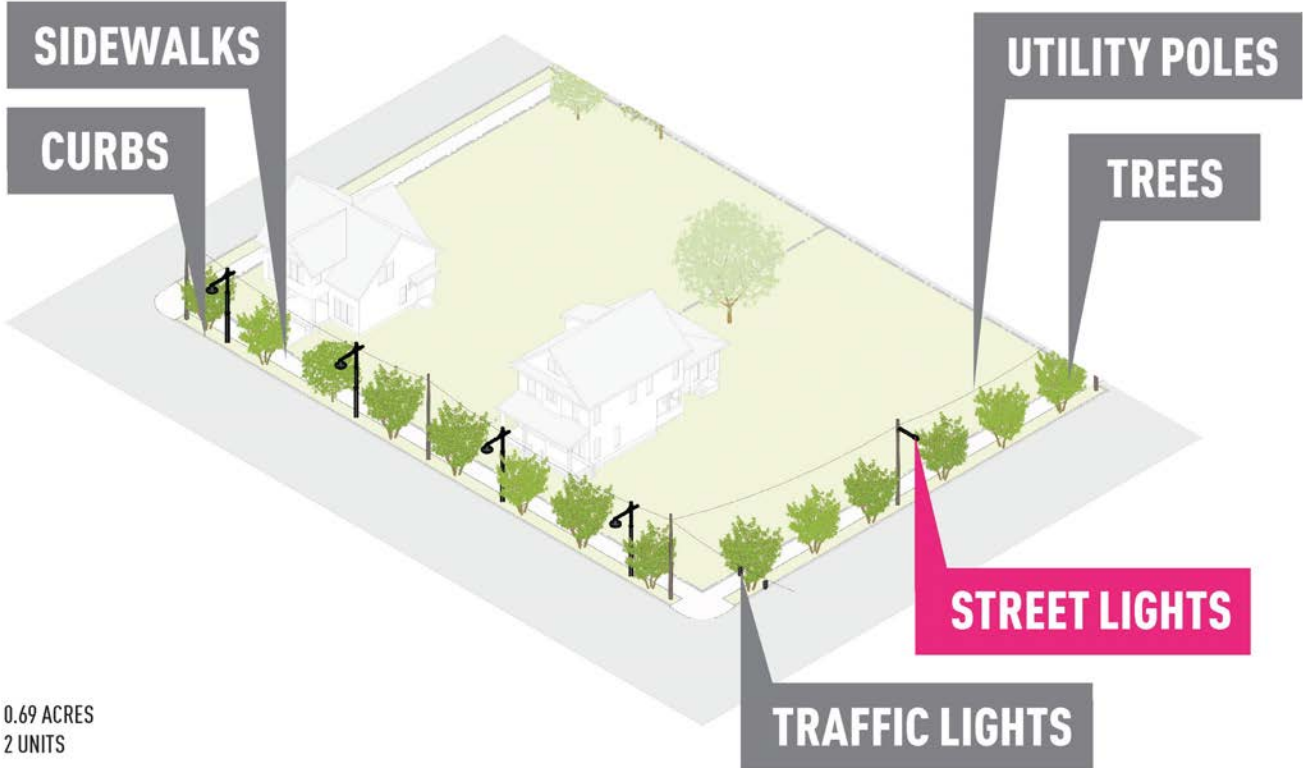
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



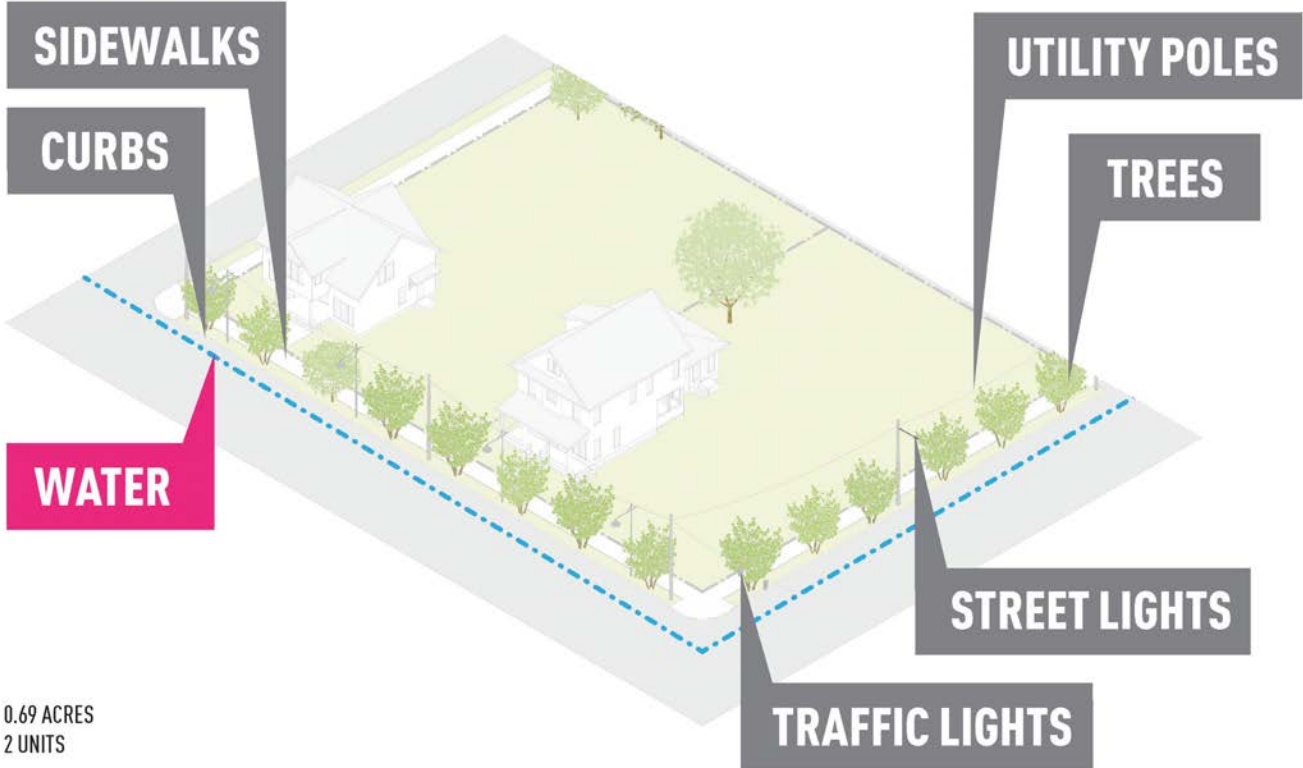
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



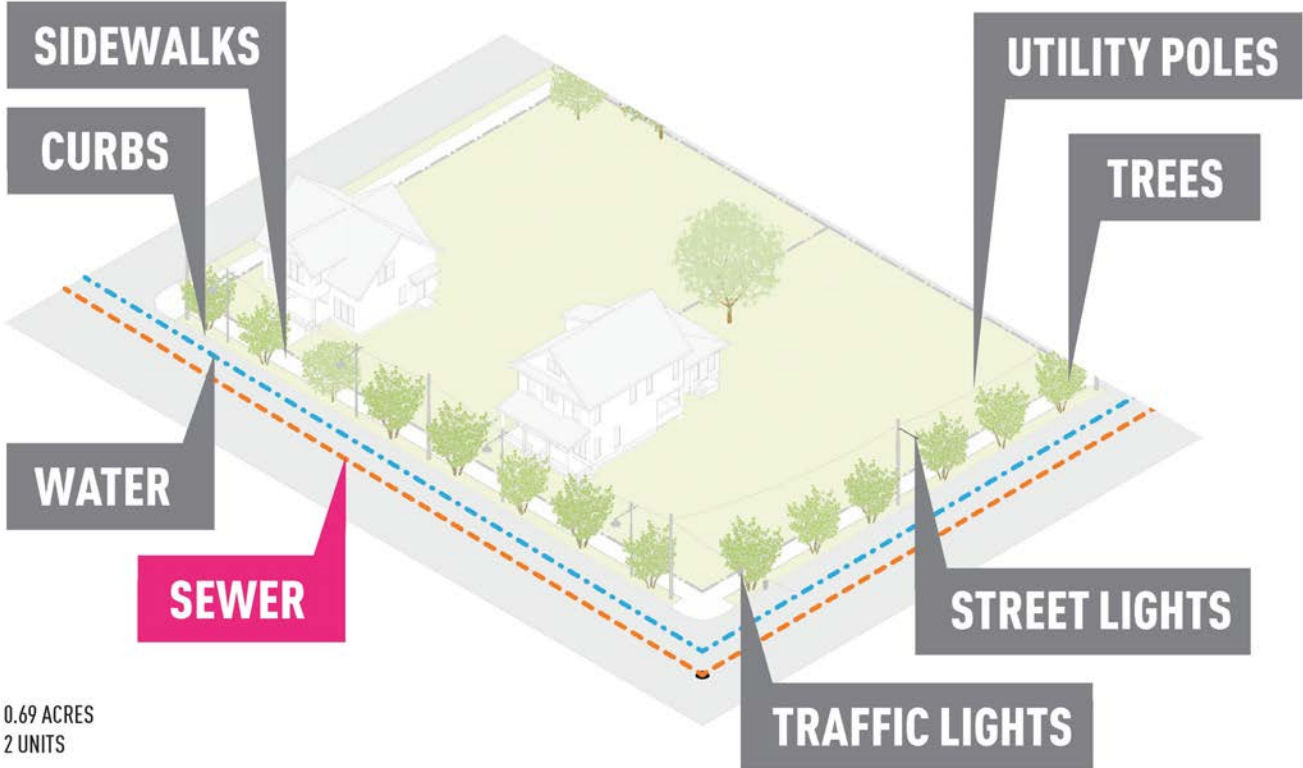
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



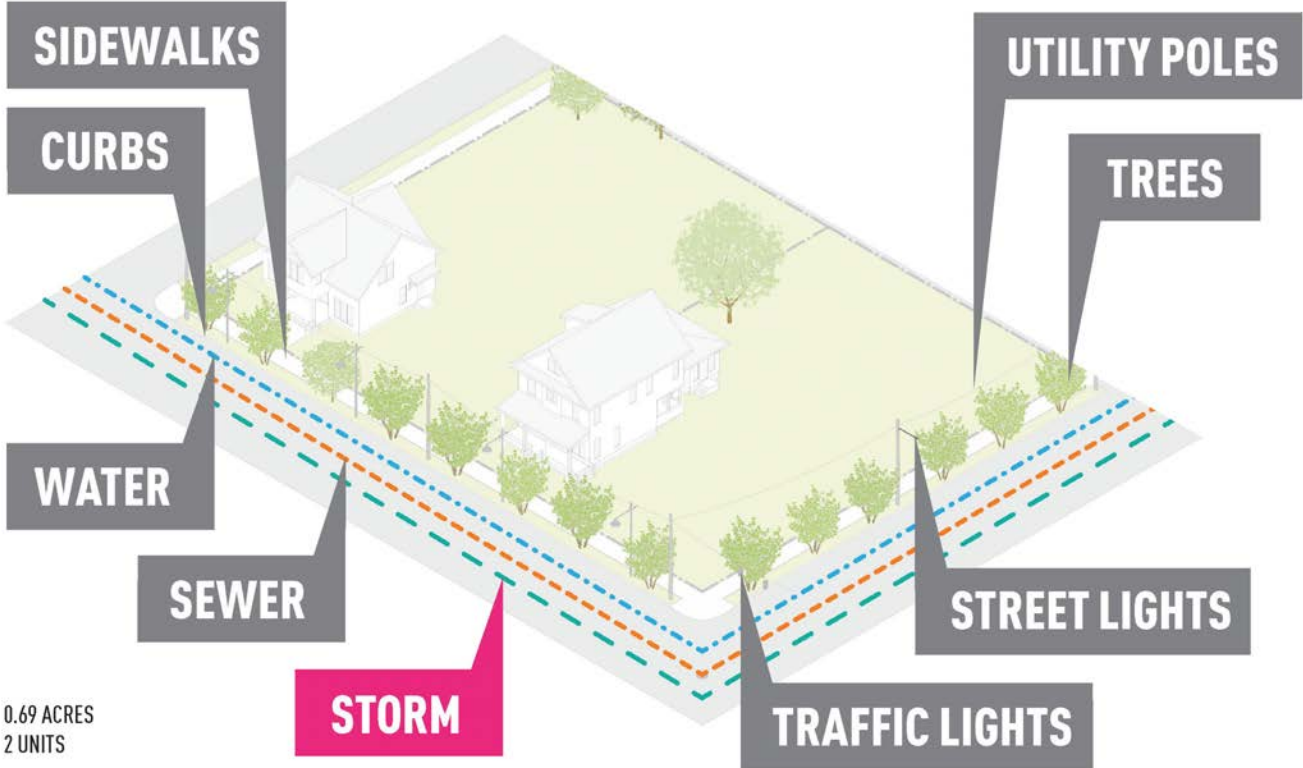
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



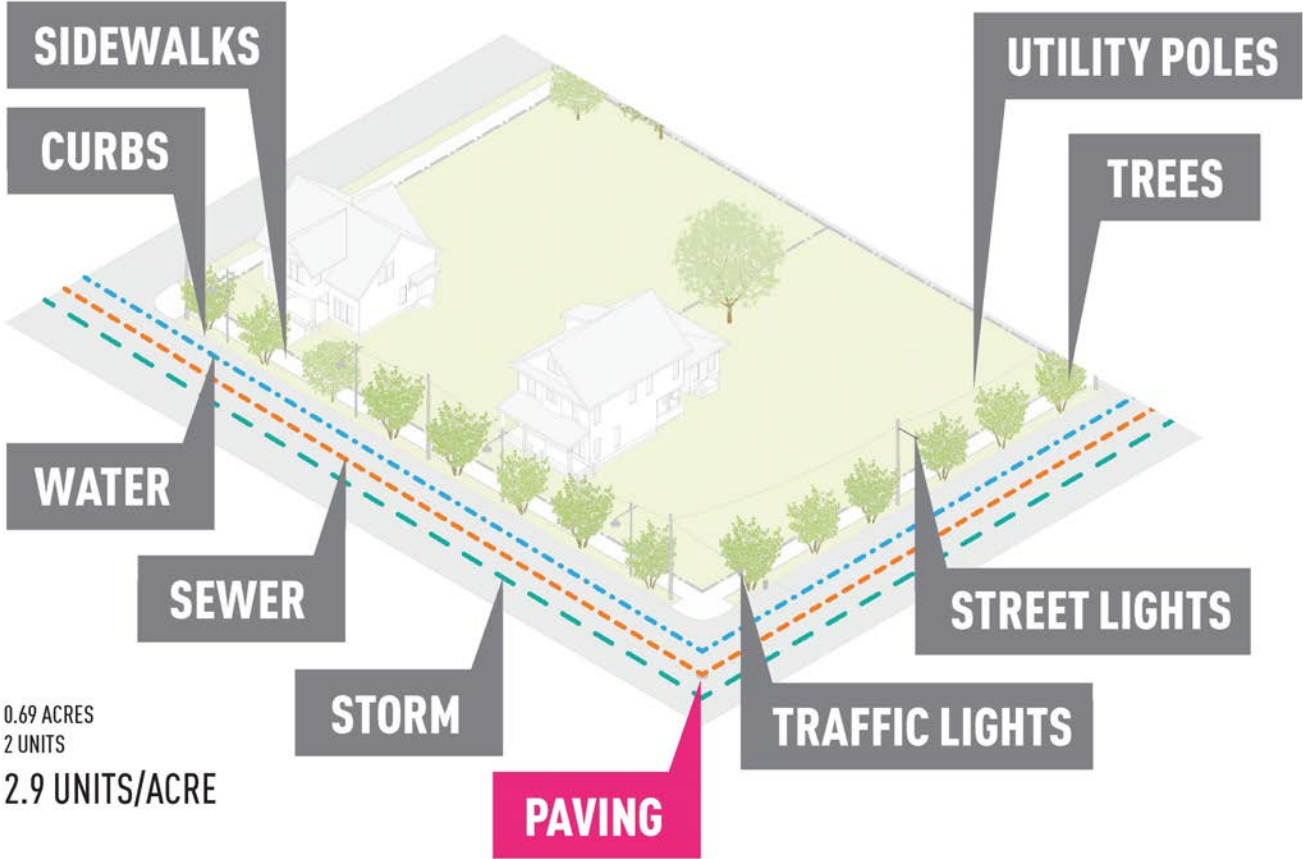
0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS

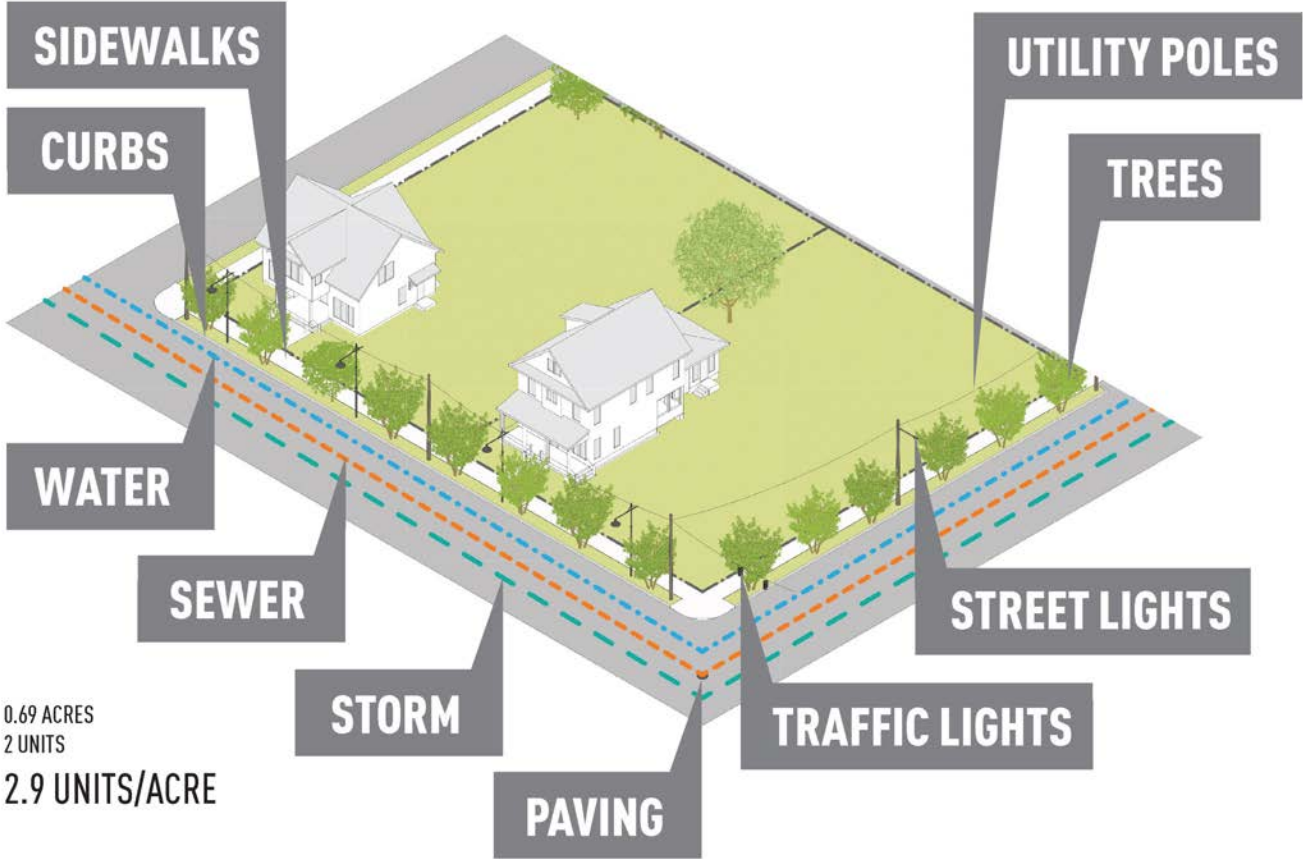


0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & INFRASTRUCTURE NEEDS



HOUSING & INFRASTRUCTURE NEEDS



HOUSING & SERVICE NEEDS



0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

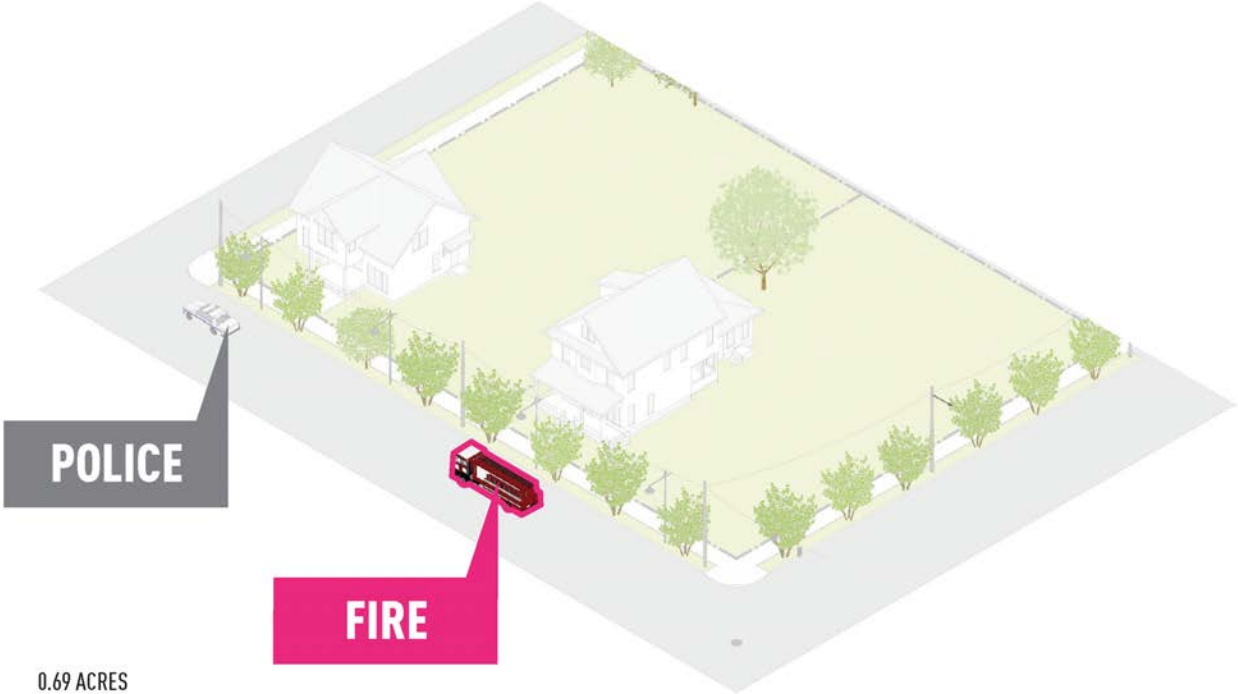
HOUSING & SERVICE NEEDS



POLICE

0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & SERVICE NEEDS

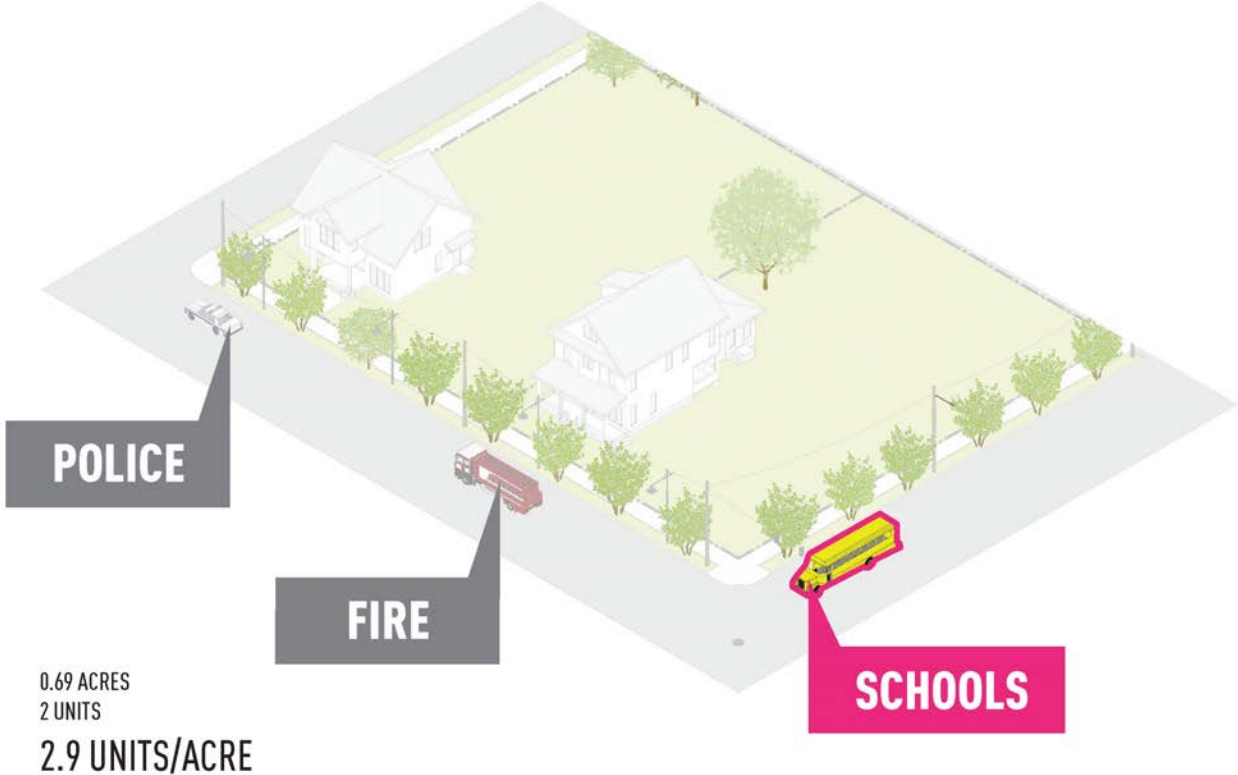


POLICE

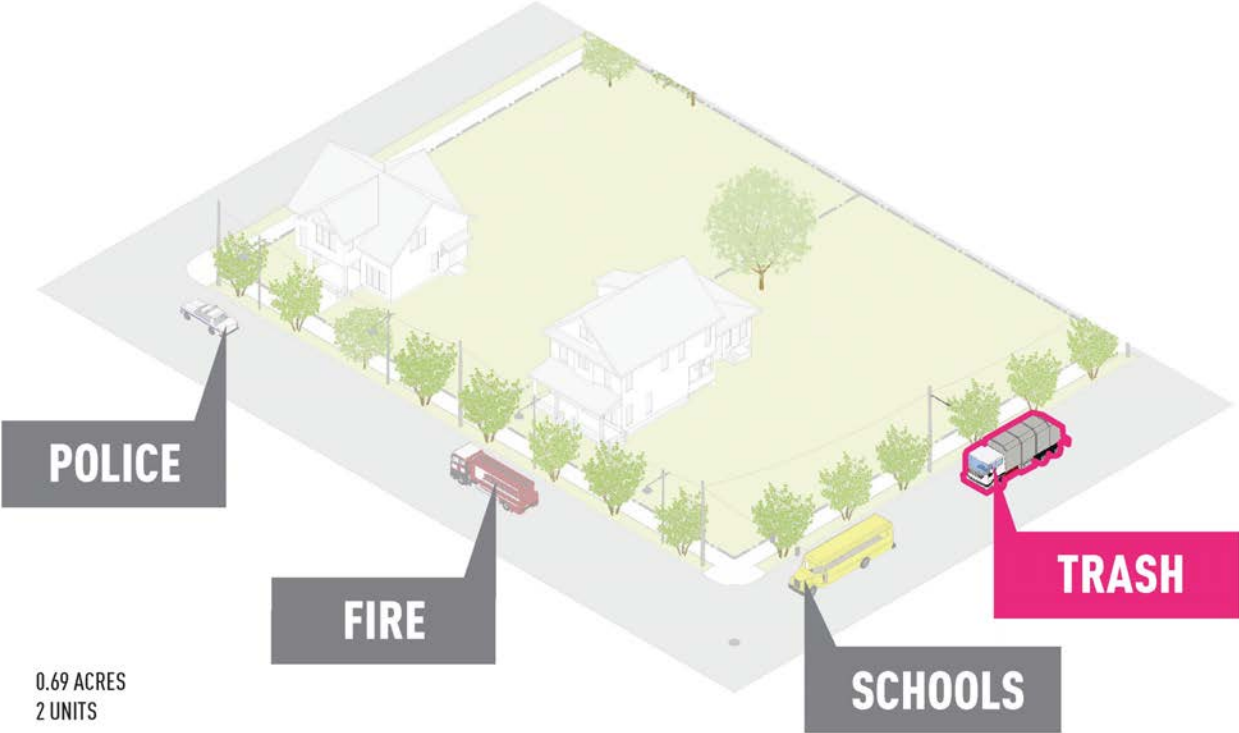
FIRE

0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

HOUSING & SERVICE NEEDS



HOUSING & SERVICE NEEDS



0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

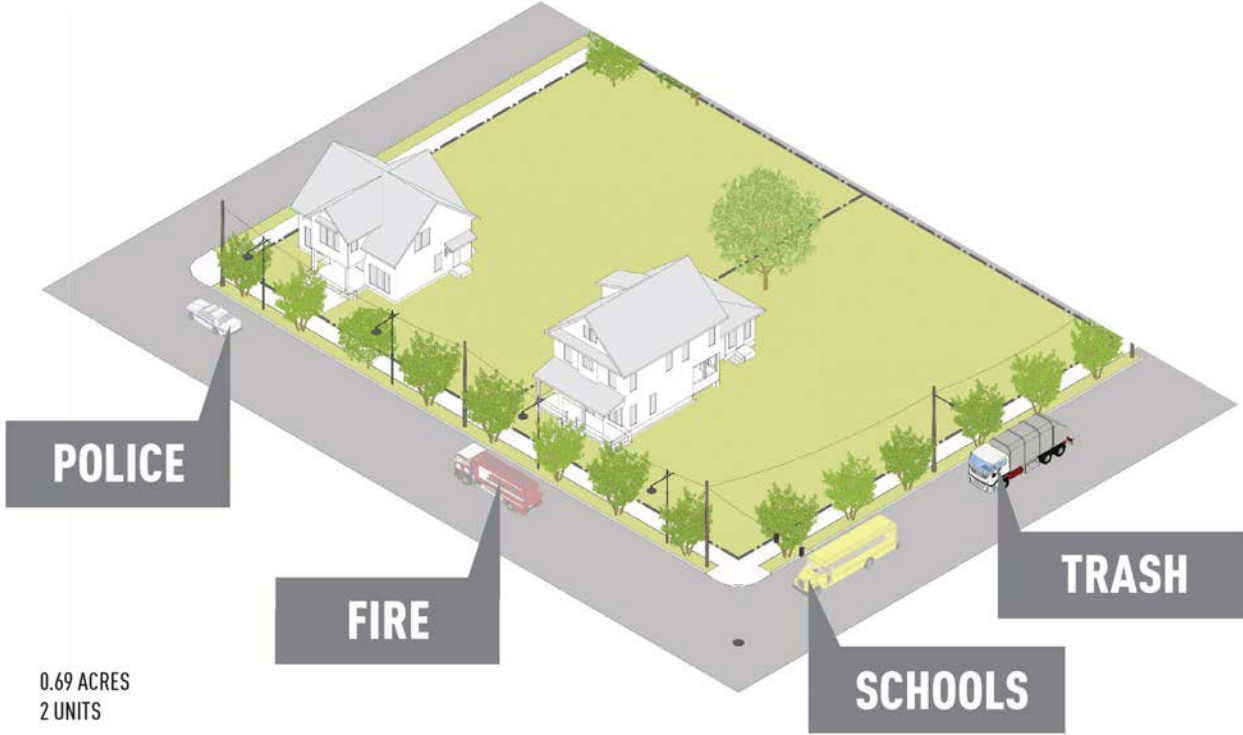
SCHOOLS

FIRE

POLICE

TRASH

HOUSING & SERVICE NEEDS



0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

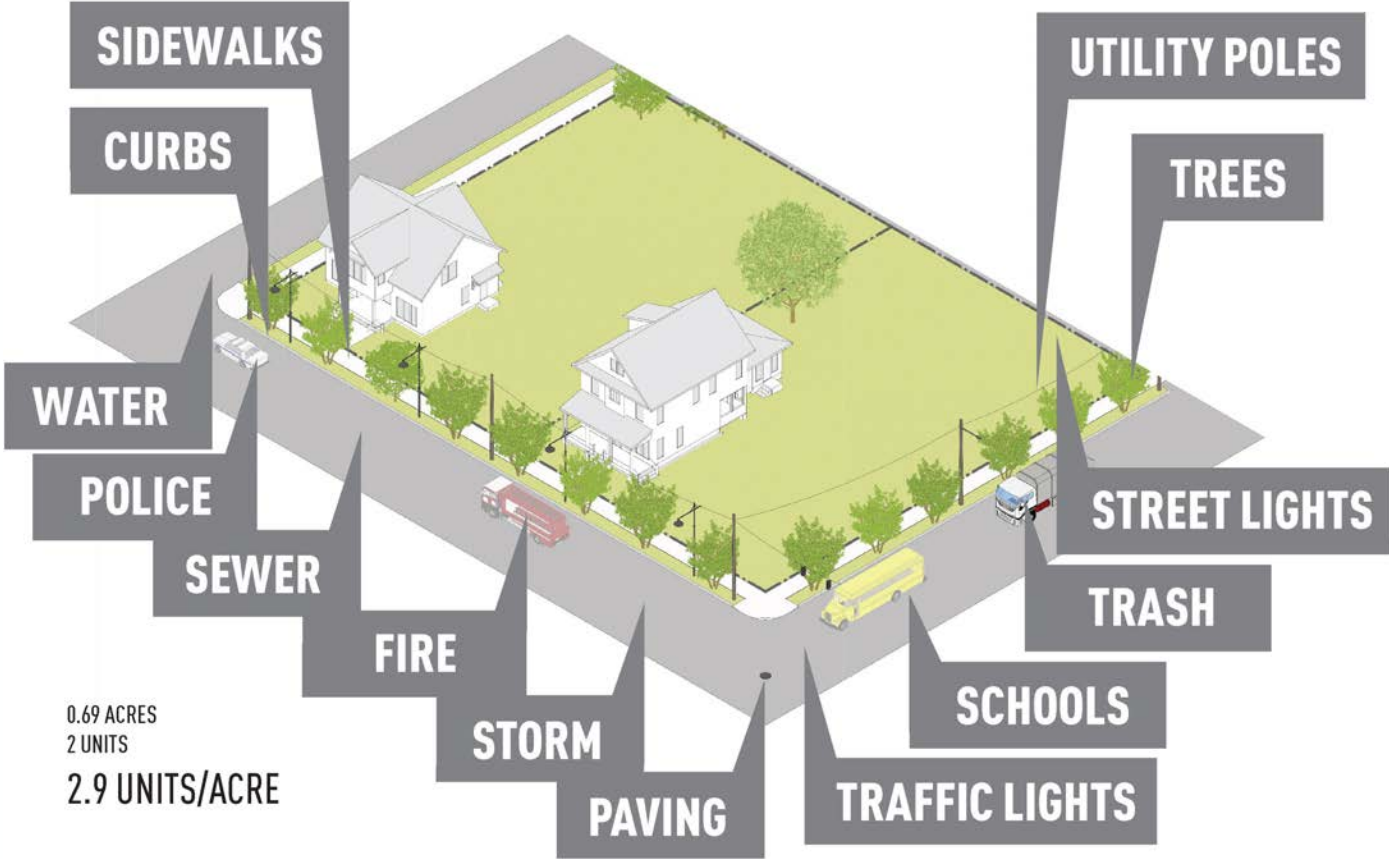
POLICE

FIRE

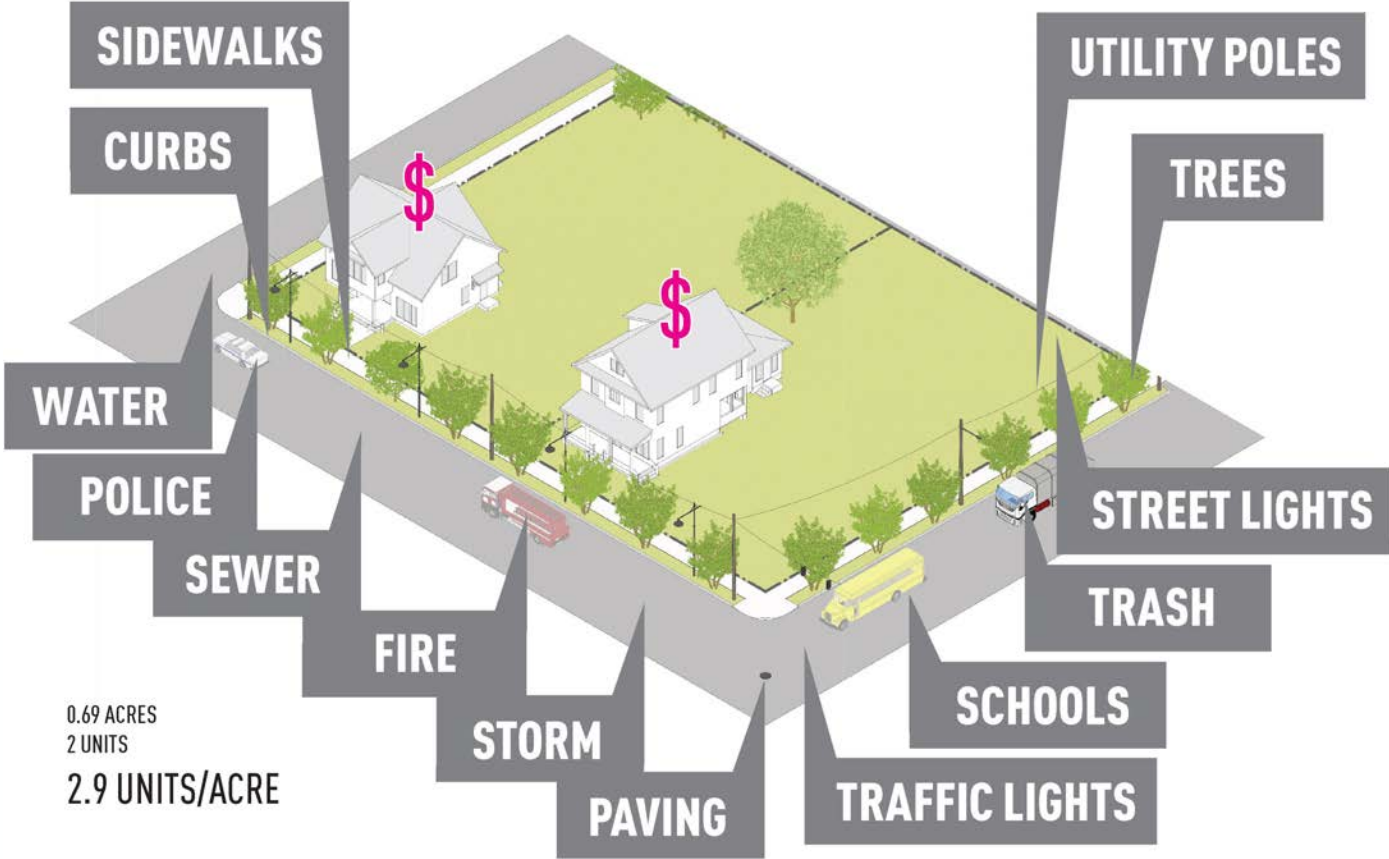
SCHOOLS

TRASH

HOUSING & INFRASTRUCTURE + SERVICE NEEDS

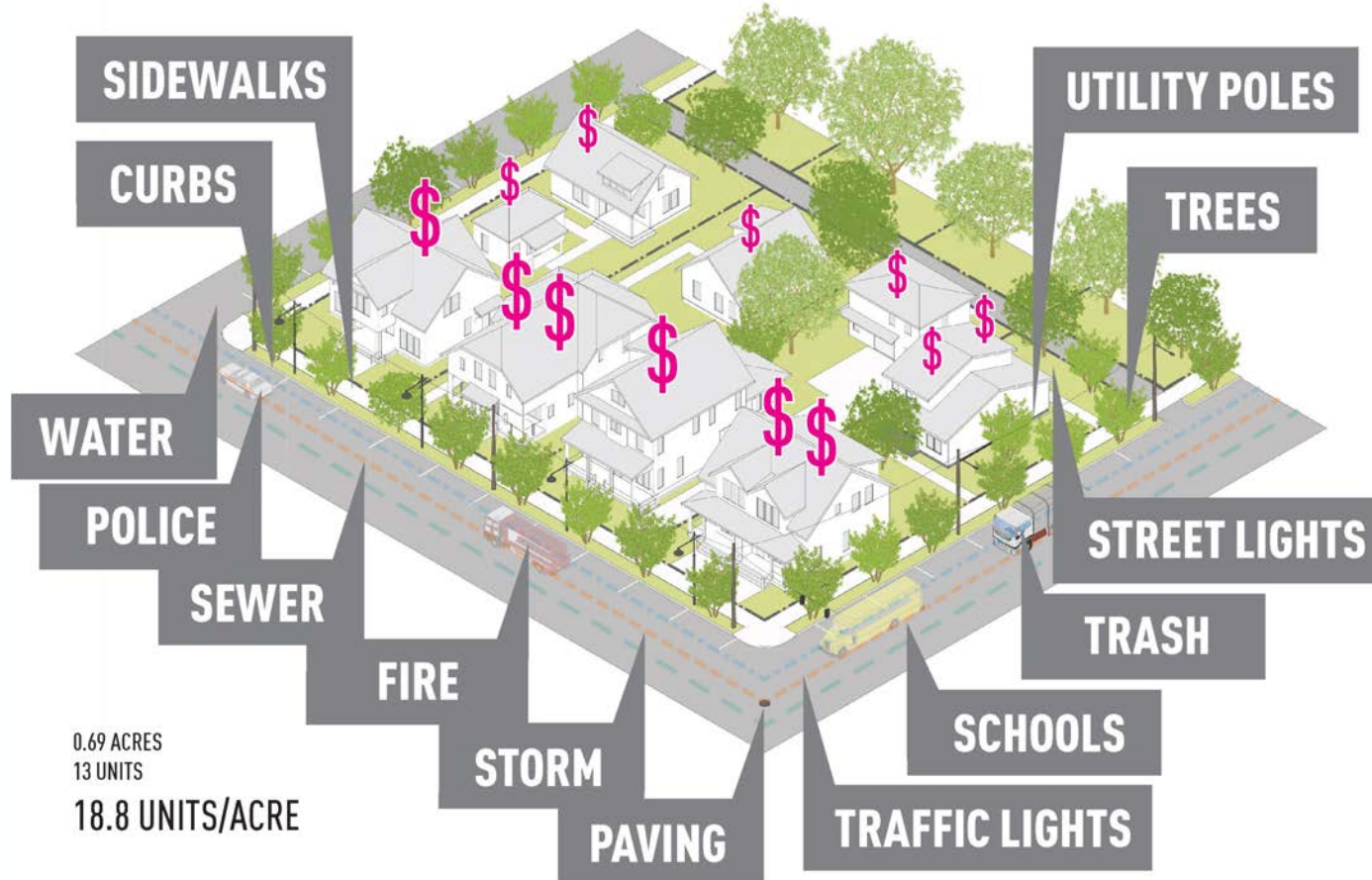


HOUSING & INFRASTRUCTURE + SERVICE NEEDS



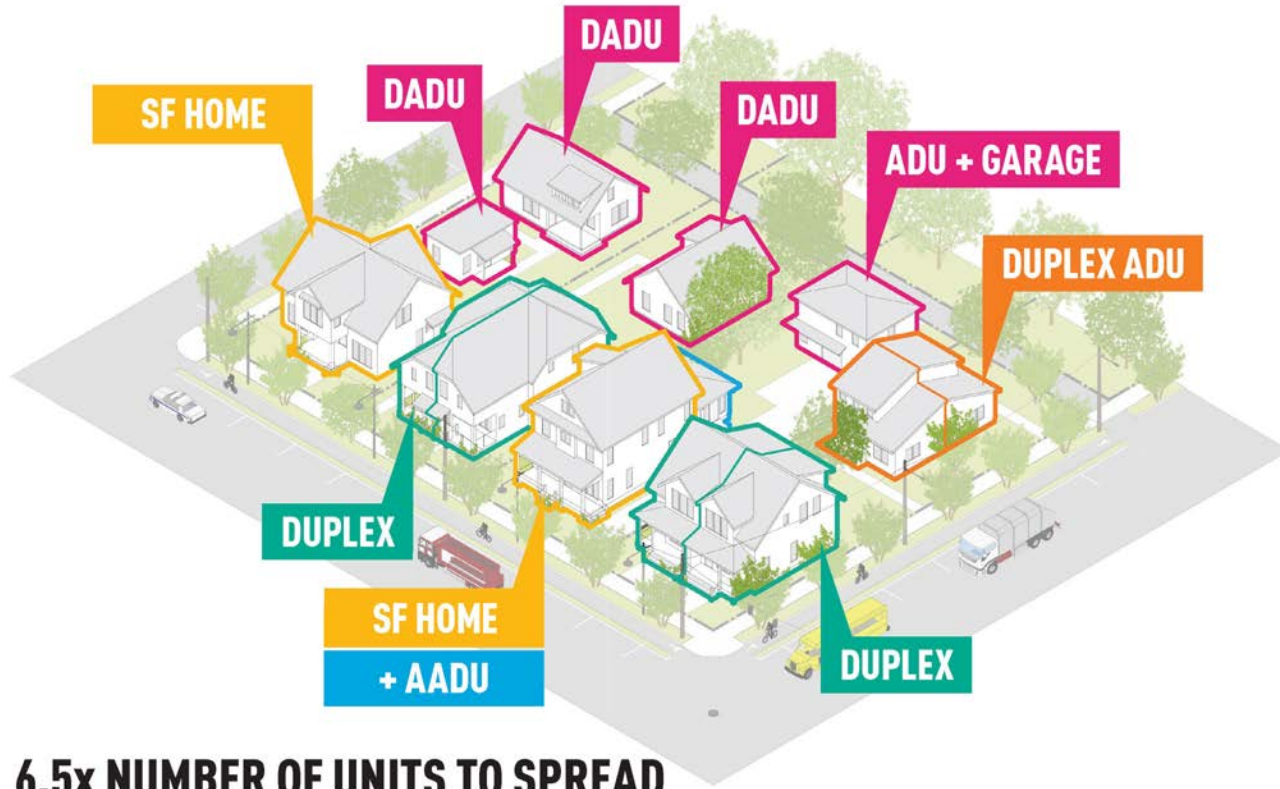
HOUSING CHOICE & INFRASTRUCTURE + SERVICE NEEDS

KRONBERG
URBANISTS
ARCHITECTS



HOUSING CHOICE & INFRASTRUCTURE + SERVICE NEEDS

KRONBERG
URBANISTS
ARCHITECTS

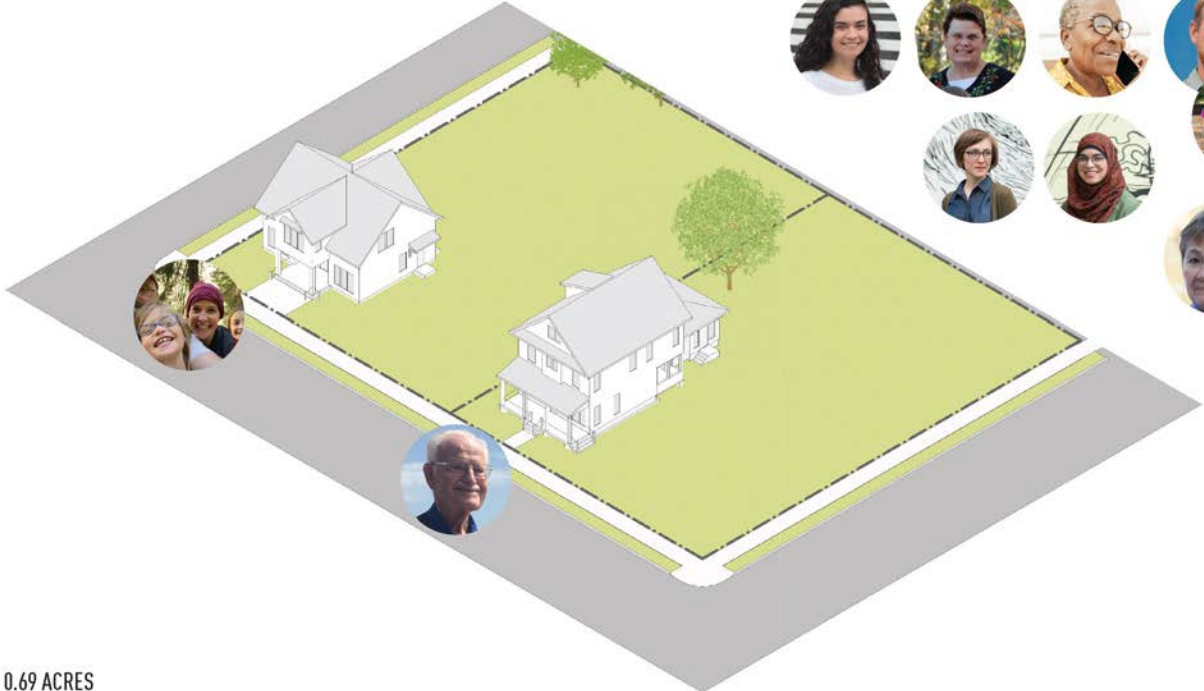


**6.5x NUMBER OF UNITS TO SPREAD
INFRASTRUCTURE COSTS ACROSS.**

HOUSING & PEOPLE NEEDS

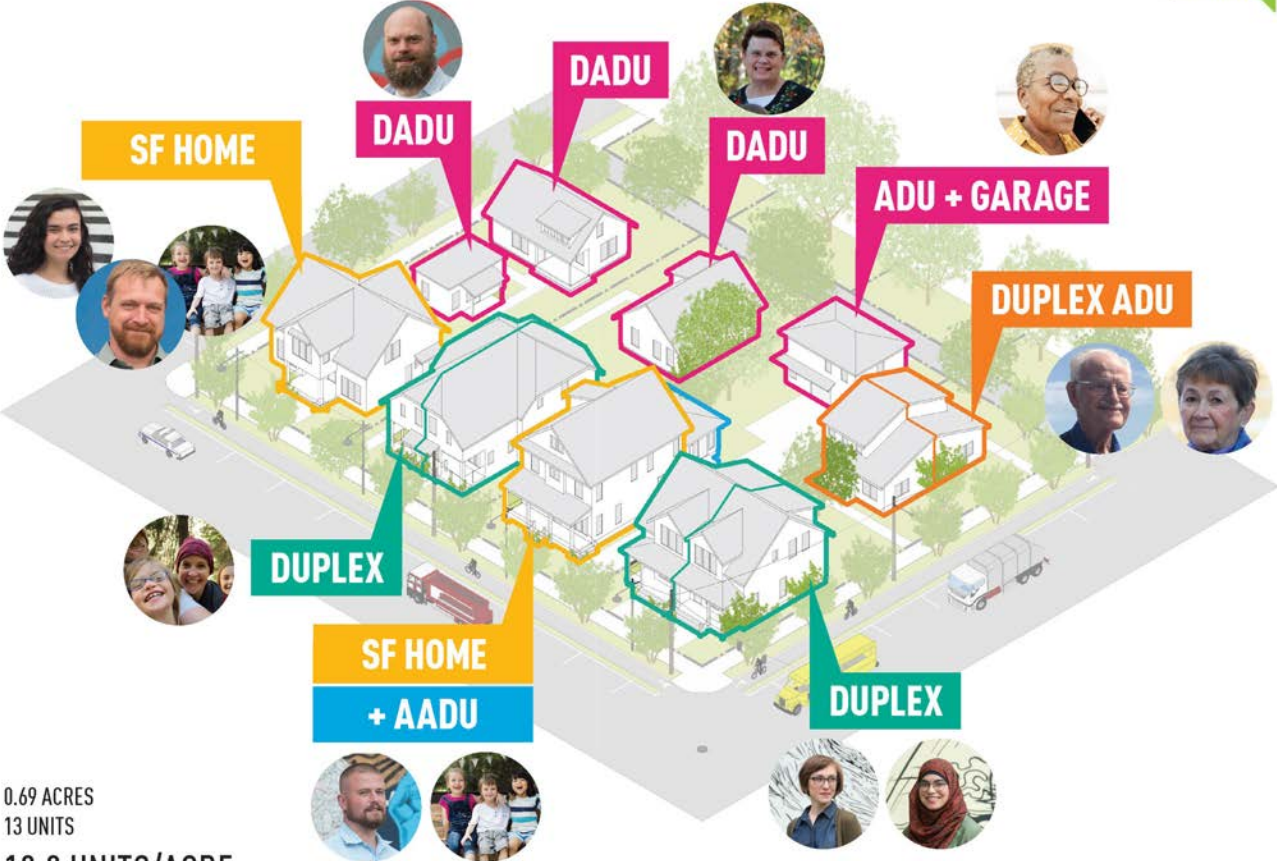
KRONBERG
URBANISTS
ARCHITECTS

????



0.69 ACRES
2 UNITS
2.9 UNITS/ACRE

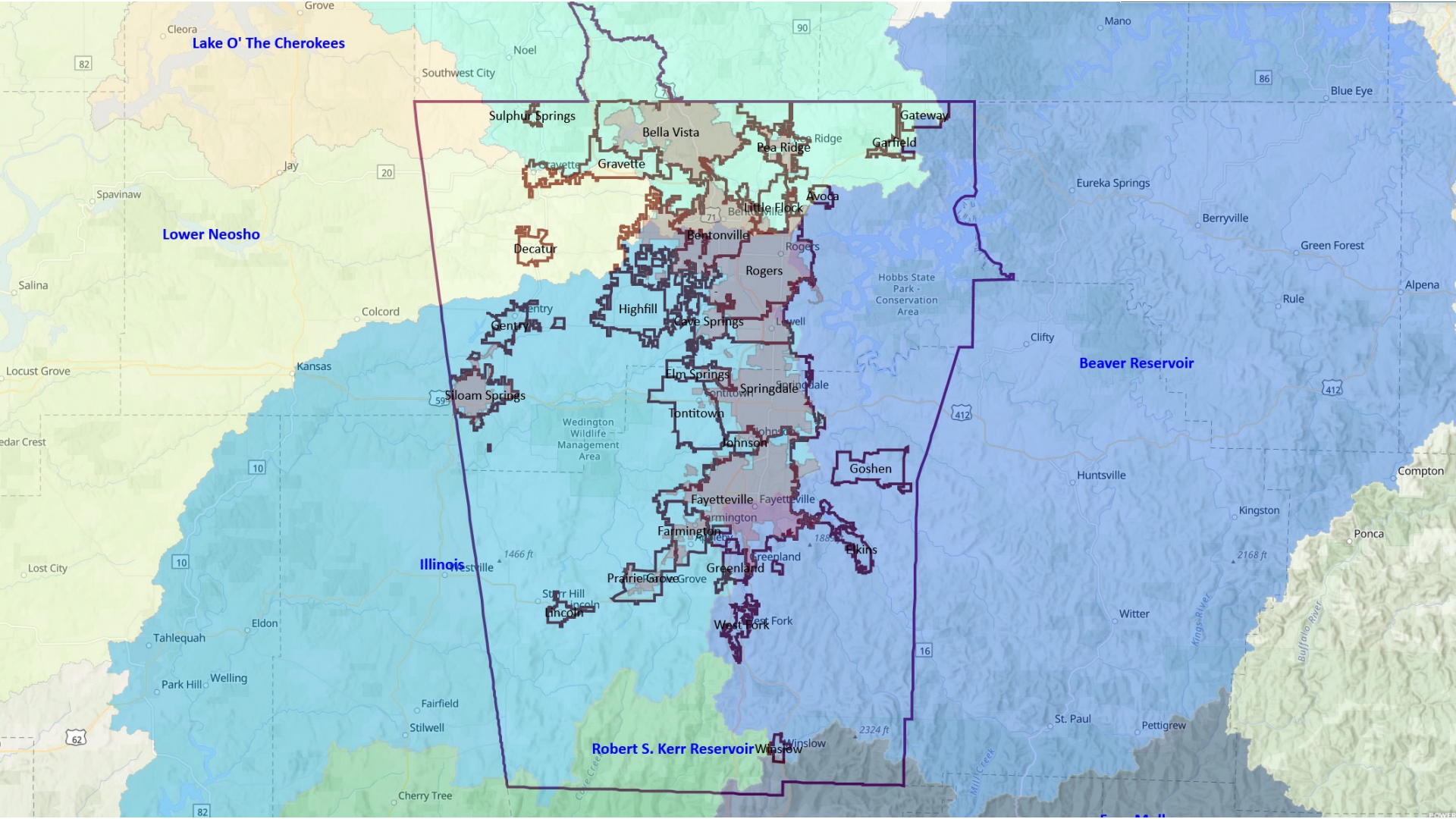
HOUSING & PEOPLE NEEDS



0.69 ACRES
13 UNITS
18.8 UNITS/ACRE

2. Think regionally (water runs downhill)





Lake O' The Cherokees

Lower Neosho

Illinois

Beaver Reservoir

Robert S. Kerr Reservoir

Sulphur Springs

Bella Vista

Gateway

Gravette

Gravette

Bea Ridge

Avoca

Garfield

Decatur

Bentonville

Rogers

Highfill

Highfill

Lowell

Elm Springs

Springdale

Tontitown

Johnson

Goshen

Fayetteville

Fayetteville

Farmingdale

Greenland

Greenland

Prairie Grove

Sumner Hill

Lincoln

West Fork

West Fork

Winslow

Winslow

Cleora

Southwest City

Noel

Mano

Blue Eye

Jay

Eureka Springs

Berryville

Green Forest

Spavinaw

Salina

Colcord

Hobbs State Park-Conservation Area

Rule

Alpena

Locust Grove

Kansas

Clifty

edar Crest

Siloam Springs

412

412

Lost City

10

Huntsville

Compton

Kingston

Ponca

1466 ft

2168 ft

Tahlequah

Eldon

Park Hill

Welling

Fairfield

Stilwell

Witter

St. Paul

Pettigrew

62

82

Cherry Tree

2324 ft

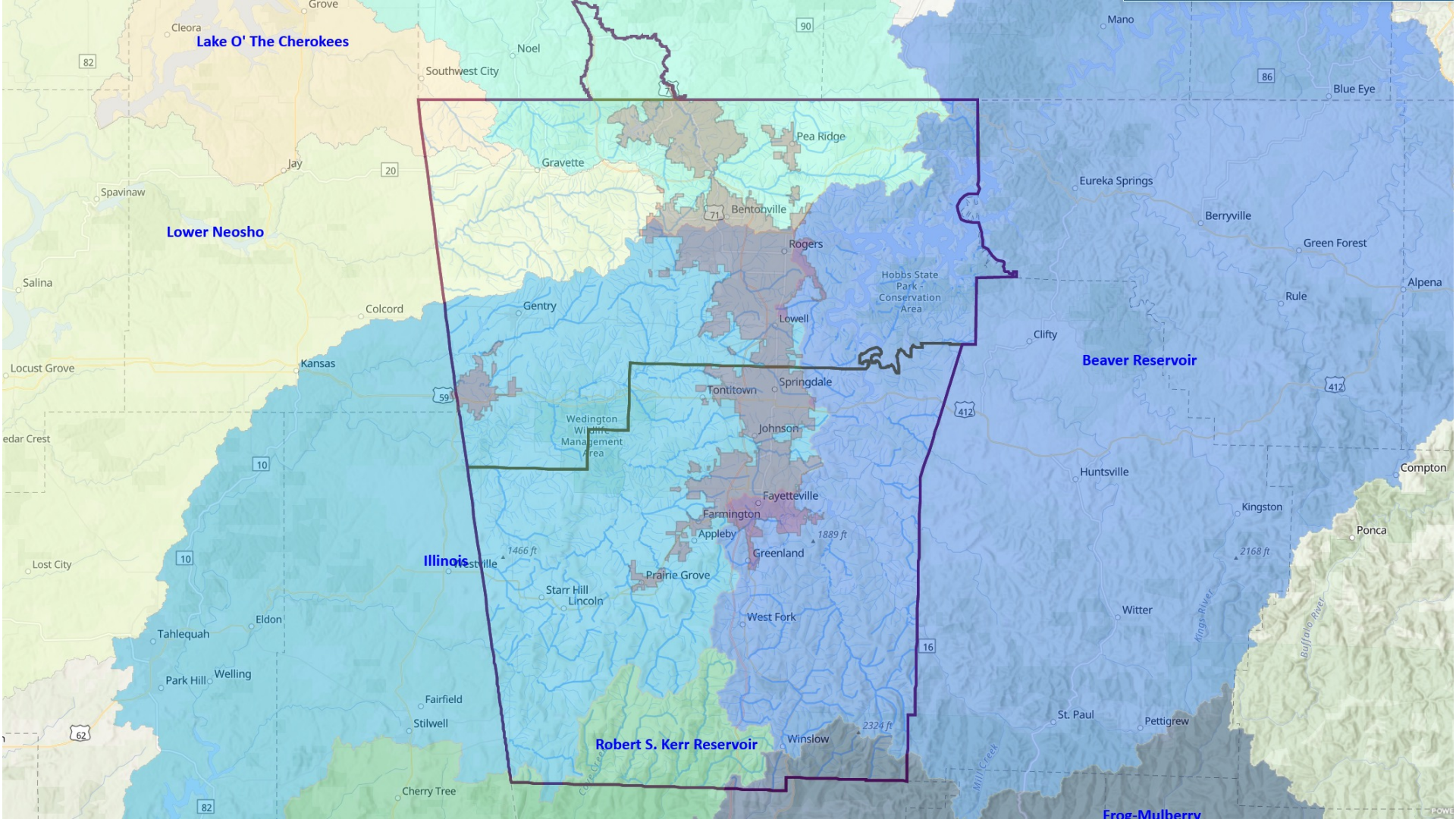
16

Mill Creek

Kings River

Buffalo River

Cole Creek



Lake O' The Cherokees

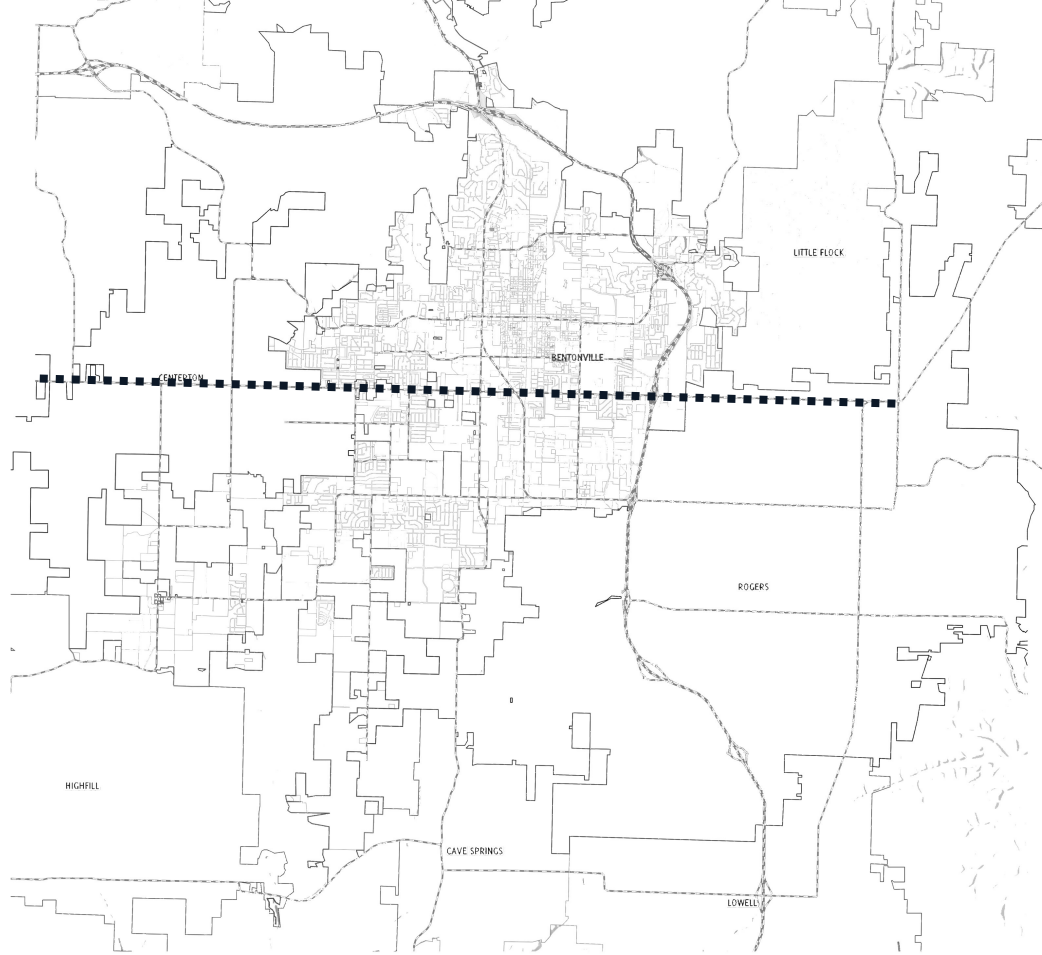
Lower Neosho

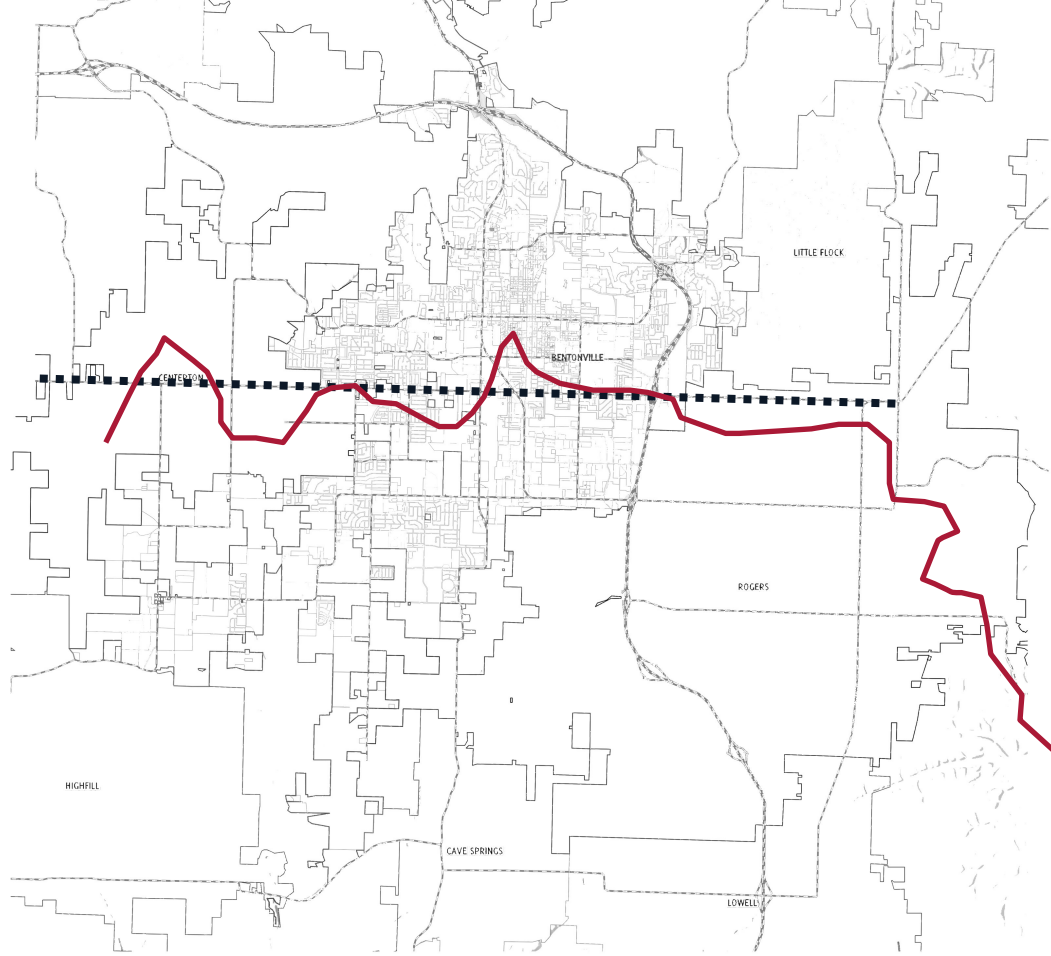
Beaver Reservoir

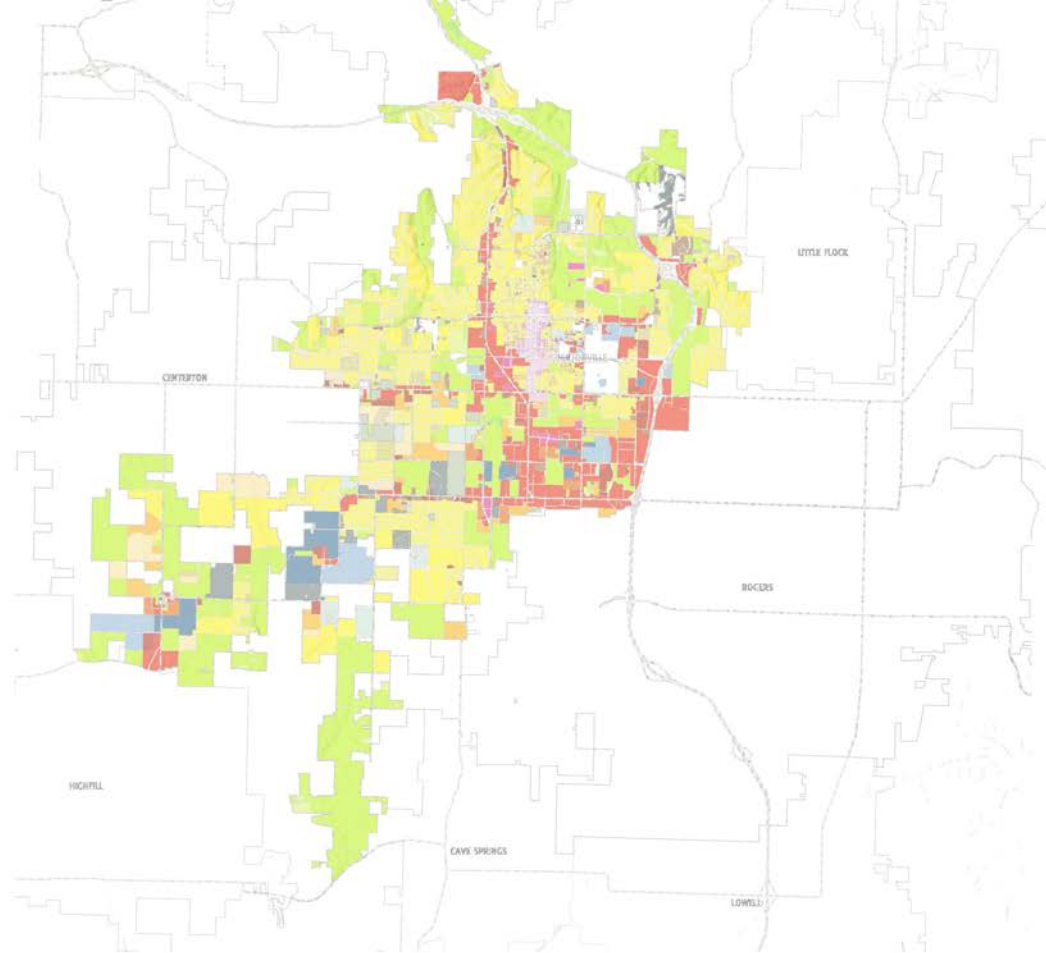
Robert S. Kerr Reservoir

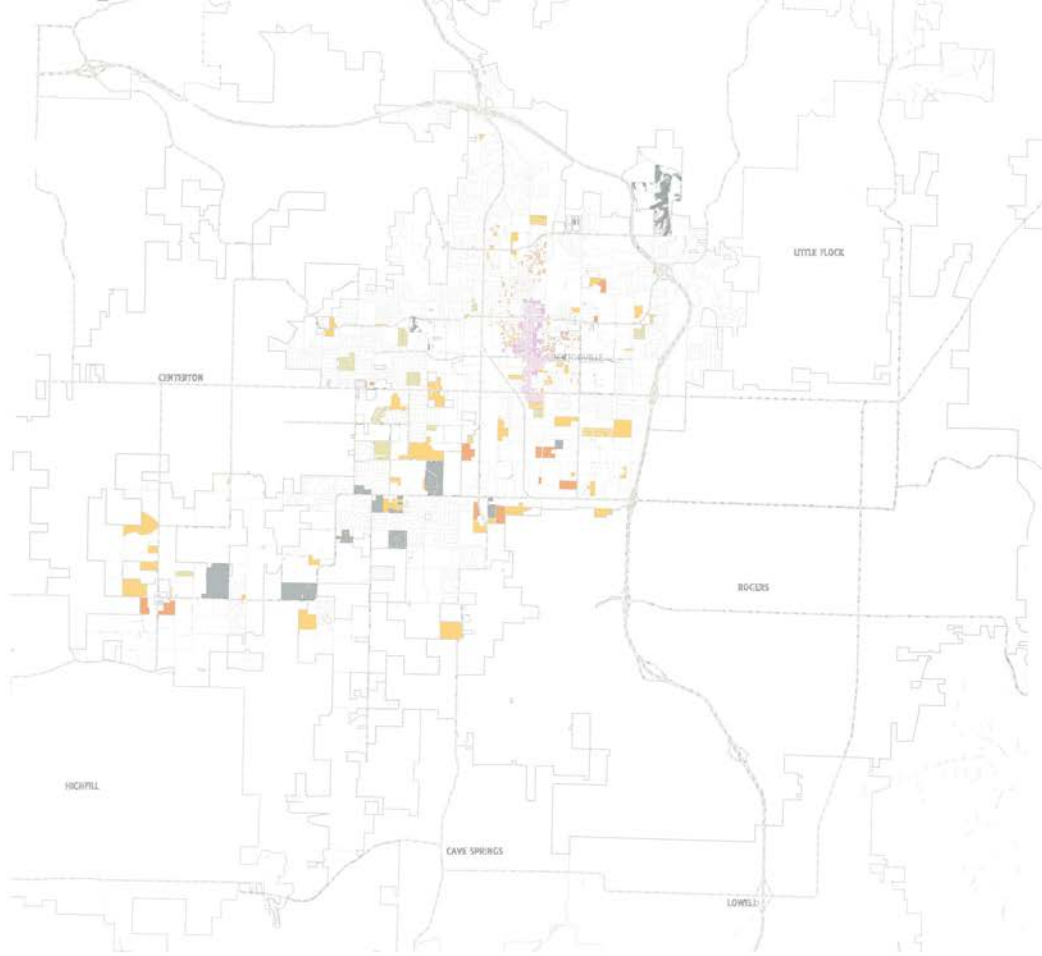
Frog-Mulberry

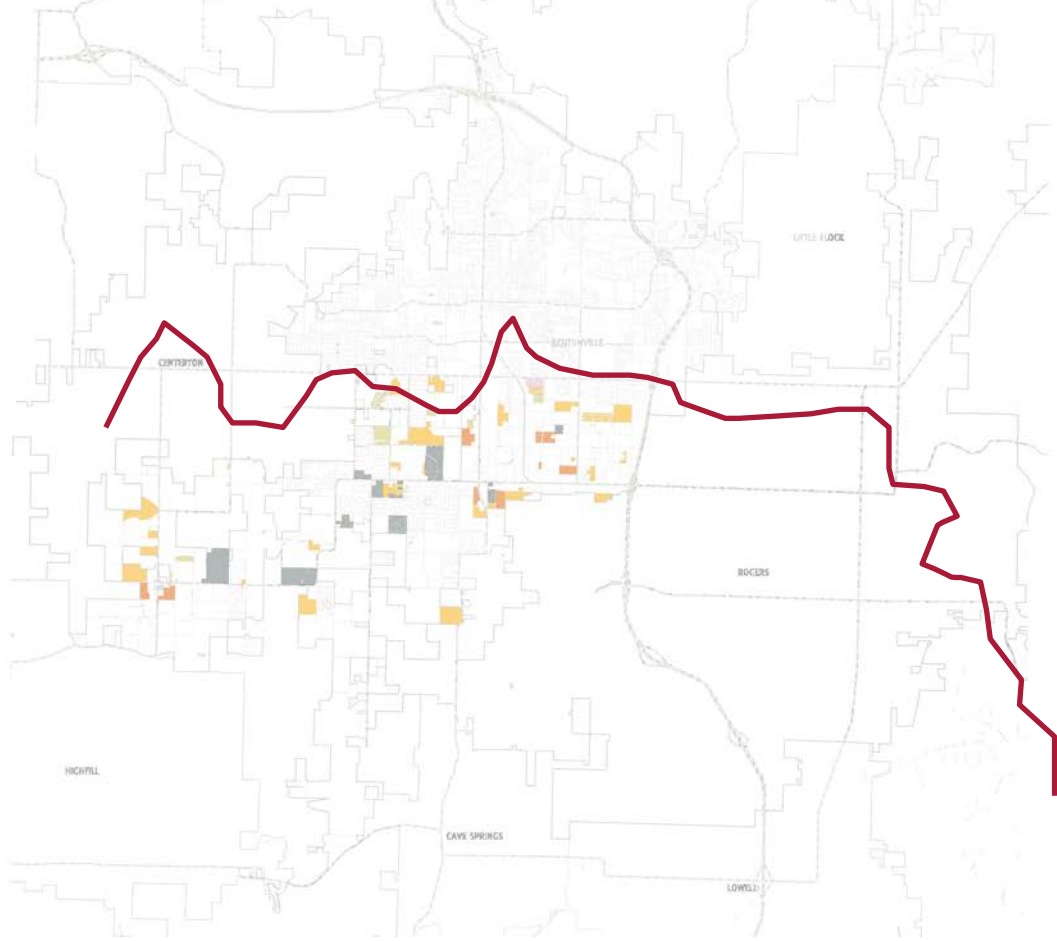








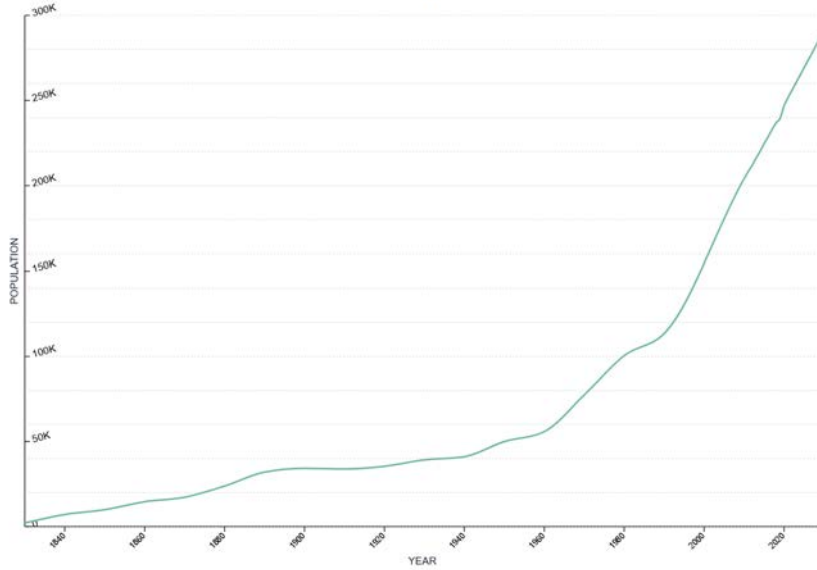




3. Embrace Density

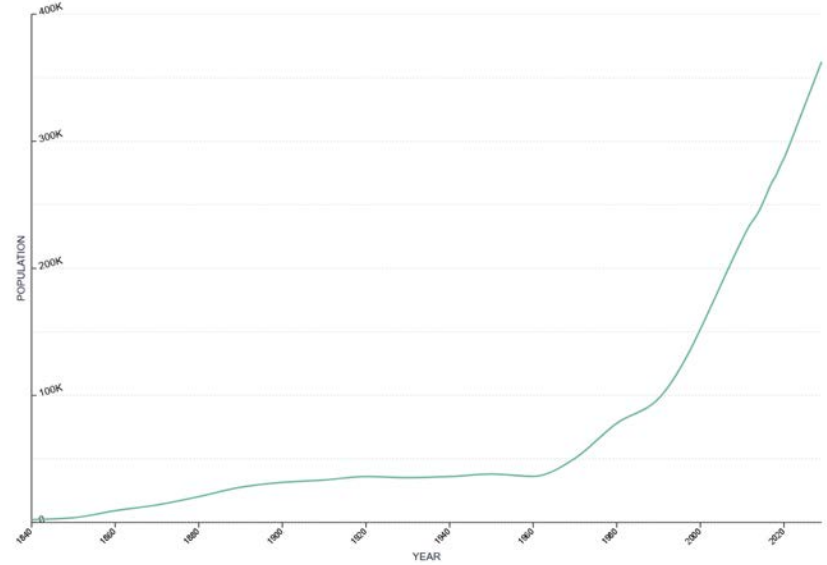


Washington County, Arkansas Population 2024
264,778



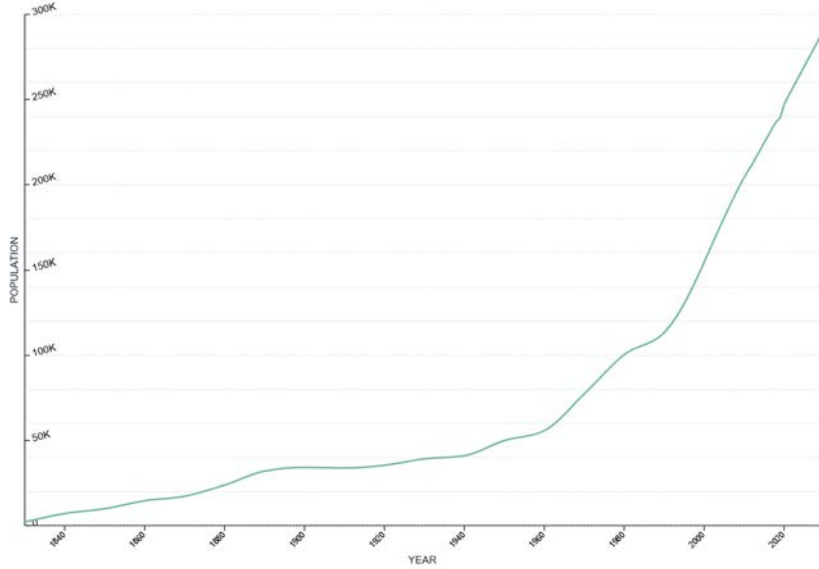
+/- 5,000
average new residents annually

Benton County, Arkansas Population 2024
319,915



+/- 8,000
average new residents annually

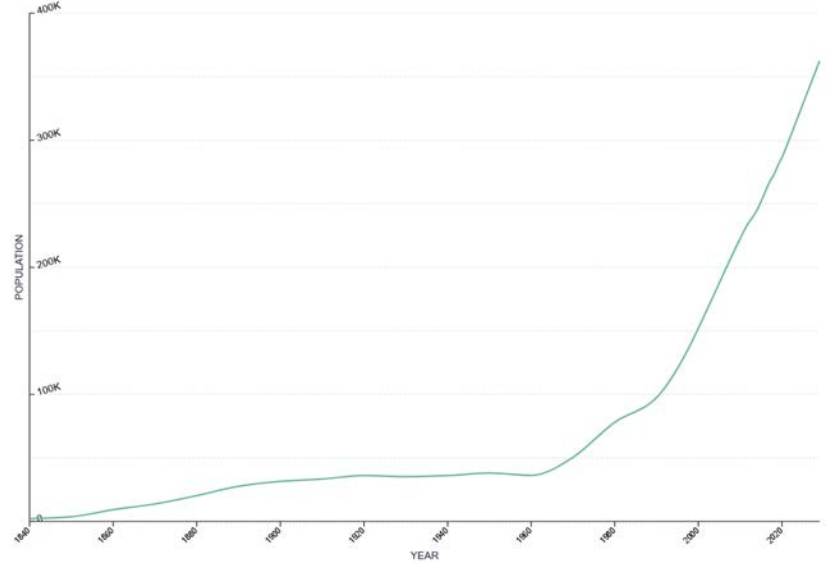
Washington County, Arkansas Population 2024
264,778



+/- 1,900

new households annually at current household size

Benton County, Arkansas Population 2024
319,915



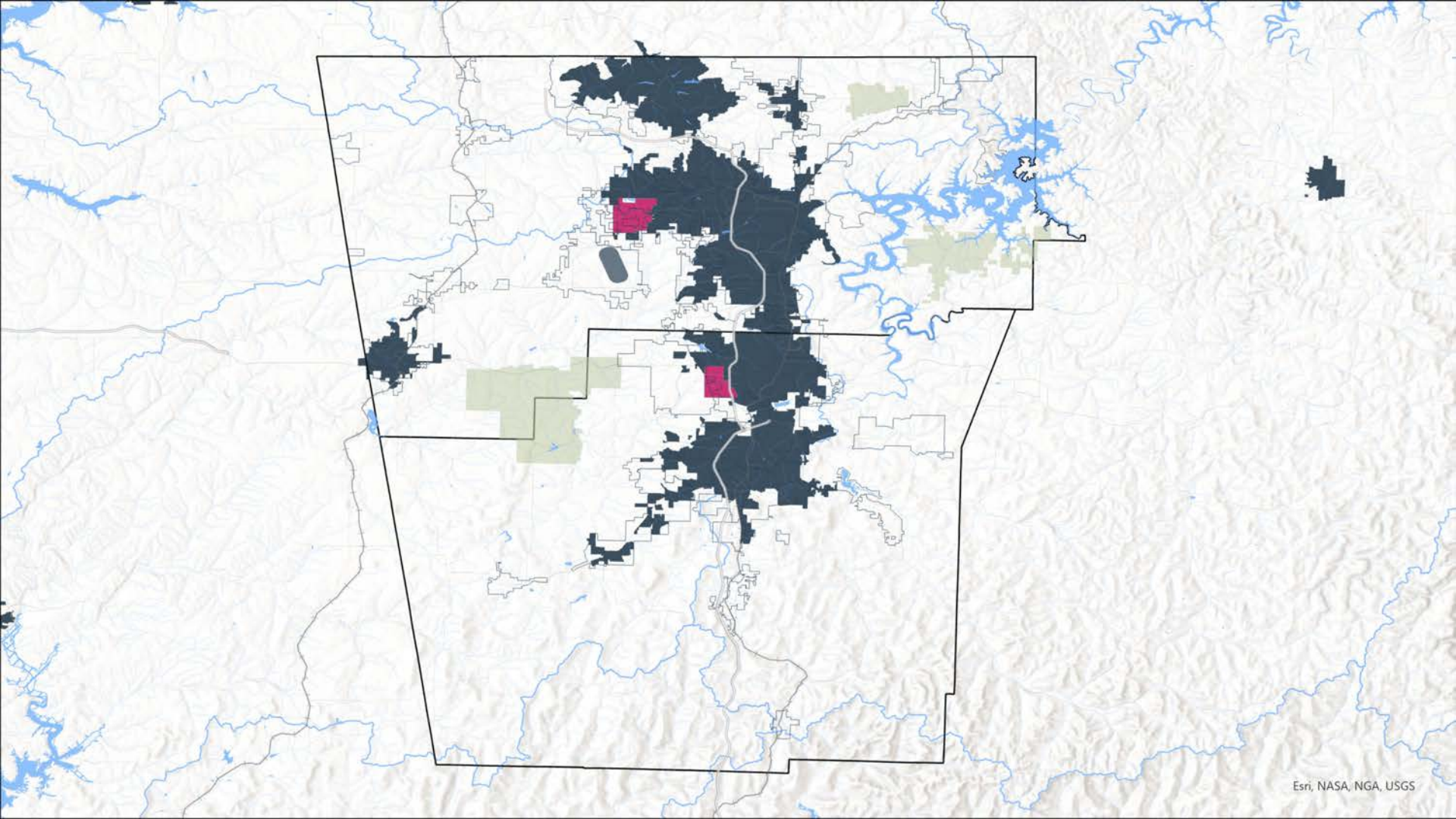
+/- 3,000

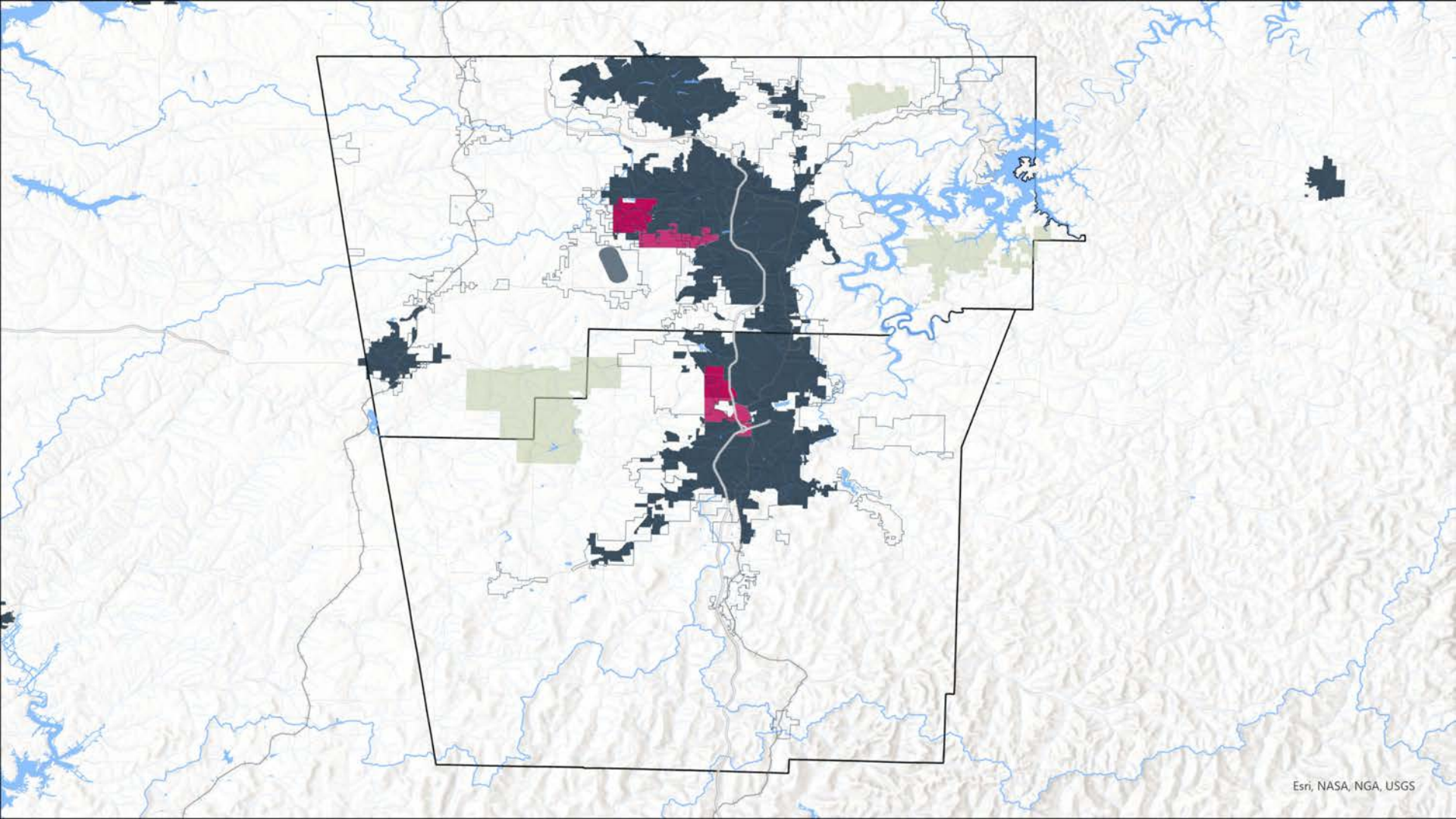
new households annually at current household size

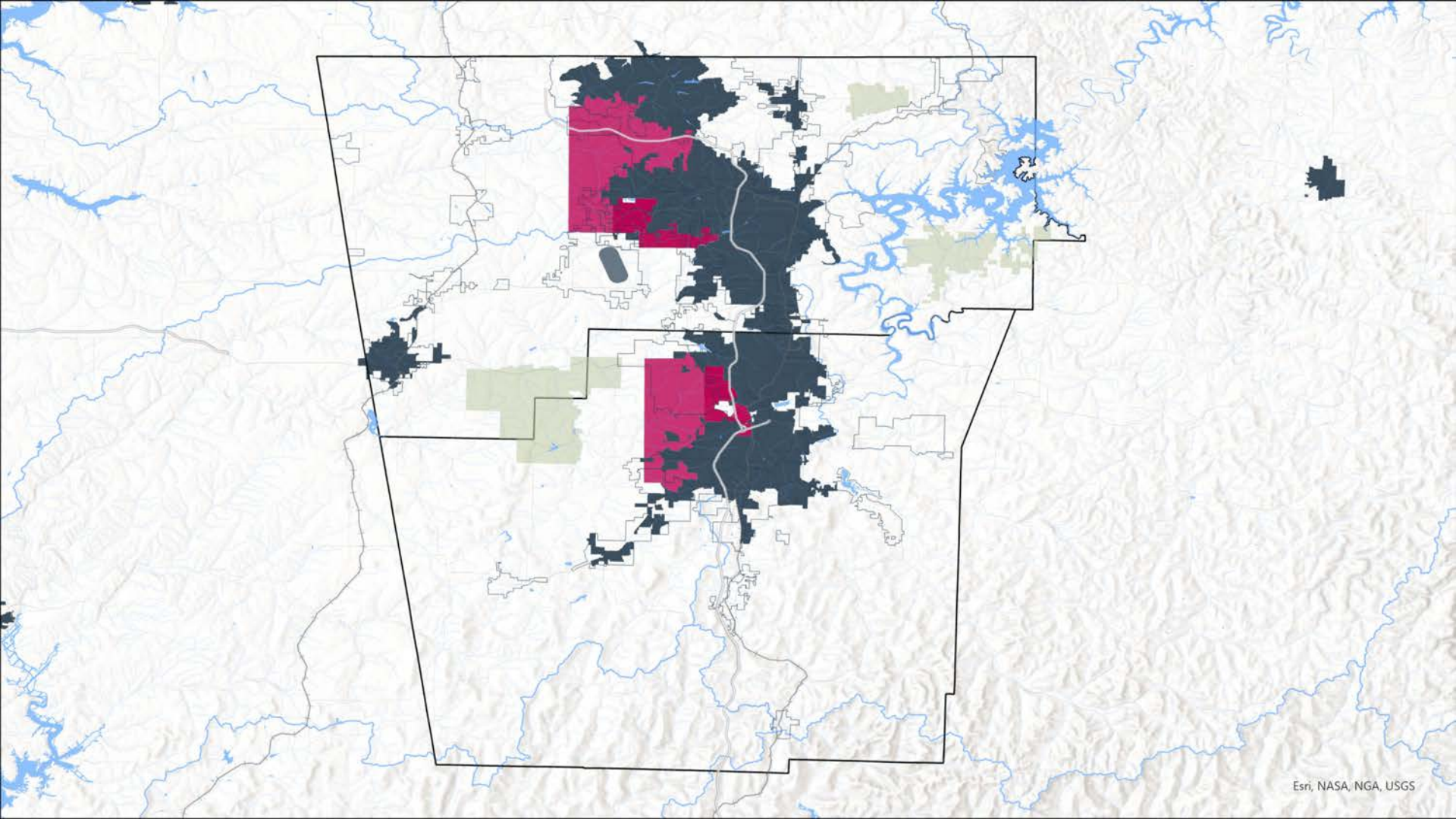


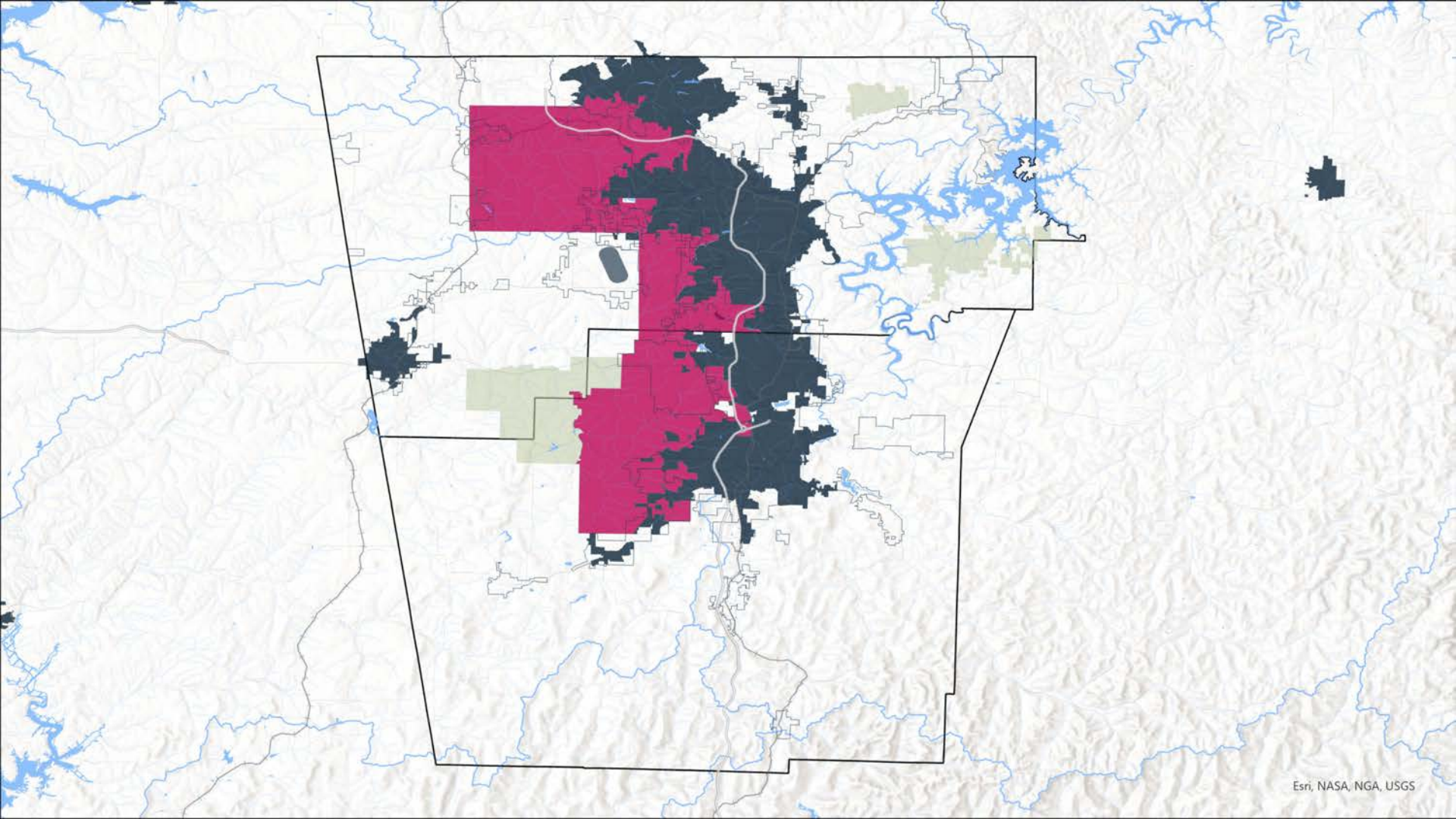
4 UNITS PER ACRE

2500 sf houses
10,890 SF LOTS











**WHAT CAN DENSITY
LOOK LIKE IF WE
GET IT RIGHT?**



194 E. South St.

18 UNITS PER ACRE

3 small lot houses

7800 SF LOT

clark partners
6767



20 UNITS PER ACRE

62 townhouses
3.25 ACRE LOT



27 UNITS PER ACRE

**4 apartments
6451 SF LOT**



31 UNITS PER ACRE

4 small lot houses

5650 SF LOT



40 UNITS PER ACRE

6 apartments + two rear ADUs

9,000 SF LOT



56 UNITS PER ACRE

2 commercial units + 4 apartments + 3 townhouses
7,020 SF LOT



**No one is coming to do
this for us.**





Alli Quinlan

Founder & Principal,
Flintlock LAB
<https://flintlocklab.com>
atq@flintlocklab.com

Resources

Incremental Development Alliance
<https://www.incrementaldevelopment.org/>

