

Razorback Greenway Corridor Plan

1. Existing Conditions Review

fieldoperations



HR&A

Razorback Greenway Corridor Plan

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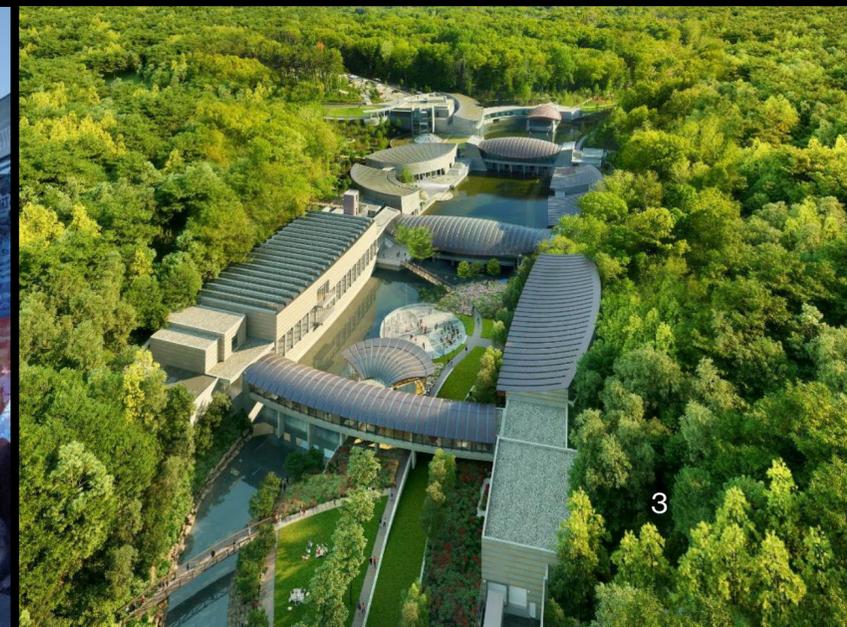
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PROJECT LEADERSHIP & PARTNERS

The Razorback Greenway Corridor Plan is guided by a collaborative effort between the Northwest Arkansas Regional Planning Commission (NWARPC), the seven cities of the region, and the Walton Family Foundation.



Existing Conditions Review

1.1 Introduction: How will we grow?

Seven cities linked by the Razorback Greenway anchor a rapidly evolving Northwest Arkansas, attracting residents and visitors with world-class trails, major cultural institutions, vibrant main streets, and major corporate hubs. Today, accelerating population growth continues to reshape the region. Resulting high living costs, uneven wage growth, and sprawling auto-oriented development have created burdens on housing, transportation, and natural systems.

In this context, the region faces a central question: **How will we grow?** This plan seeks to build on ongoing efforts to guide

Northwest Arkansas toward equitable, resilient, and well-designed growth, while safeguarding the landscapes, communities, and qualities that define the region.

The Existing Conditions Review examines foundational data, environmental systems, infrastructure networks, and economic trends to inform a forward-looking smart growth framework. The aim is to support thriving communities while protecting the natural and cultural resources that make Northwest Arkansas exceptional.

An aerial photograph of Northwest Arkansas, showing a dense network of green hills and valleys. A prominent green line traces a path through the region, starting from the north and moving south, passing through a developed urban area. The background is a mix of vibrant green and dark green, indicating different elevations and vegetation. A dashed white line runs horizontally across the top of the image.

The Central Question for the Regional Frameworks to Answer

Given rapid development, environmental challenges, and rising costs of living, Northwest Arkansas must address the following question through a forward-looking framework that preserves and amplifies the region's distinct character.

HOW WILL WE GROW?

NATURAL BEAUTY

A hallmark of Northwest Arkansas is the region's extraordinary access to nature and outdoor recreation opportunities. The area sits at the northern edge of the Boston Mountains and southern portion of the Ozark Highlands, creating a diverse landscape of forested hills, valleys, bluffs, and karst features. The region is home to world-class mountain biking trails, including the OZ Trails network, which attracts visitors from across the country. Notable natural areas include Devil's Den State Park, Hobbs State Park-Conservation Area, and the Buffalo National River just east of the region.



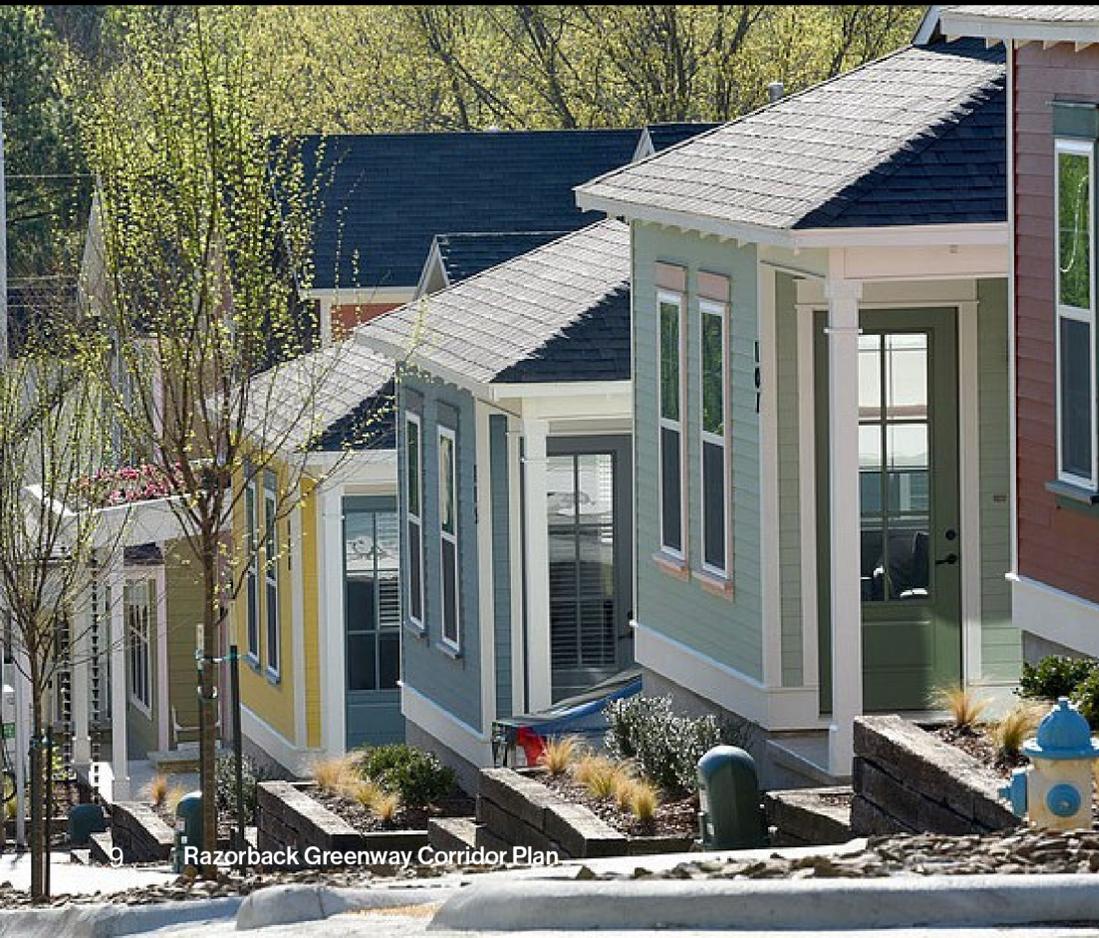
CULTURAL ASSETS

Northwest Arkansas is home to renowned cultural destinations that would typically only be found in much larger metropolitan areas. Crystal Bridges Museum of American Art houses a world-class collection in a stunning architectural setting integrated with the natural landscape. The Scott Family Amazeum provides interactive educational experiences for children and families. The University of Arkansas in Fayetteville further enriches the cultural scene with sports events, theatrical performances, musical events, and the Walton Arts Center.



CITIES AND TOWNS

Seven cities, connected by the Razorback Greenway, comprise the core of Northwest Arkansas. Fayetteville, Bentonville, Rogers, and Springdale anchor the region with major educational, corporate, commercial, and cultural institutions, while Johnson is mainly residential with a growing trail network, and Lowell serves as a logistics hub. Bella Vista has a growing young population, as well as extensive natural amenities, including lakes, trails, and golf courses.



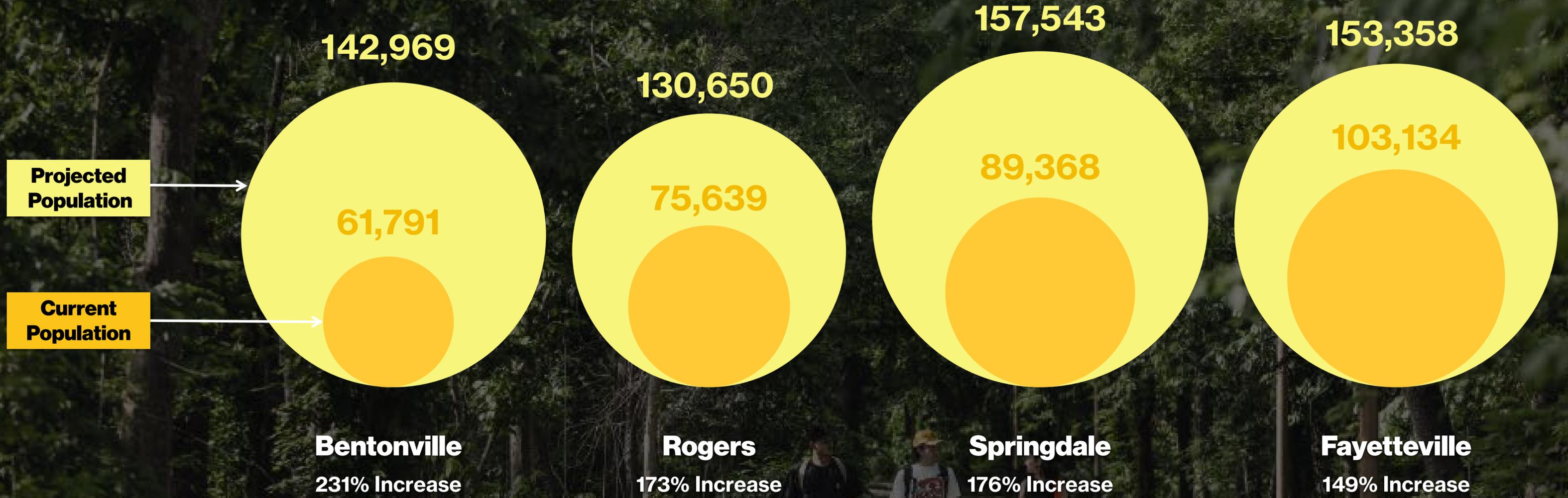
RECENT GROWTH IN BENTON AND WASHINGTON COUNTIES

NWA jobs and population have grown in tandem over the past decade, far outpacing national growth.



PROJECTED GROWTH IN THE COMING DECADES

Growth is projected to continue over the next two decades. This growth will dramatically change the size of the region's four largest cities.

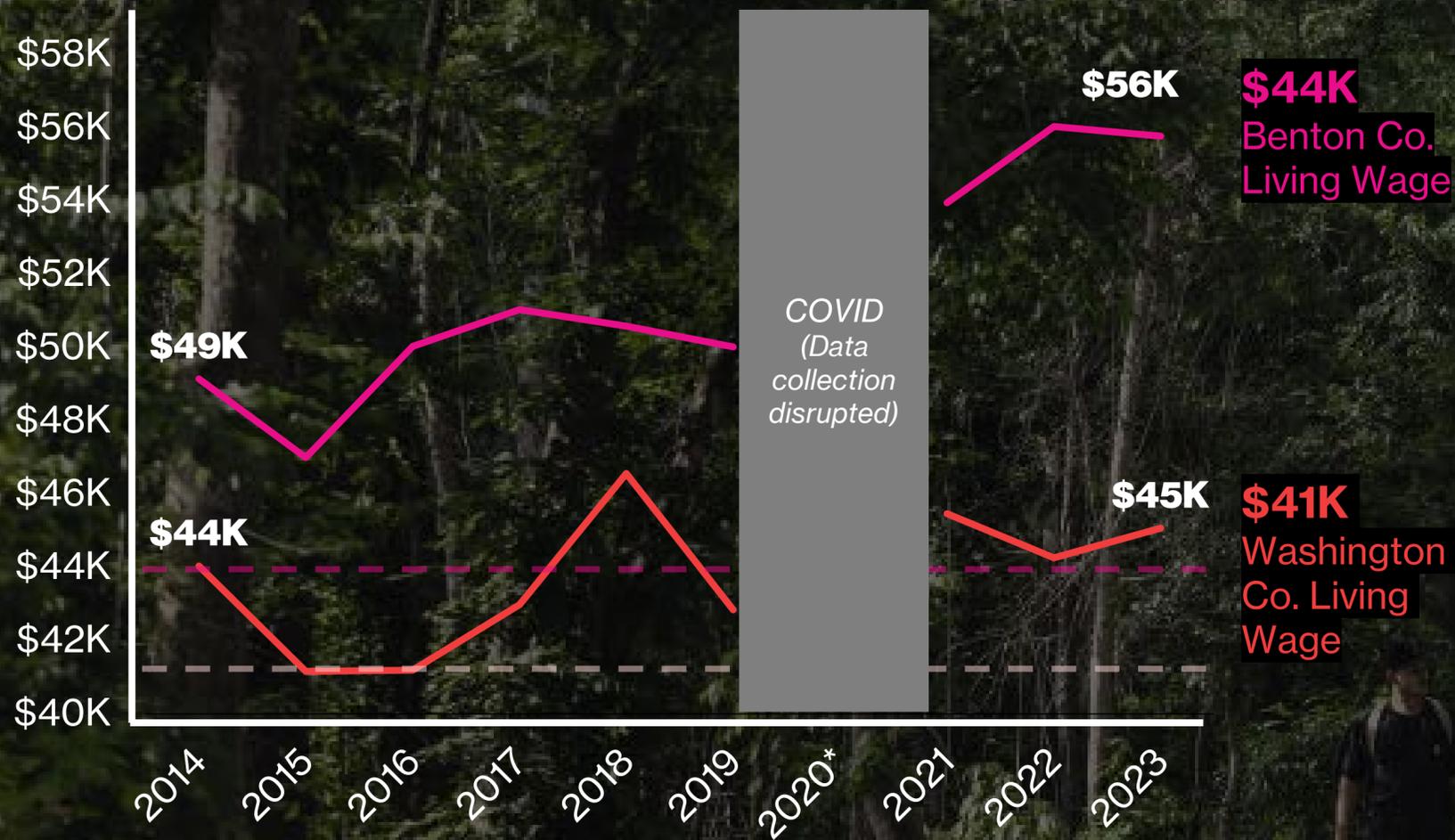


Source: Forward2050 Metropolitan Transportation Plan, NWARPC, 2025.

GROWING AFFORDABILITY CHALLENGES

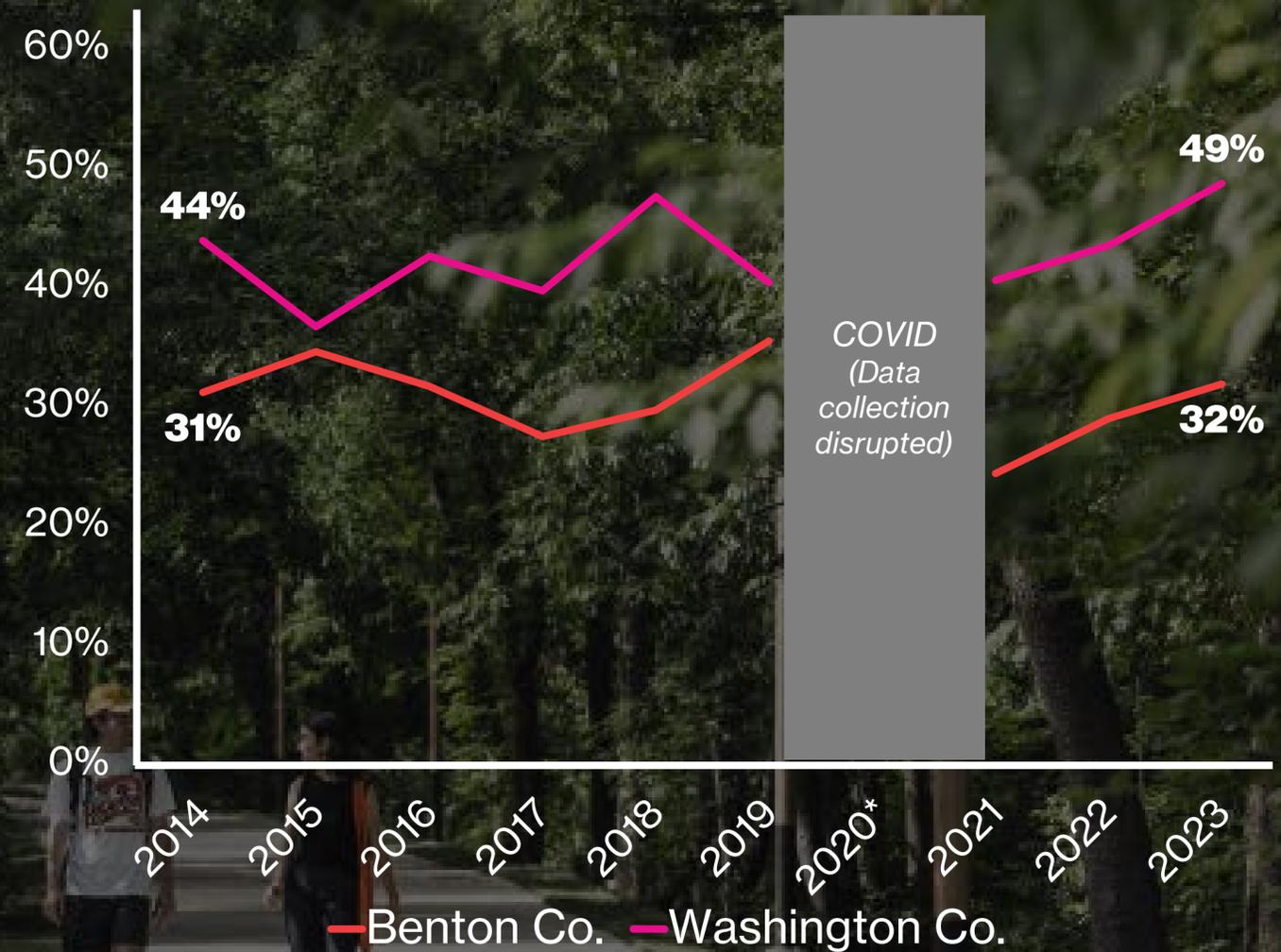
Wages have risen in the past ten years, but growth is uneven across the two counties and has been outpaced by increases to cost of living.

Median Earnings (Inflation Adjusted) (2014-23) vs. Living Wages (2024) by County



Sources: ACS 1-yr Estimates; Social Explorer; MIT Living Wage Calculator.
 Note: Inflation adjusted dollar figures are in constant 2023 dollars.
 Note: Annual living wages shown are for an individual in a household with 2 working adults and 2 children.

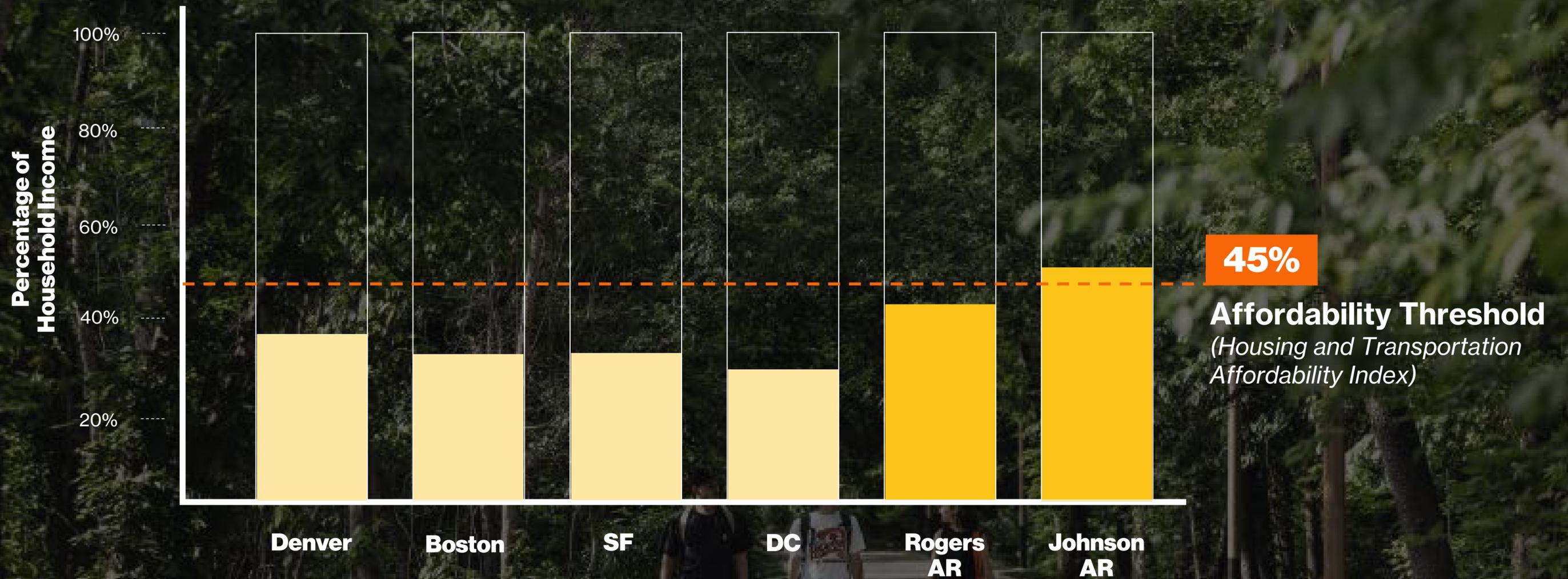
Share of Rent-Burdened Households by County** (2014-23)



*Data not available for 2020 because data collection by the U.S. Census Bureau was disrupted by the COVID-19 pandemic.
 **Rent-burdened renter households pay 30% or more of household income in rent.

HIGH COSTS OF HOUSING AND TRANSPORTATION

Affordability can be measured in more than the cost of housing. Combined housing and transportation costs in NWA exceed large, coastal cities.



Source: The Center for Neighborhood Technology's Housing and Transportation (H+T®) Affordability Index

THE CHALLENGE OF LIVING IN NWA

73% of Northwest Arkansas residents work in the seven cities, but only 51% of Northwest Arkansas workers live in those cities. This suggests some workers must find housing in outlying areas, potentially due to more affordable housing.

Where Northwest Arkansas Residents Work (2022)

| | |
|--------------|-------|
| Fayetteville | (20%) |
| Bentonville | (18%) |
| Springdale | (16%) |
| Rogers | (14%) |
| Lowell | (4%) |
| Bella Vista | (1%) |
| Johnson | (1%) |

73% of NWA Residents Work in Seven Cities

Where Northwest Arkansas Workers Live (2022)

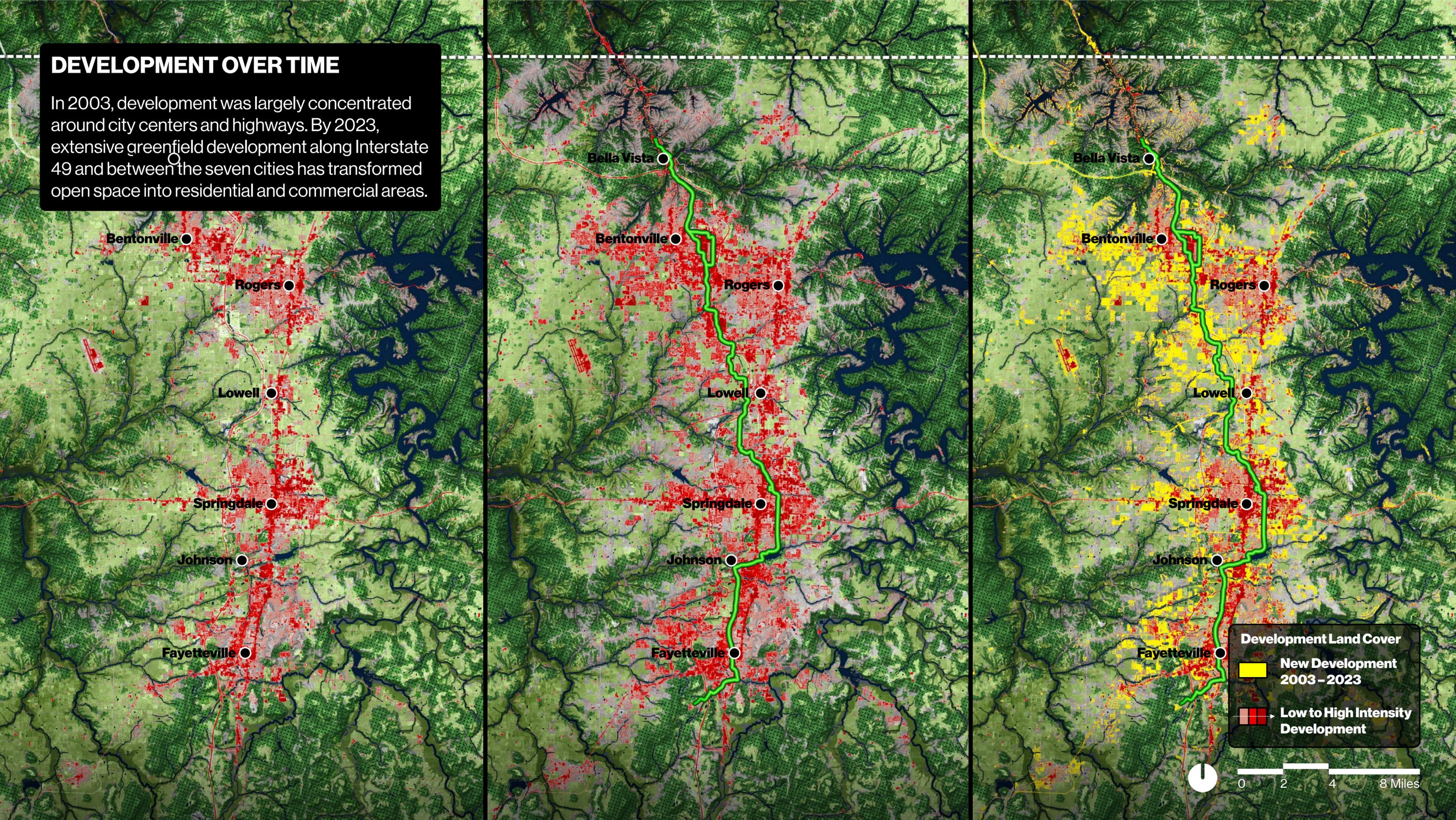
| | |
|--------------|-------|
| Fayetteville | (13%) |
| Springdale | (13%) |
| Rogers | (11%) |
| Bentonville | (9%) |
| Bella Vista | (4%) |
| Lowell | (2%) |
| Johnson | (1%) |

51% of NWA Workers Live in Seven Cities

Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD).
Northwest Arkansas is defined as Benton and Washington Counties

DEVELOPMENT OVER TIME

In 2003, development was largely concentrated around city centers and highways. By 2023, extensive greenfield development along Interstate 49 and between the seven cities has transformed open space into residential and commercial areas.



Development Land Cover

- New Development 2003-2023
- Low to High Intensity Development



ENVIRONMENTAL CHALLENGES

Due to rapid urbanization and climate change, NWA faces a number of environmental challenges, including (1) habitat fragmentation, (2) creek erosion, (3) surface and groundwater pollution, (4) rising temperatures and (5) increased flooding.

As the region grows, these challenges will become increasingly acute. Preserving open space, enhancing natural systems, and building green infrastructure will build resilience and support smart growth across the region.

Habitat Fragmentation

1

Creek Erosion

2

Surface & Groundwater Pollution

3

Rising Temperatures

4

Flooding

5

Existing Conditions Review

1.2 Background & Planning Context

Over the past decade, Northwest Arkansas transformed segments of local trails into more than a 40-mile long continuous greenway that now connects seven cities. Strategic investments, including Walton Family Foundation support and a 2010 TIGER grant, accelerated this endeavor into a defining regional asset.

Designed as a separated 12-foot shared-use path, the Greenway offers a safe and

comfortable experience for walking and riding through varied neighborhood types, though it remains used primarily for recreation rather than daily transportation.

Community feedback highlights the opportunity to pair new open space, retail, and cultural amenities with future housing and mixed-use development along the corridor.

A REMARKABLE ACCOMPLISHMENT

In just 10 years, the region came together to create 40+ miles of continuous greenway, spanning three watersheds, seven cities, and connecting approximately 230,000 people who live within a 15-minute bike ride of the trail.

MISSOURI

OKLAHOMA
ARKANSAS

BENTON CO.
WASHINGTON CO.

Bella Vista

Bentonville

Rogers

Lowell

Springdale

Johnson

Fayetteville

40 miles

10 years

\$38+ million invested

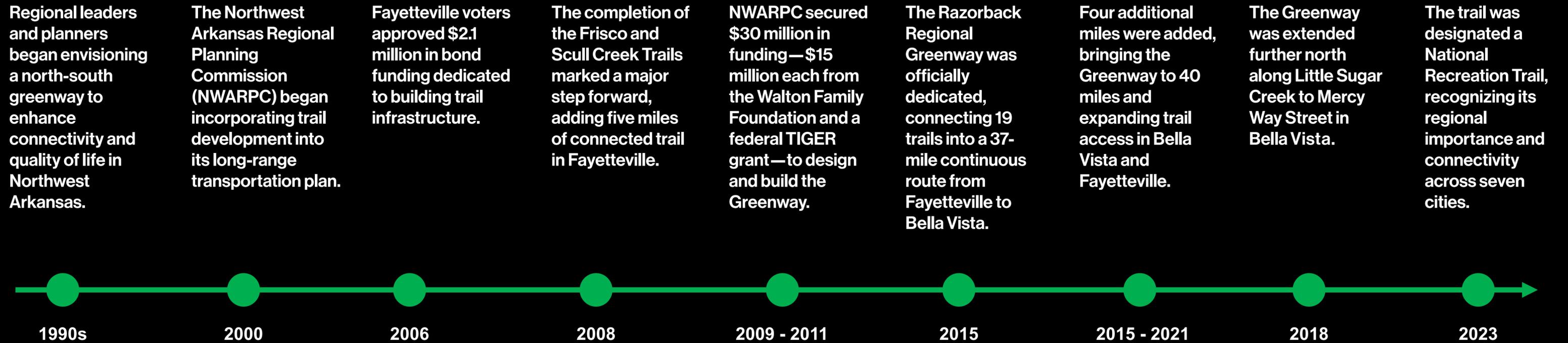
7 cities

3 watersheds

230,000+ people

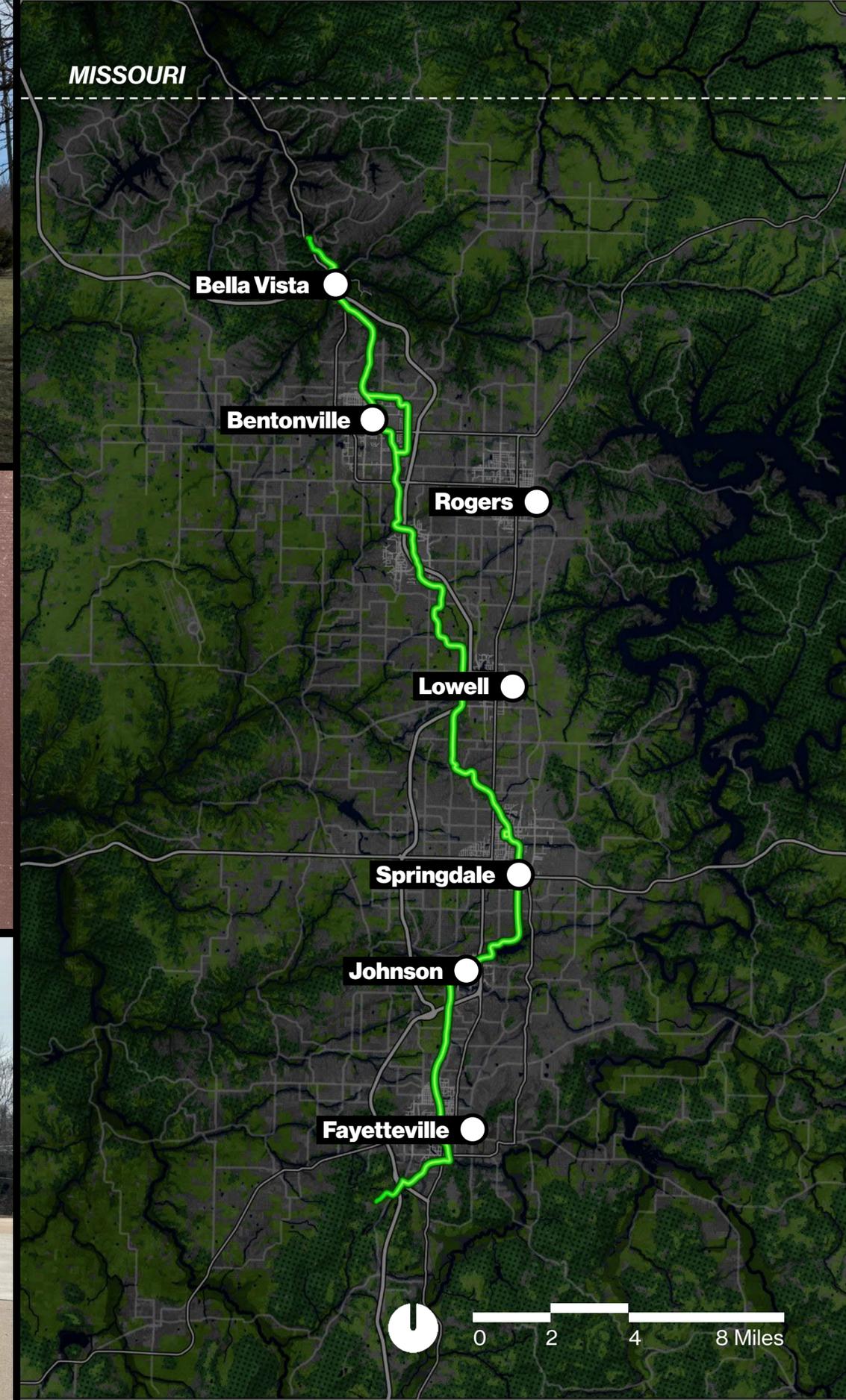
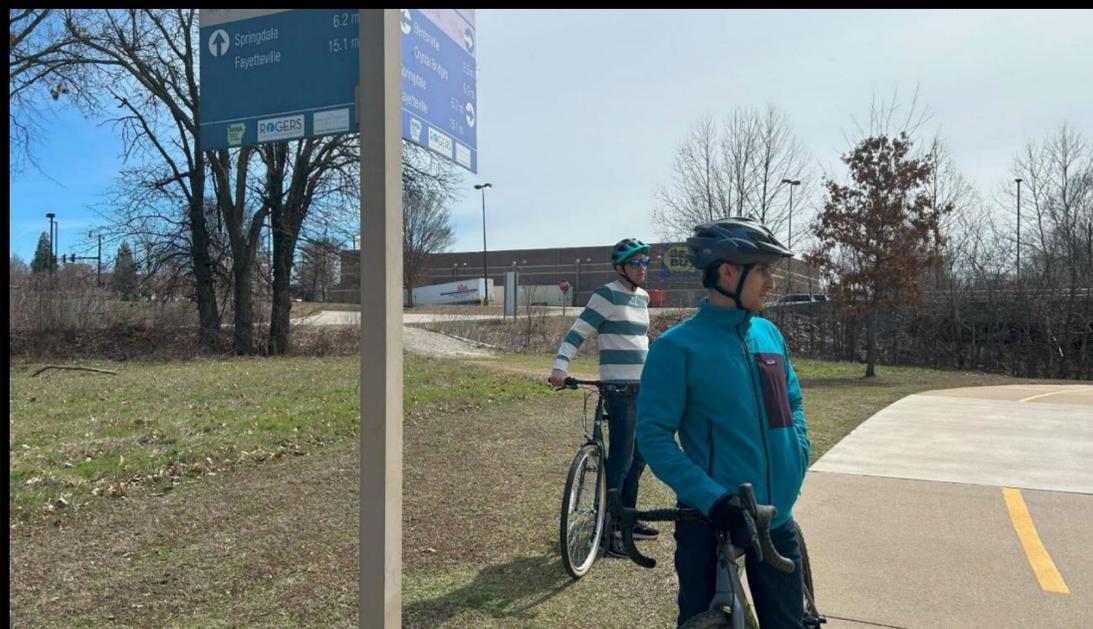
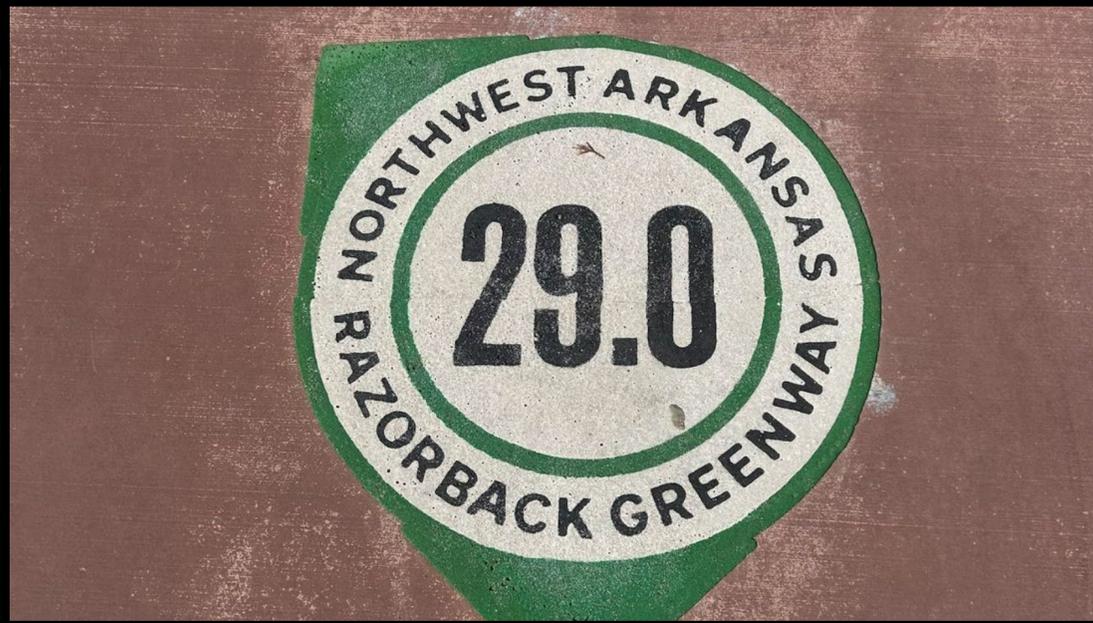
TIMELINE OF GREENWAY DEVELOPMENT

The Razorback Greenway began in the early 2000s as disconnected local trail segments that were gradually linked into a unified regional corridor. Strategic gap-filling and major investments—including Walton Family Foundation support and a 2010 federal TIGER grant—accelerated construction across the seven cities. The continuous 40-mile route was completed in 2015, with ongoing improvements and extensions continuing today.



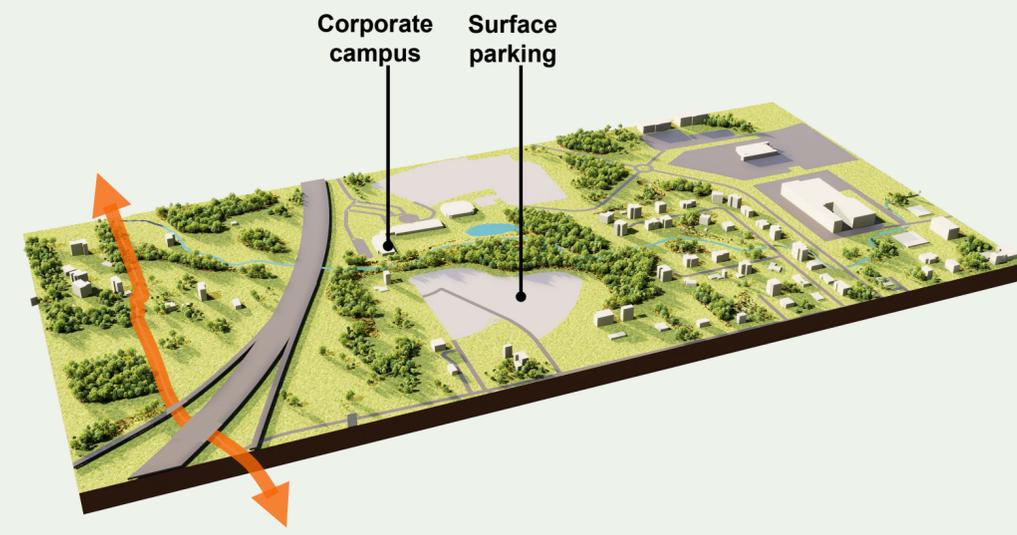
THE GREENWAY TODAY

The Greenway typically consists of a 12-foot wide shared-use trail designed for both pedestrians and cyclists. Nearly all of the trail is separated from roadways, providing a safe and comfortable experience for users of all ages and abilities.

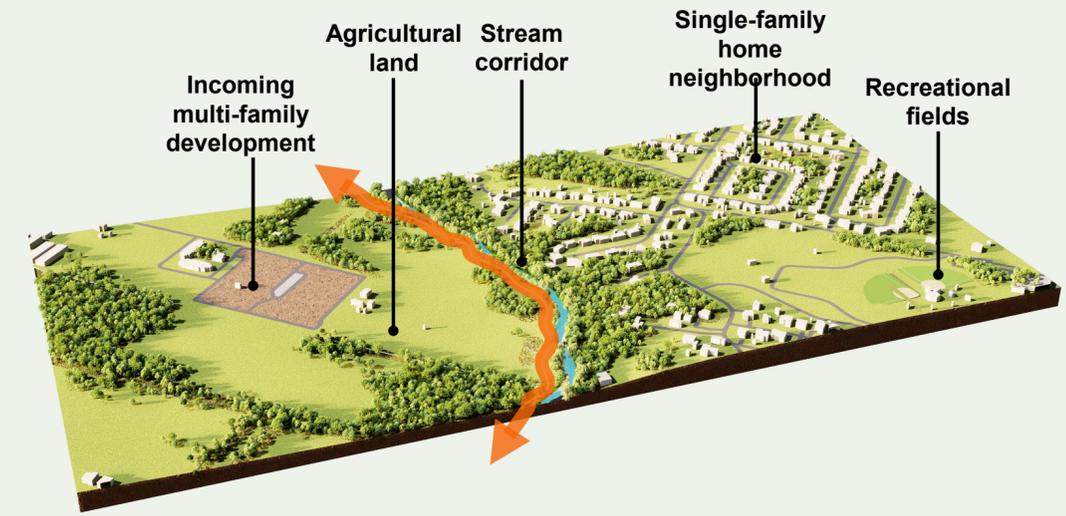


THE GREENWAY TODAY

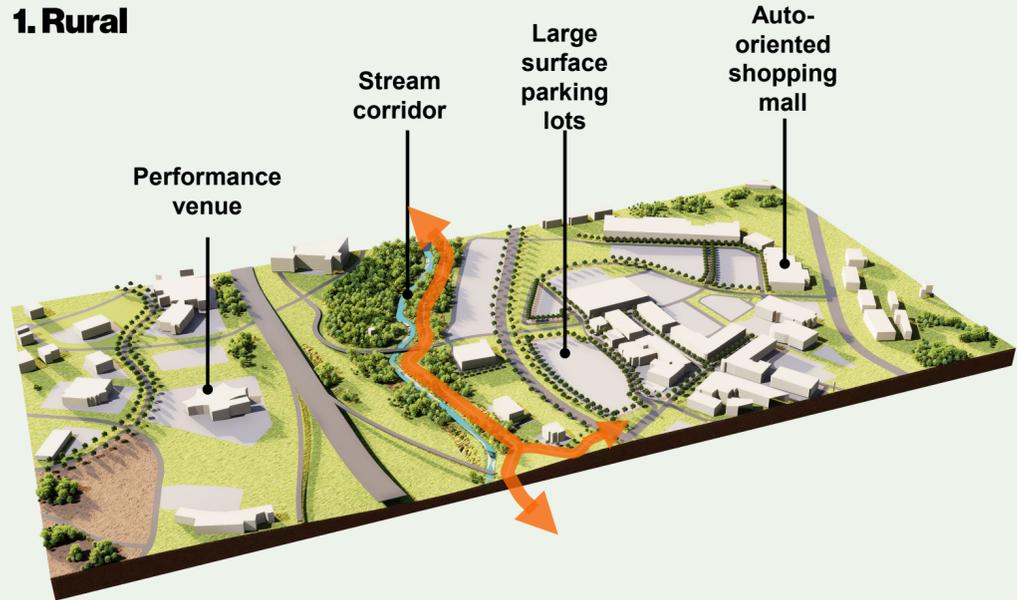
The Greenway moves through a wide range of contexts, including downtowns, commercial corridors, established neighborhoods, rural edges, and creek landscapes — each with their own development pattern and ecological conditions. These differences will call for tailored approaches to create a vibrant Greenway Corridor.



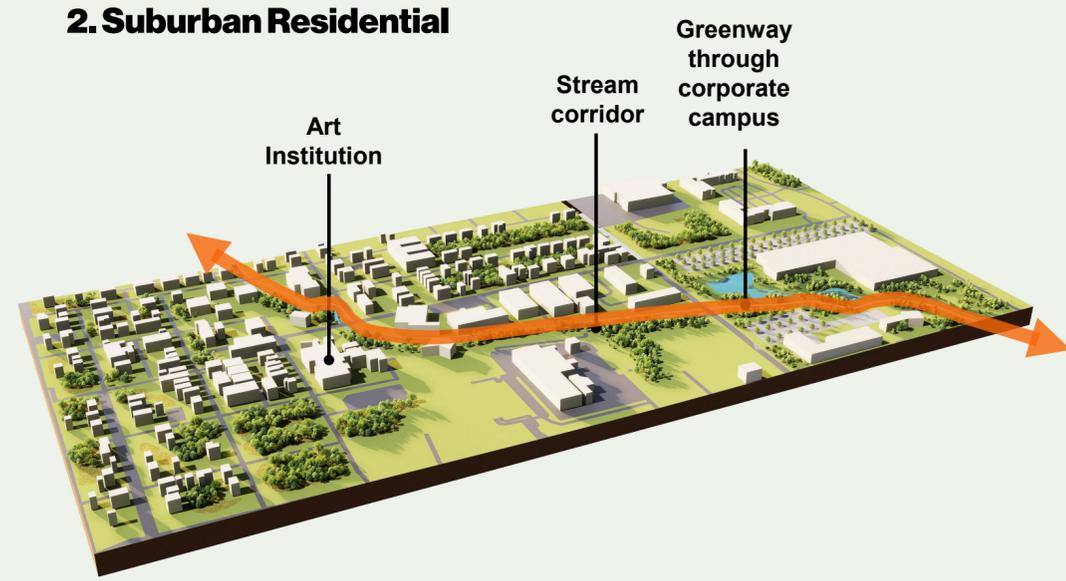
1. Rural



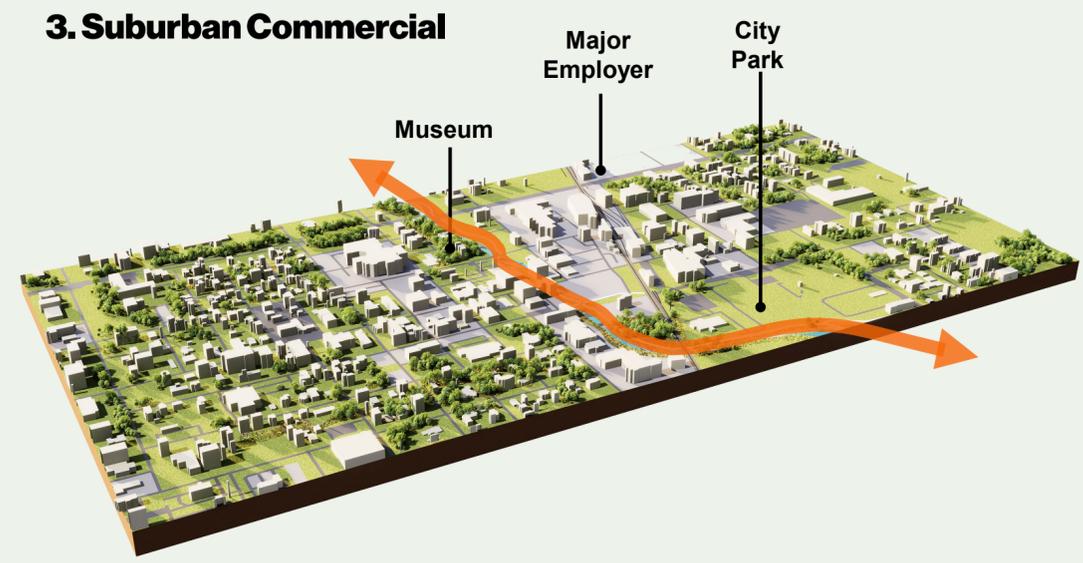
2. Suburban Residential



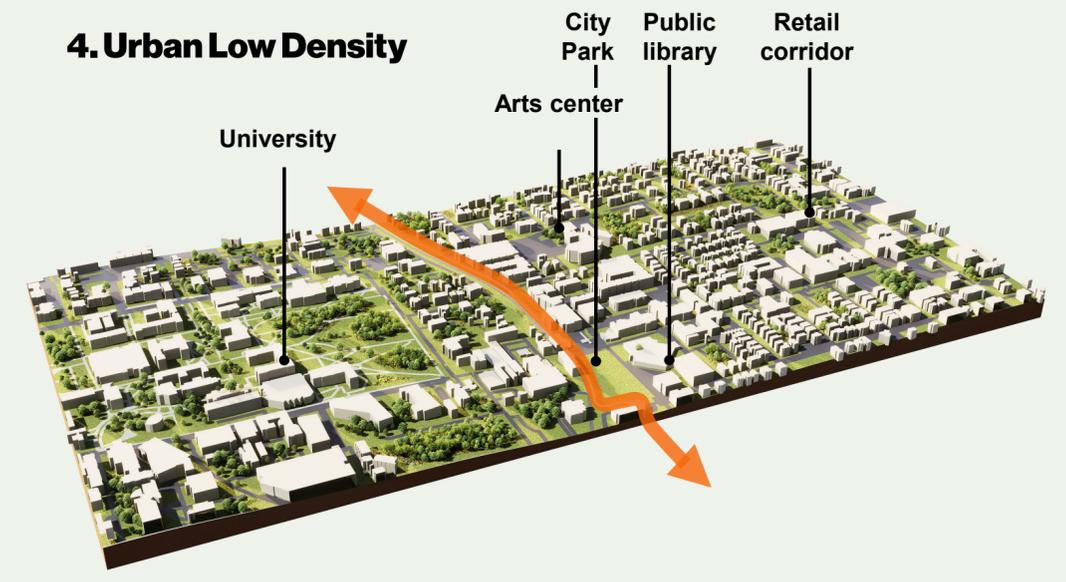
3. Suburban Commercial



4. Urban Low Density



5. Urban Medium Density



6. Urban Highest Density

Existing Conditions Review

1.3 Open Space and Natural Resources

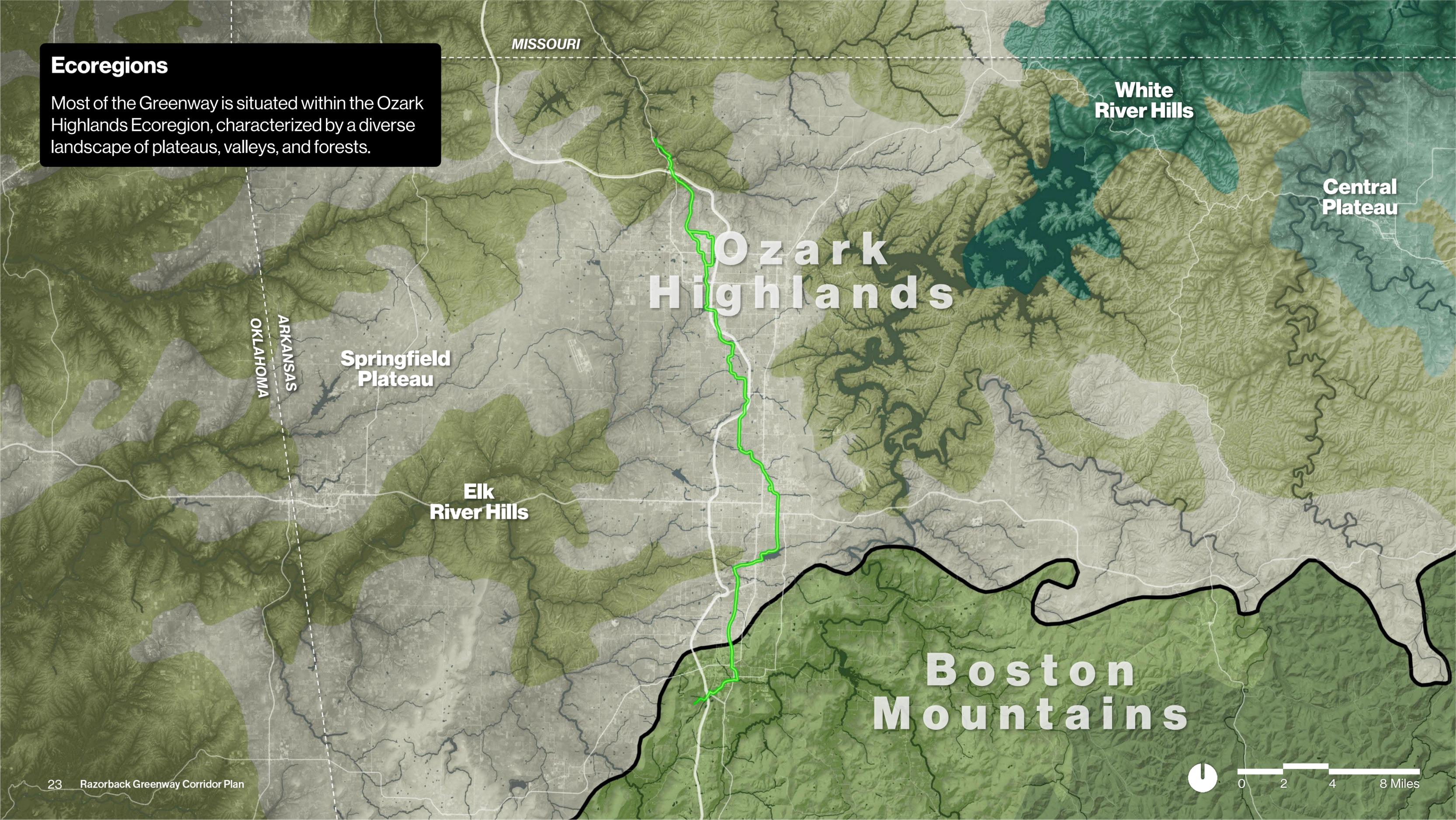
The Greenway sits in an ecologically-distinctive landscape, where the Ozark Highlands' plateaus, valleys, creek corridors, and forests shape outdoor recreation, trail experience, and patterns of neighborhood growth.

Steep eastern slopes direct new construction westward into flatter terrain. Because the greenway corridor follows the upper edges of three watersheds and crosses numerous creeks, interventions within its alignment will carry an outsized responsibility for downstream water quality and long-term ecological health.

These conditions make conservation, stormwater management, and strategic

open-space preservation essential components of future development along the corridor. The Plan offers a key opportunity to align and build on regional conservation goals, including ongoing EPA-funded CPRG projects and the 2016 Open Space Plan, with priorities for smart neighborhood growth that accommodates a growing population.

Ecoregions
Most of the Greenway is situated within the Ozark Highlands Ecoregion, characterized by a diverse landscape of plateaus, valleys, and forests.



MISSOURI

White
River Hills

Central
Plateau

Ozark
Highlands

Springfield
Plateau

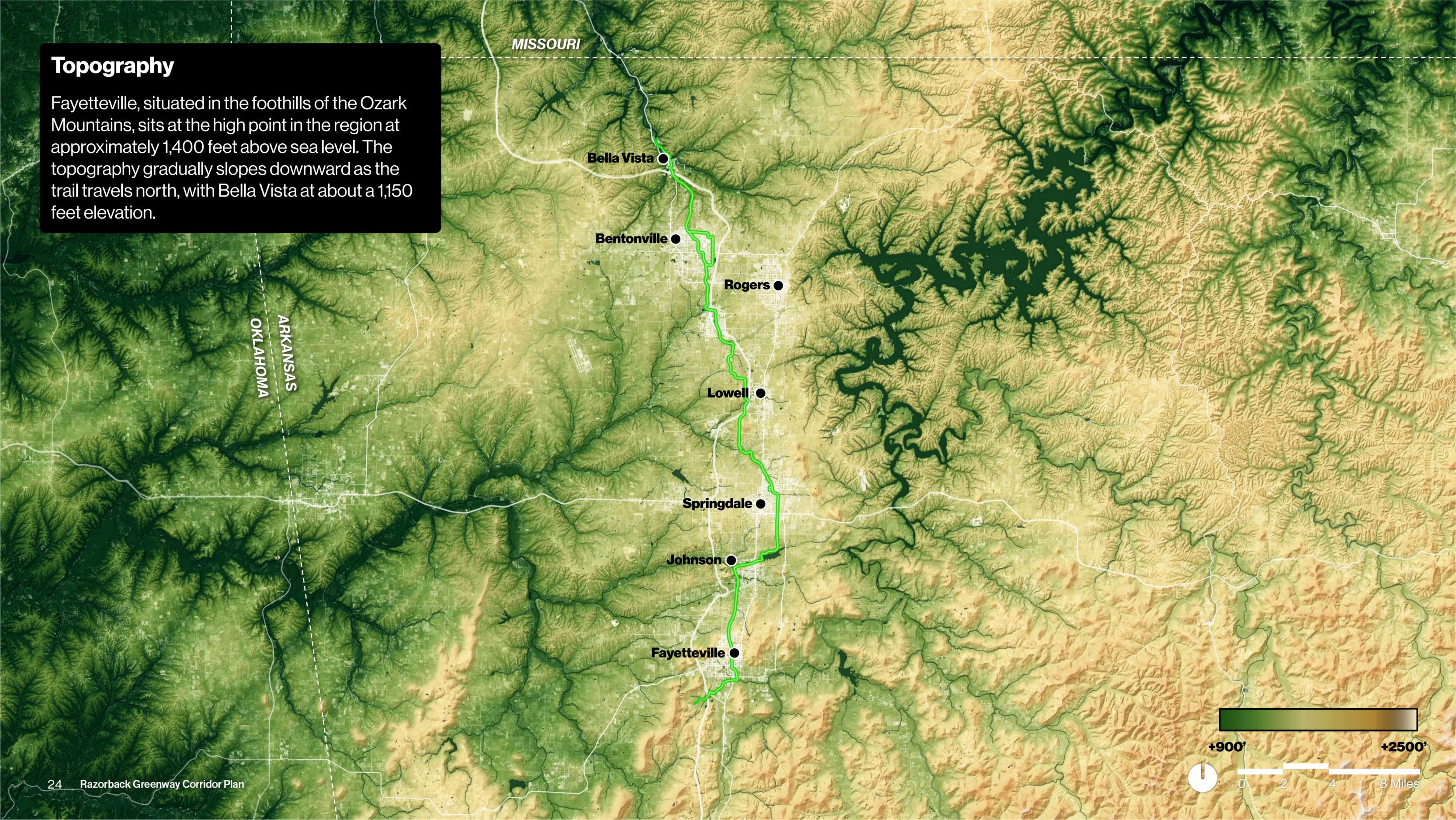
ARKANSAS
OKLAHOMA

Elk
River Hills

Boston
Mountains

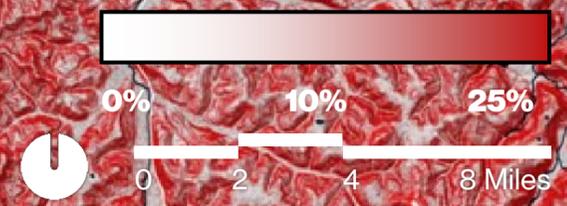
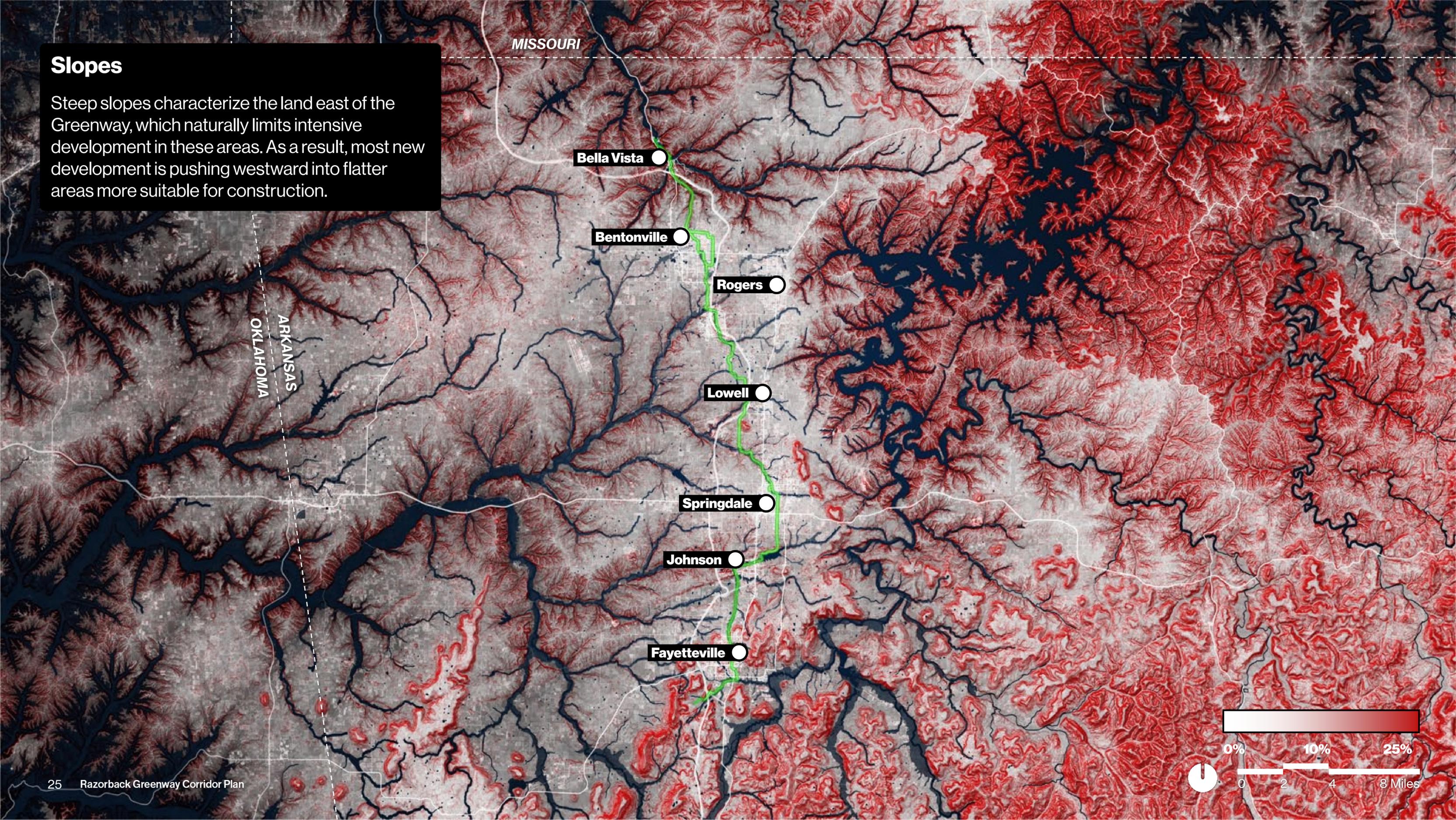


Topography
Fayetteville, situated in the foothills of the Ozark Mountains, sits at the high point in the region at approximately 1,400 feet above sea level. The topography gradually slopes downward as the trail travels north, with Bella Vista at about a 1,150 feet elevation.



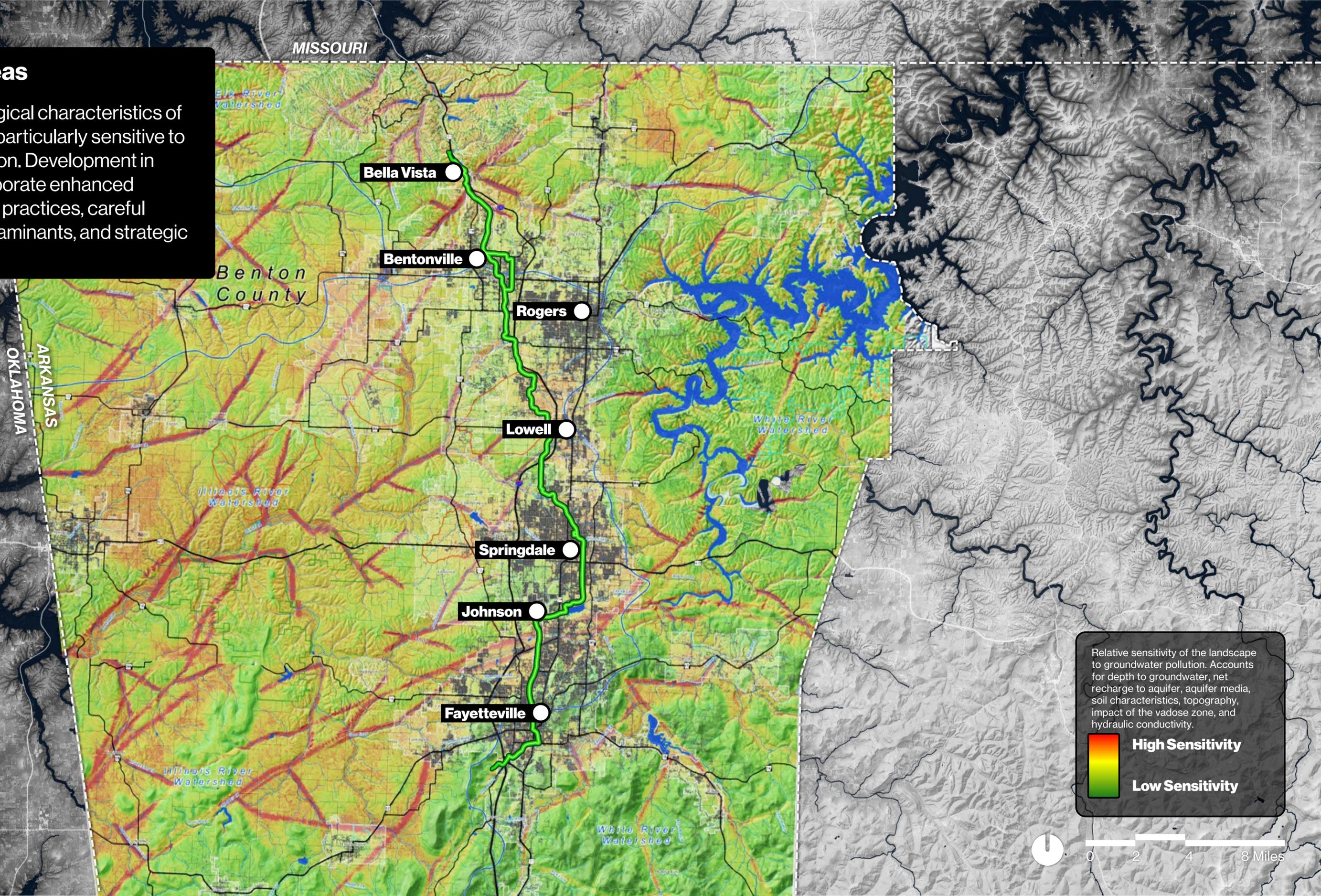
Slopes

Steep slopes characterize the land east of the Greenway, which naturally limits intensive development in these areas. As a result, most new development is pushing westward into flatter areas more suitable for construction.



Karst Sensitive Areas

The physical and hydrological characteristics of karst regions make them particularly sensitive to pollution and contamination. Development in these areas should incorporate enhanced stormwater management practices, careful handling of potential contaminants, and strategic open space preservation.



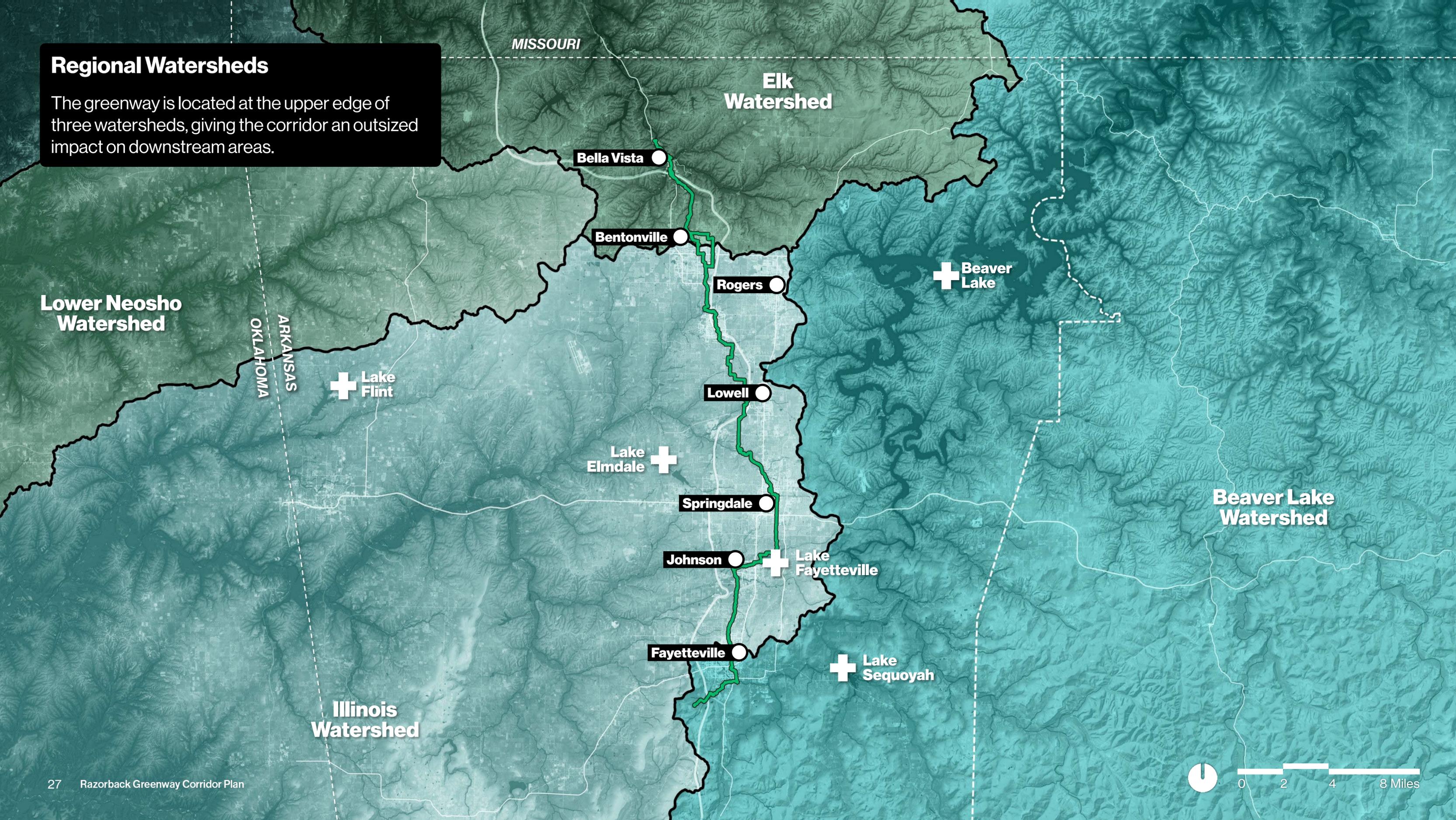
Relative sensitivity of the landscape to groundwater pollution. Accounts for depth to groundwater, net recharge to aquifer, aquifer media, soil characteristics, topography, impact of the vadose zone, and hydraulic conductivity.

High Sensitivity

Low Sensitivity



Regional Watersheds
The greenway is located at the upper edge of three watersheds, giving the corridor an outsized impact on downstream areas.



Lower Neosho Watershed

Elk Watershed

Beaver Lake Watershed

Illinois Watershed



Conservation Opportunities

There is significant opportunity for this plan to acknowledge the EPA-funded CPRG (Carbon Pollution Reduction Grant) projects, the 2016 Open Space Plan, and other conservation initiatives. The Greenway Corridor Plan can define preservation areas and priorities and consider the sustainable management of natural resources alongside development.

MISSOURI
ARKANSAS
OKLAHOMA

MISSOURI

Loch Lamond
Lake Windsor

Pea Ridge National Military Park

Devil's Eyebrow

Beaver Lake Reservoir

Hobbs State Park Conservation Area

Lake Flint

Twin Mountains

Wedington Wildlife Management Area

Kessler Mountain Regional Park

Lake Sequoyah Park

- Priority Open Space (2016)
- Streams
- EPA CPRG Projects
- Regional Parks
- Reservoirs
- Woodlands



Existing Conditions Review

1.4 Mobility & Connectivity

Northwest Arkansas' current mobility is characterized by a predominant north-south flow, with most regional vehicle trips along two to three major highways. Despite basic regional coverage, the current bus network offers limited frequency and reach, underscoring the need for stronger transit connections between the seven cities.

The Razorback Greenway serves as the

spine of the region's bicycle system, while many connections within, from, and to adjacent neighborhoods remain fragmented. The Railyard Loop in Rogers, however, demonstrates the transformative potential of fully connected routes. Addressing gaps in the bicycle network represents an achievable, high-impact improvement for enhancing everyday mobility.

NORTH-SOUTH CONNECTIONS

Most transportation movement happens in the north-south direction, between Fayetteville and Bentonville. Two primary roadways, State Highway 71B and Interstate 49, carry the majority of vehicular traffic, while Highway 112 is being widened and improved to increase future north-south capacity.

MISSOURI
ARKANSAS
OKLAHOMA

Hwy 112 widening

71B BRT alignment under review

- Razorback Greenway
- Major Vehicular Corridors
- Arkansas & Missouri RR
- Other Major Roadways



EXISTING TRANSIT

The existing regional bus network, operated by Ozark Regional Transit and Razorback Transit, is primarily centered on Highway 71B with limited service to other areas. Current bus routes provide basic connectivity between the seven cities but operate with limited frequency and coverage.

MISSOURI
ARKANSAS
OKLAHOMA

MISSOURI

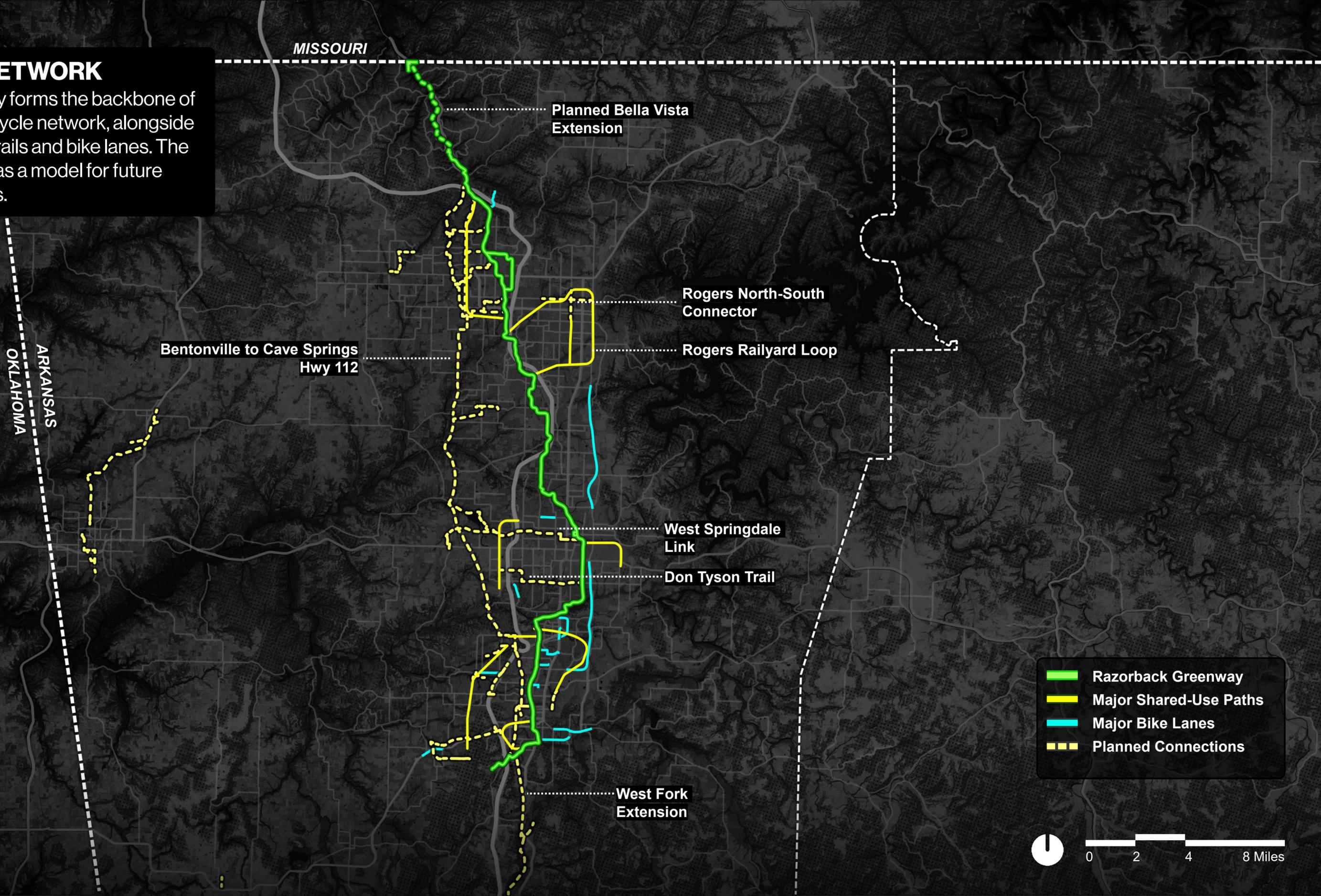
71B

-  Razorback Greenway
-  Major Vehicular Corridors
-  Arkansas & Missouri RR
-  Ozark Regional Transit
-  Other Major Roadways



REGIONAL BIKE NETWORK

The Razorback Greenway forms the backbone of Northwest Arkansas's bicycle network, alongside fragmented shared-use trails and bike lanes. The Railyard Loop, can serve as a model for future connectivity in other cities.



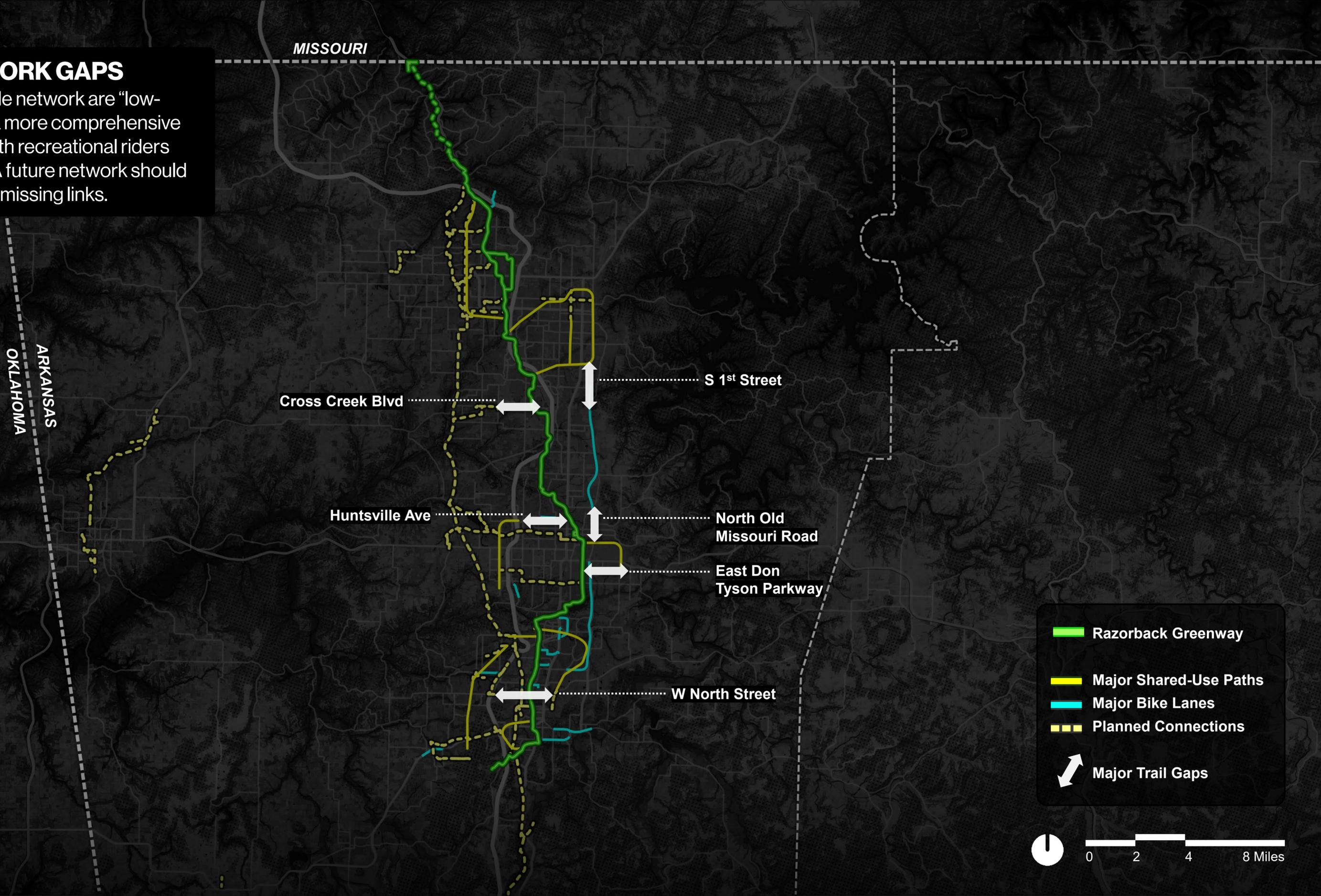
Legend

- Razorback Greenway
- Major Shared-Use Paths
- Major Bike Lanes
- Planned Connections



IMMEDIATE NETWORK GAPS

Gaps in the existing bicycle network are “low-hanging” fruit in creating a more comprehensive and useful network for both recreational riders and bicycle commuters. A future network should include completing these missing links.



Existing Conditions Review

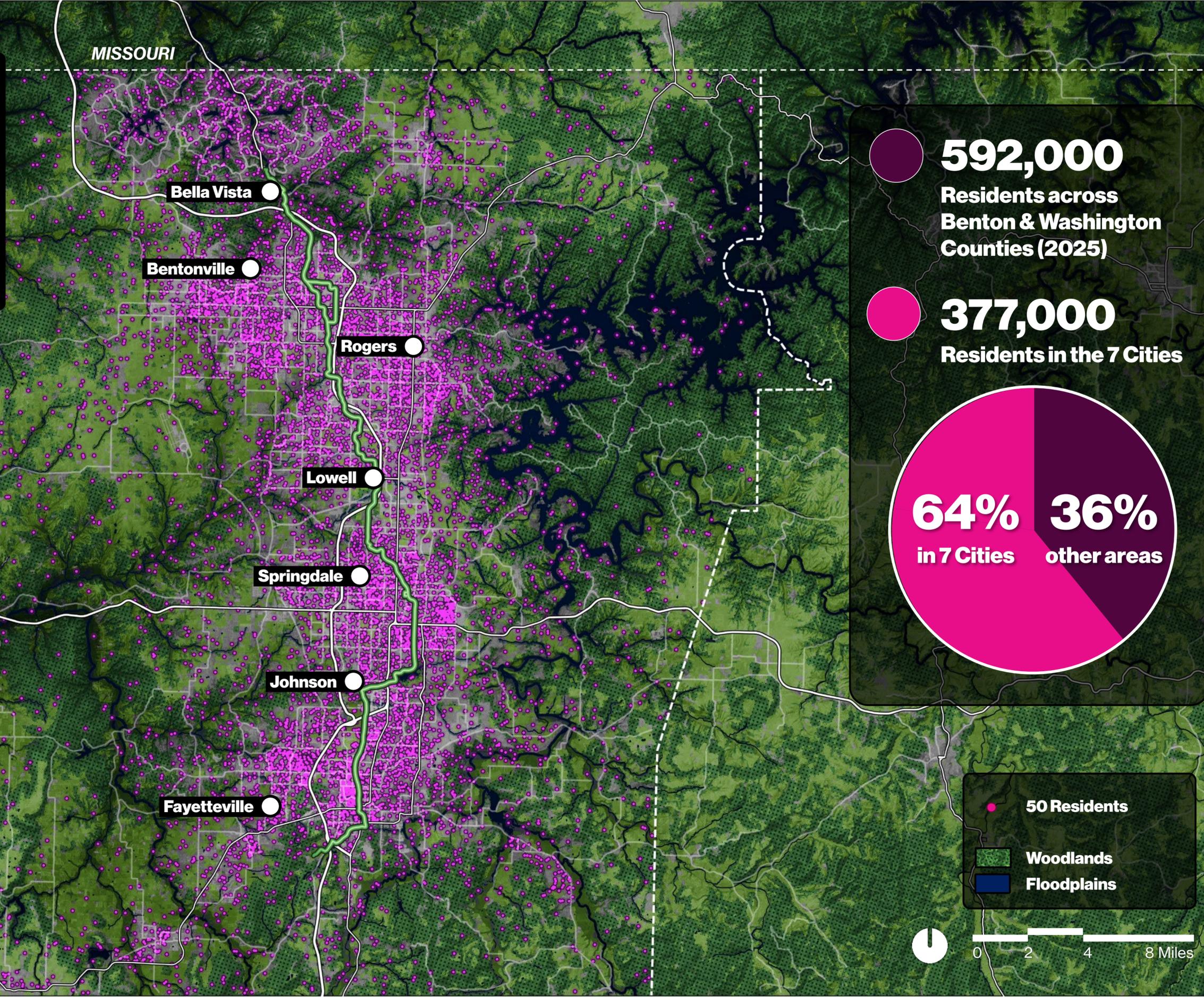
1.5 Housing

Northwest Arkansas is growing rapidly, and the region will need nearly twice as much housing as exists today—yet the land available within the Greenway corridor can only meet this demand if development patterns become more compact and strategic. Most residential parcels along the corridor are small, dispersed, and suited to gentle-density

infill, while commercial parcels are larger, more vacant, and often better positioned for mixed-use or housing conversion. The analysis shows how the Greenway can strategically guide where new homes and services belong to best shape trail-oriented development.

HOUSING DISTRIBUTION

The majority of residents across the two counties live within one of the seven cities. Housing distribution follows historical development patterns, with concentrations in and around the historic cores of each city, along major transportation corridors, and increasingly in suburban areas between municipalities.



EXISTING HOUSING TYPES

The team carefully studied existing building types and how they relate to relevant code contexts across each of the seven municipalities.

ADU



Density: 6-10 units per acre
 Typical Height: 1-2 Stories
 Parking: Rear Garage

Single Family



Density: 6-10 units per acre
 Typical Height: 2-3 Stories
 Parking: Rear Garage

Duplex



Density: 8-12 units per acre
 Typical Height: 2-3 Stories
 Parking: Rear Garage/On-Street

Townhouse



Density: 16-40 units per acre
 Typical Height: 2-3 Stories
 Parking: Rear Garage/On-Street

Small-Scale Multi-Family



Density: 25-70 units per acre
 Typical Height: 2-3 Stories
 Parking: Rear Garage

Mid-Scale Multi-Family

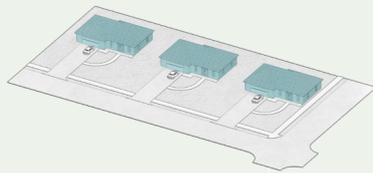


Density: 28-80 units per acre
 Typical Height: 2-3 Stories
 Parking: Rear Surface/On-Street

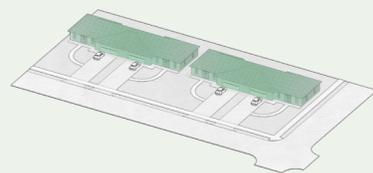
Large-Scale Multi-Family



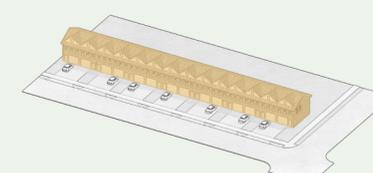
Density: 50-90 units per acre
 Typical Height: 4+ Stories
 Parking: Parking Garage



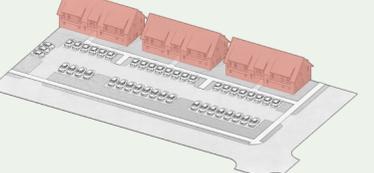
Density: 2-4 units per acre
 Typical Height: 1-2 Stories
 Parking: Rear Garage



Density: 6-10 units per acre
 Typical Height: 1-2 Stories
 Parking: Front Garage



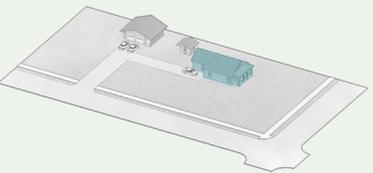
Density: 12-24 units per acre
 Typical Height: 1-2 Stories
 Parking: Front & Rear Garage



Density: 16-30 units per acre
 Typical Height: 1-2 Stories
 Parking: Front Surface Lot



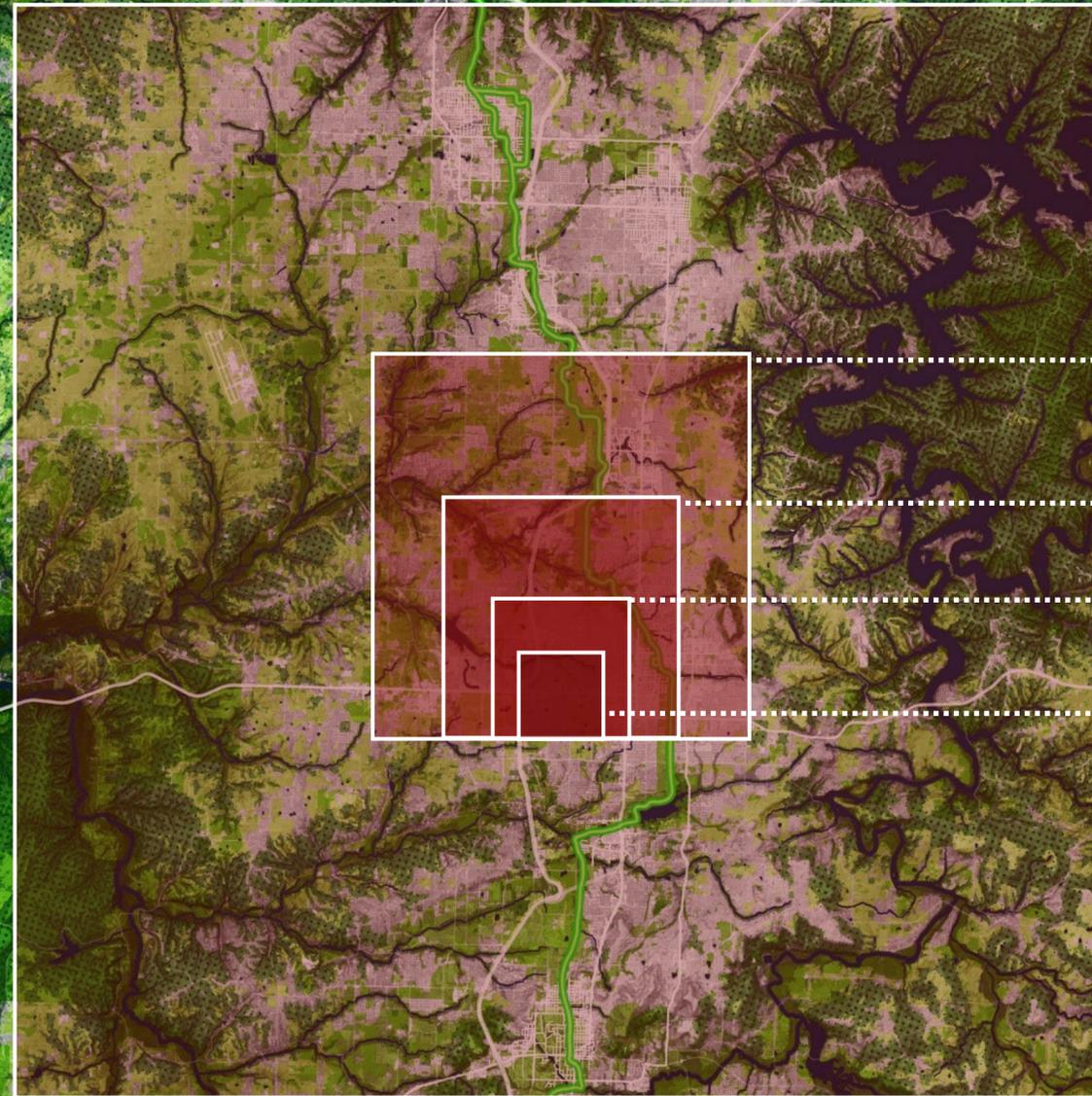
Density: 20-40 units per acre
 Typical Height: 2-3 Stories
 Parking: Surface Lot



Density: 0-0.5 units per acre
 Typical Height: 1-2 Stories
 Parking: Front Garage/Surface

WHAT DOES 400,000 MORE PEOPLE LOOK LIKE?

NWA needs almost twice as much housing as it already has. There is not enough space if we build in a suburban format. If we build in more compact forms, we can put the housing where we need it and where it best leverages the Greenway. The graphic to the right shows an approximate “footprint” of 400,000 people at different densities.



Rural Single Family
2.5 ppl / acre

Suburban Single Family
10 ppl / acre

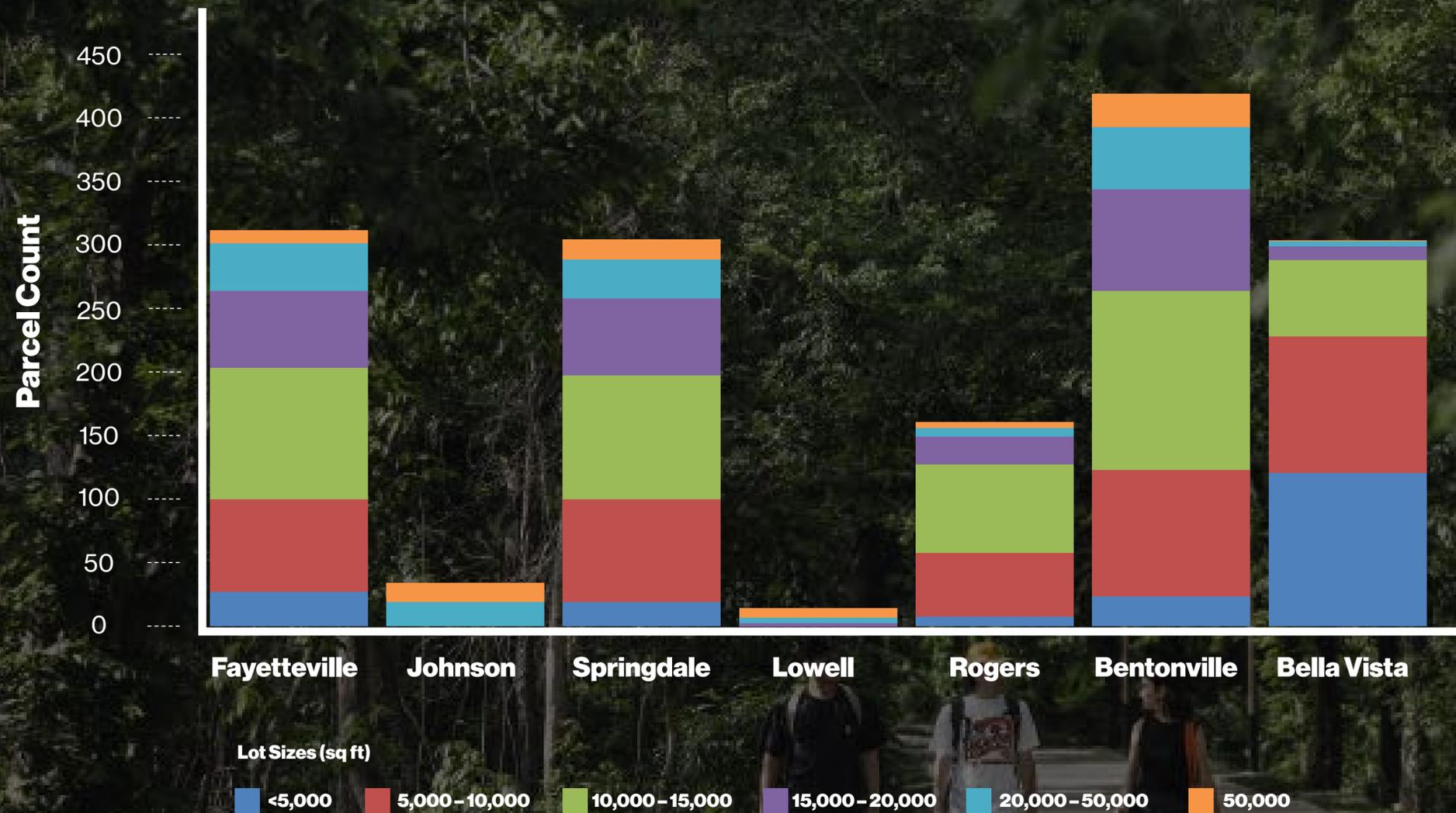
Urban Single Family
25 ppl / acre

Suburban Small-Scale Multi-Family
75 ppl / acre

Urban Small-Scale Multi-Family
175 ppl / acre

RESIDENTIAL VACANT PARCELS WITHIN ½ MILE OF GREENWAY

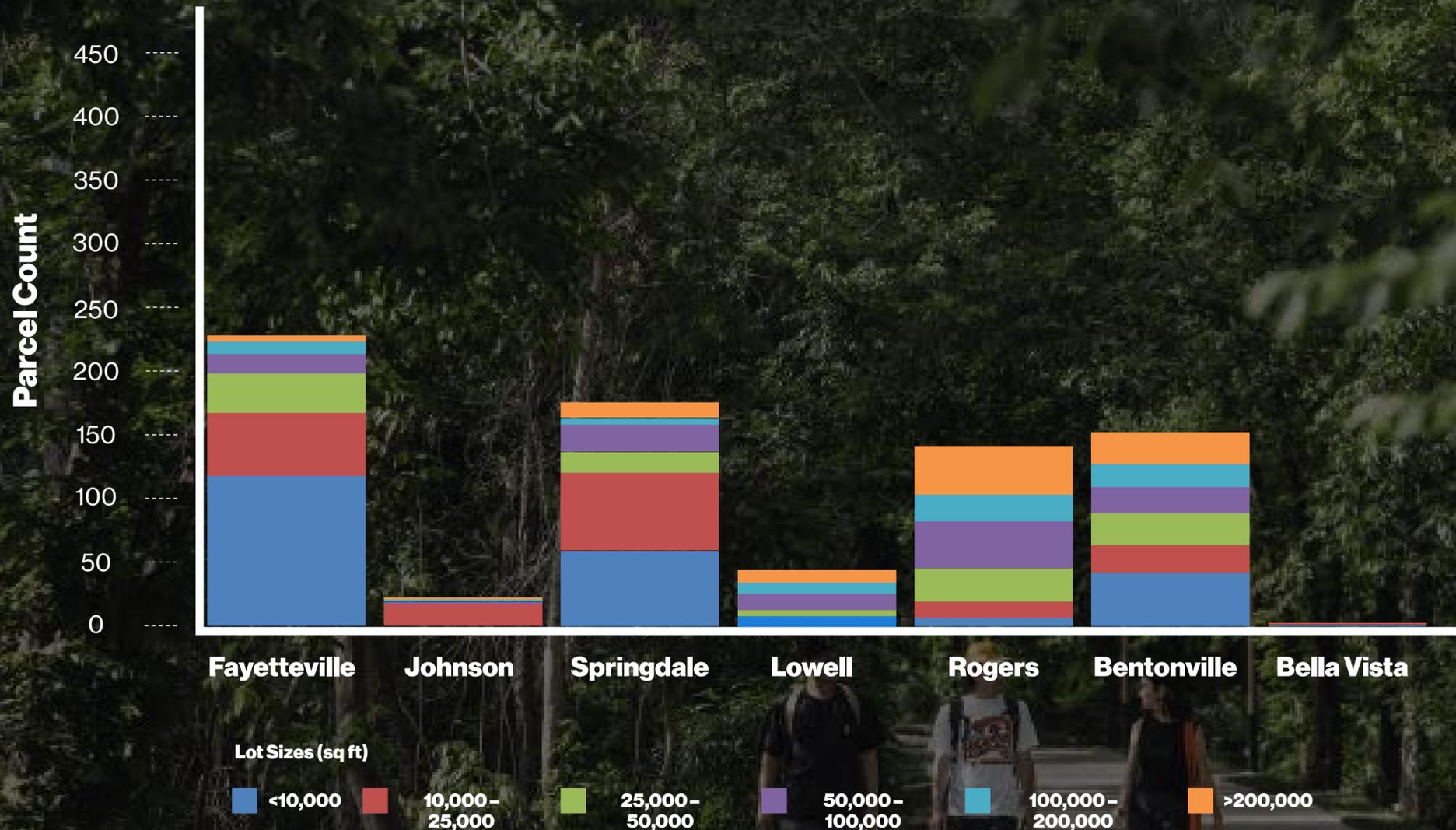
Across nearly every town, most residential parcels are 5,000–15,000 sq ft. This size range is ideal for infill with detached homes, duplexes, and small multi-unit buildings without requiring lot consolidation. This scale of development is achievable for local builders, supports affordability, fits neighborhood context, and aligns with recent zoning reforms enabling middle housing. Housing growth will come from hundreds of small wins by activating these scattered lots.



Source: City parcel data

COMMERCIAL VACANT PARCELS WITHIN ½ MILE OF GREENWAY

The Greenway has too much single-use commercial zoning. 25-50% of commercial land is vacant within the corridor. Most vacant commercial parcels across the towns are under 100,000 sq ft, with non-vacant parcels typically between 10,000 and 70,000 sq ft. These sites are well suited for horizontal mixed-use, small multifamily, or mixed-use conversions, especially where they have both street access and trail visibility. Larger parcels over 200,000 sq ft offer long-term opportunities for master-planned, district-scale development.



Source: City parcel data

Existing Conditions Review

1.6 Key Places & Economic Drivers

The Razorback Greenway's success can serve as a blueprint for channeling regional economic growth in a way that strengthens communities across Northwest Arkansas. As jobs and population continue to outpace state and national trends, understanding where growth is occurring and where it should be guided.

Major employment hubs such as downtown Bentonville, the Rogers commercial district, downtown Springdale, and the University of Arkansas already

anchor the region, offering insights into existing centers of energy and future areas of investment.

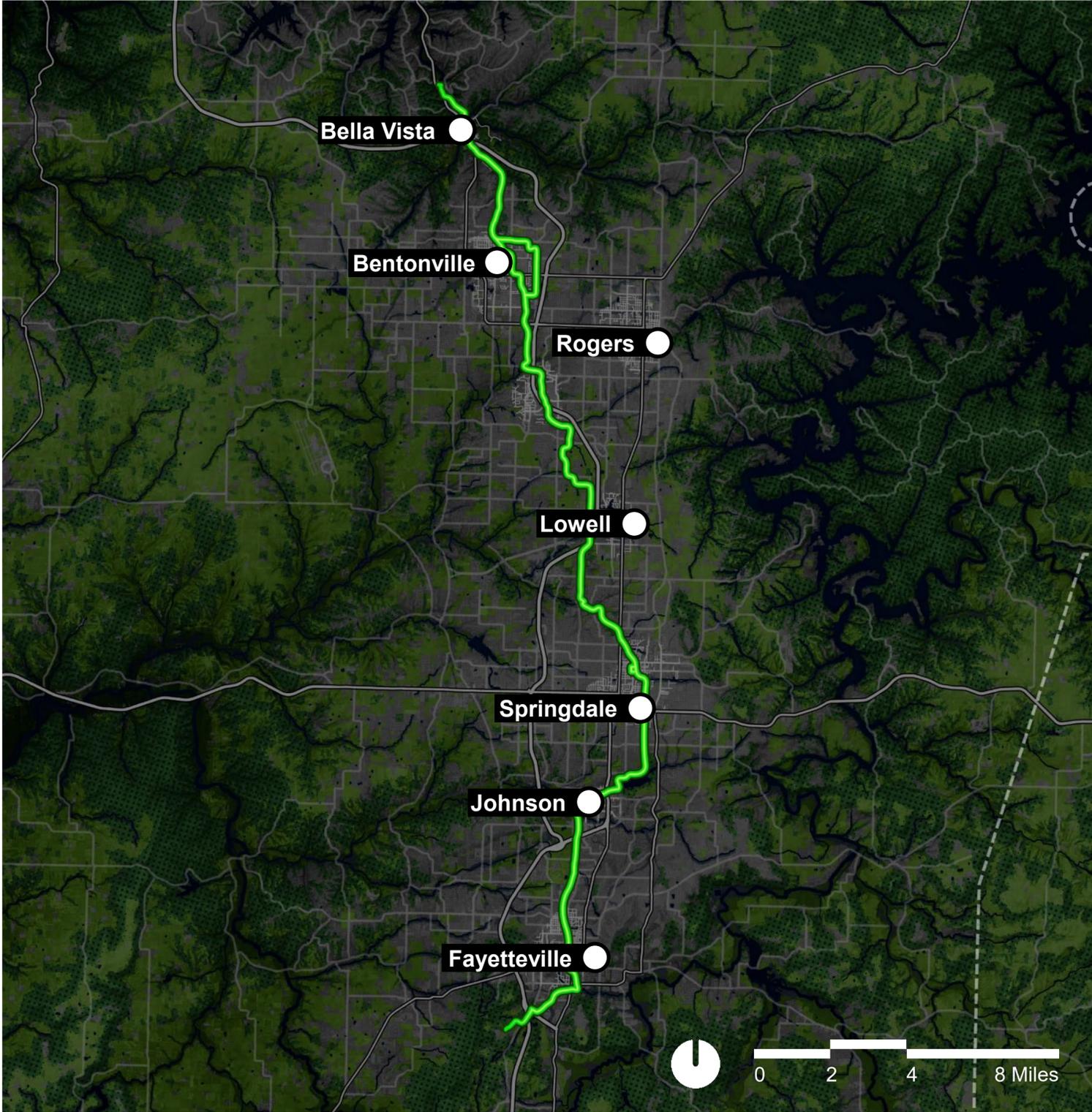
By examining industry trends, cost-of-living pressures, demographic change, and patterns of place-based development, this section begins to analyze where and how growth can best support local needs.

ECONOMIC GROWTH IN NORTHWEST ARKANSAS

The Razorback Greenway's success provides a framework for future regional economic growth. This framework also offers an opportunity both to build on historic momentum and guide smart growth that aligns with the goals and needs of Northwest Arkansas communities.

This section examines trends in economic growth and development in Washington and Benton Counties and in the seven cities along the Greenway, including the following:

- **Industry and Employment:** patterns in job and business growth across industries
- **Income and Cost of Living:** household and individual earnings and relationship with cost of living and living wages
- **Demographic Trends:** patterns in race/ethnicity, age, household composition, educational attainment, and other factors and the associated needs of residents
- **Place Investment:** trends in real estate development, downtown vitality, and investment in public and cultural amenities
- **Future Corridor Growth:** synthesizes data and trends for each of the Greenway cities into opportunities and challenges for future development.



Existing Job Centers

Major employment nodes include downtown Bentonville (Walmart headquarters), the Rogers commercial district, downtown Springdale, the University of Arkansas, and various industrial and office parks near major highways.

MISSOURI
OKLAHOMA
ARKANSAS

Walmart Home Office

Northwest Medical Center

Downtown Springdale

Downtown Rogers

J.B. Hunt Transport

Tyson Foods

Washington Regional Medical Center

Downtown Fayetteville / University of Arkansas

- 50 Jobs
- Agriculture
- Woodlands
- Floodplains



INDUSTRY AND EMPLOYMENT GROWTH

NWA jobs and population have grown in tandem over the past decade, far outpacing statewide and national growth. While new jobs in sectors such as construction are growth-dependent, sectors such as healthcare, finance, wholesale, and arts/entertainment represent primary drivers of economic growth.

Employment Growth
(2013-22)

NWA **+33%** > AR **+7%**
USA **+12%**

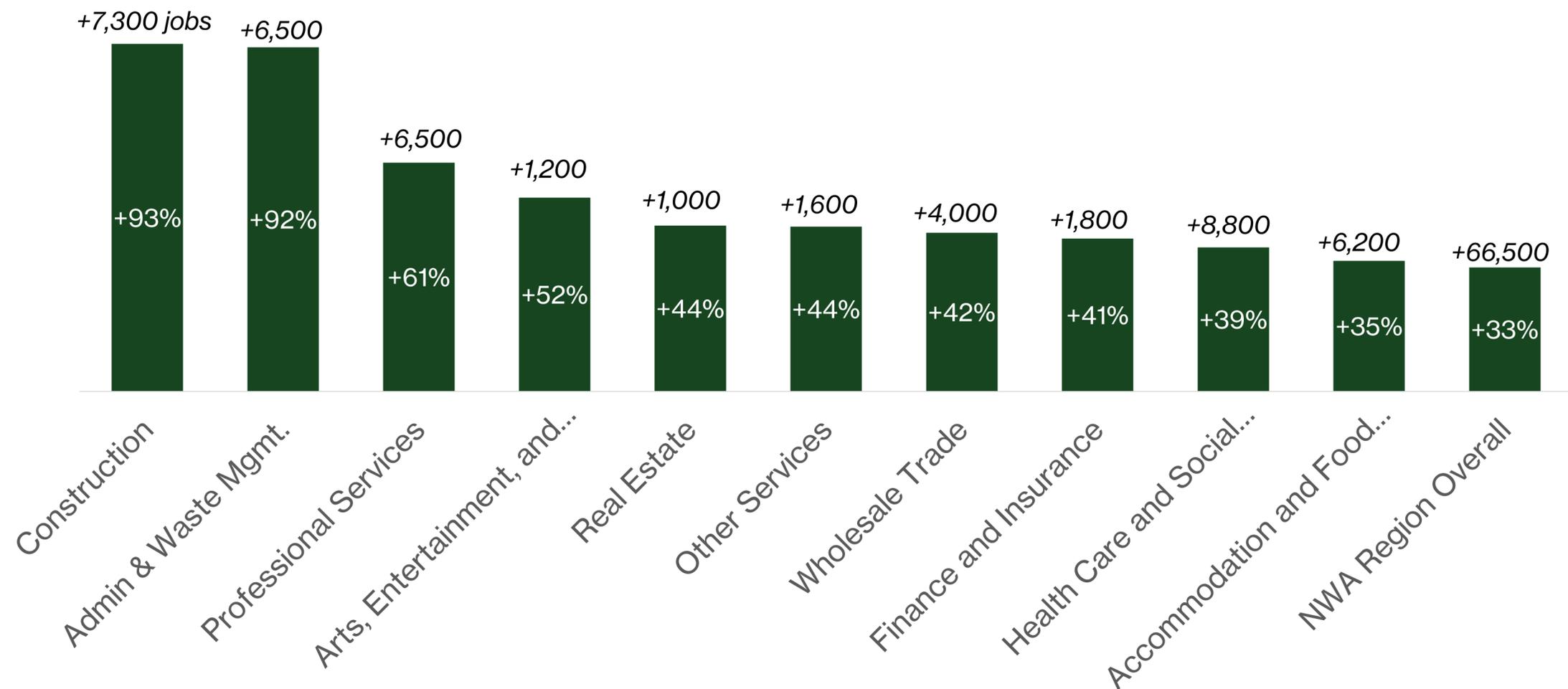
Population Growth
(2013-22)

NWA **+23%** > AR **+3%**
USA **+6%**

Growth in No. of Employer Establishments
(2013-22)

NWA **+32%** > AR **+8%**
USA **+11%**

Job Growth in Sectors Exceeding NWA Regional Average (2013-22)

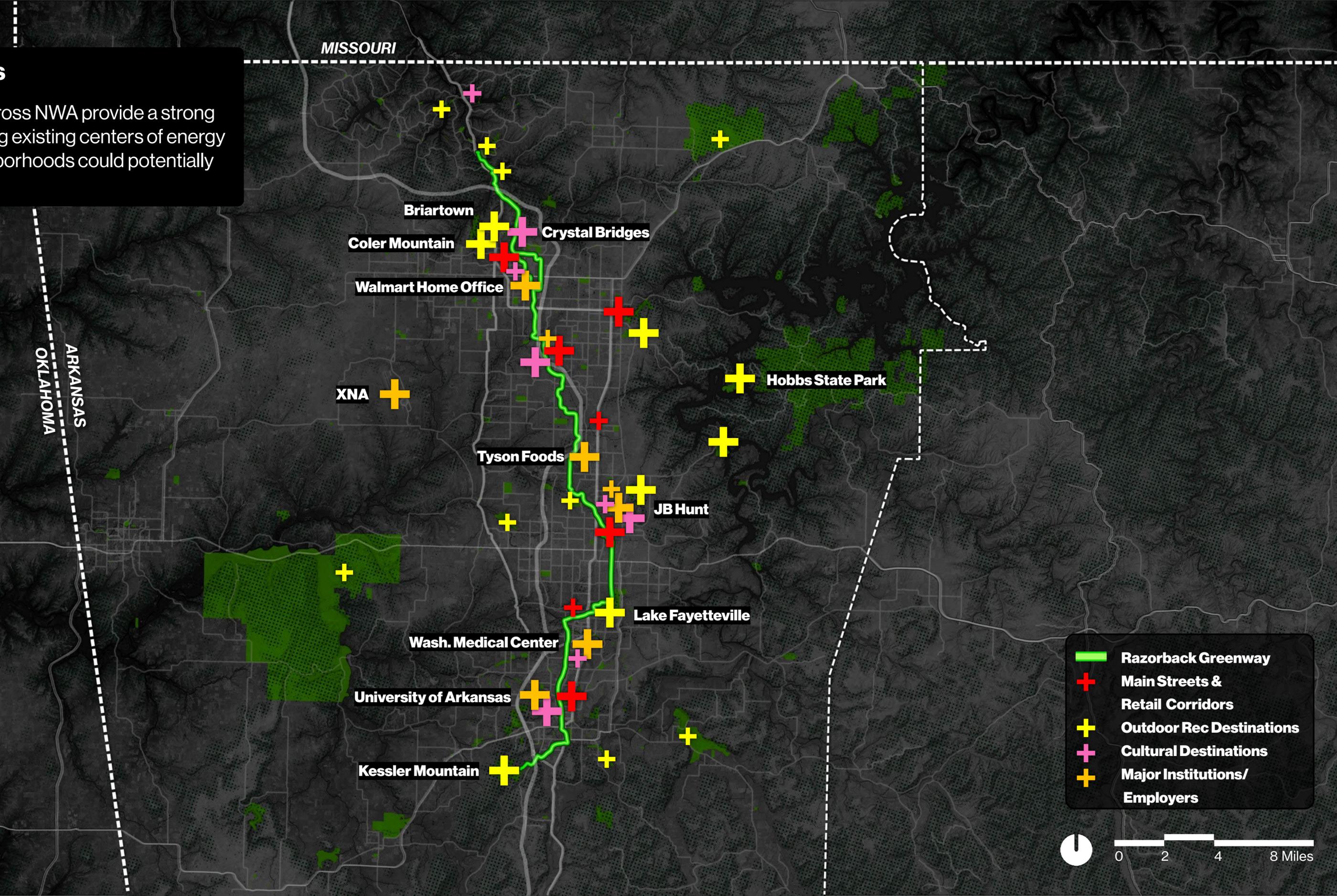


Sources: U.S. Census Bureau; including Longitudinal Employer-Household Dynamics (LEHD) and County Business Patterns.

Northwest Arkansas is defined as Benton and Washington Counties.

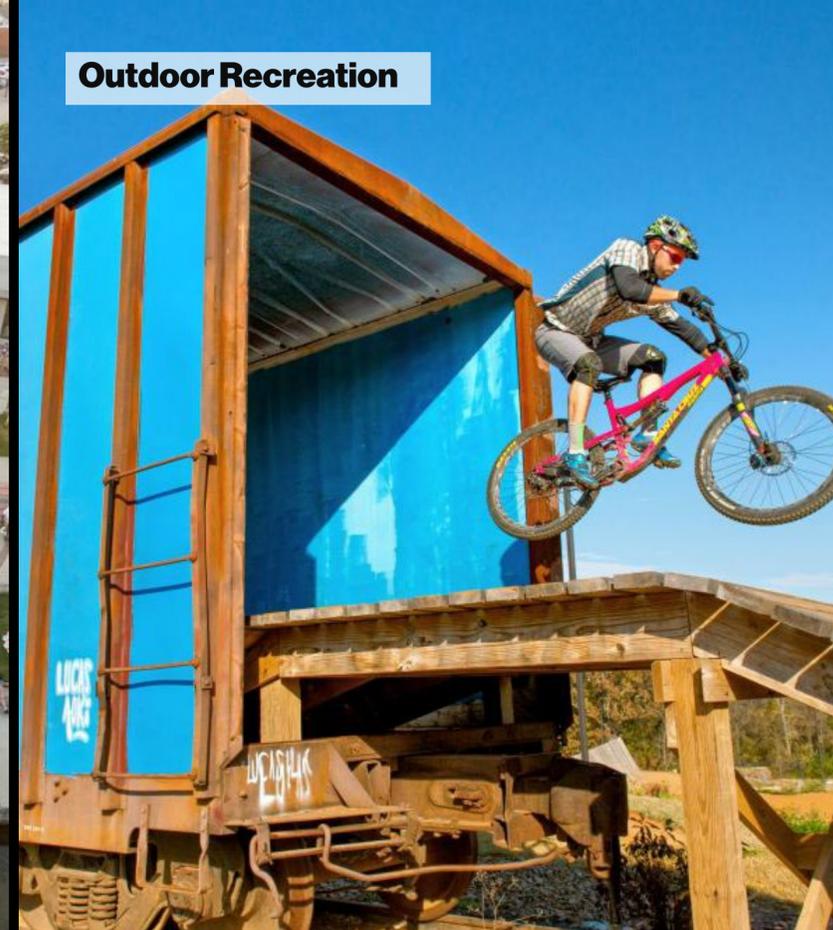
Key Destinations

Major destinations across NWA provide a strong foundation for studying existing centers of energy and where new neighborhoods could potentially be focused.



- Razorback Greenway
- Main Streets & Retail Corridors
- Outdoor Rec Destinations
- Cultural Destinations
- Major Institutions/Employers





Regional Destinations

PLACE INVESTMENT – Commercial Real Estate Development

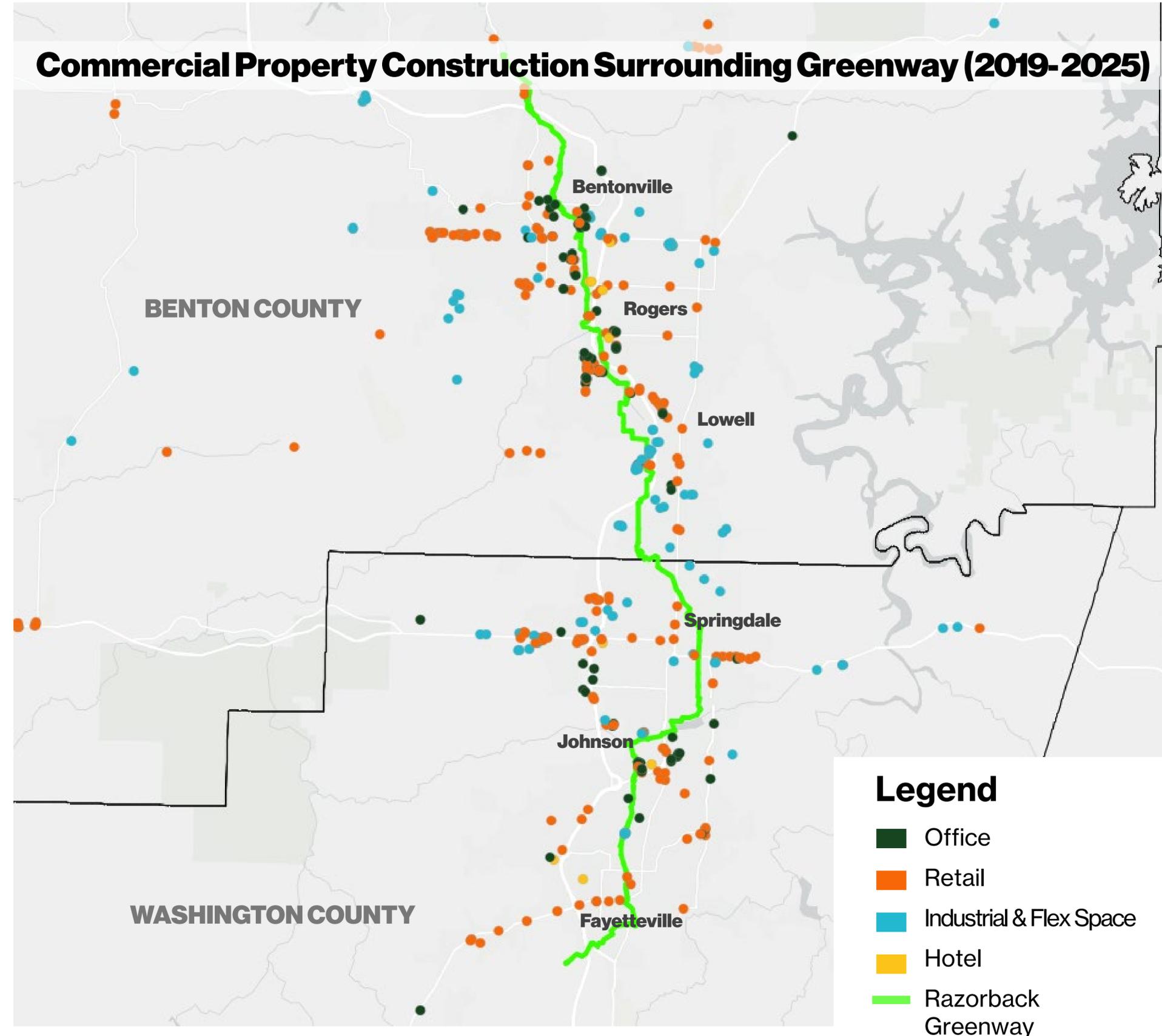
Northwest Arkansas has benefitted significantly from place-based investment, including robust commercial real estate development.

Net Growth of Northwest Arkansas Commercial Property Inventory (2019-2024)

| | |
|-------------------|-----------------------------|
| Office | +9% (+2.1M SF) |
| Retail | +5% (+1.7M SF) |
| Industrial & Flex | +9% (+4.1M SF) |
| Hotel | +11% (+800 rooms) |

Source: Costar
Northwest Arkansas is defined as Benton and Washington Counties.

Commercial Property Construction Surrounding Greenway (2019-2025)



Legend

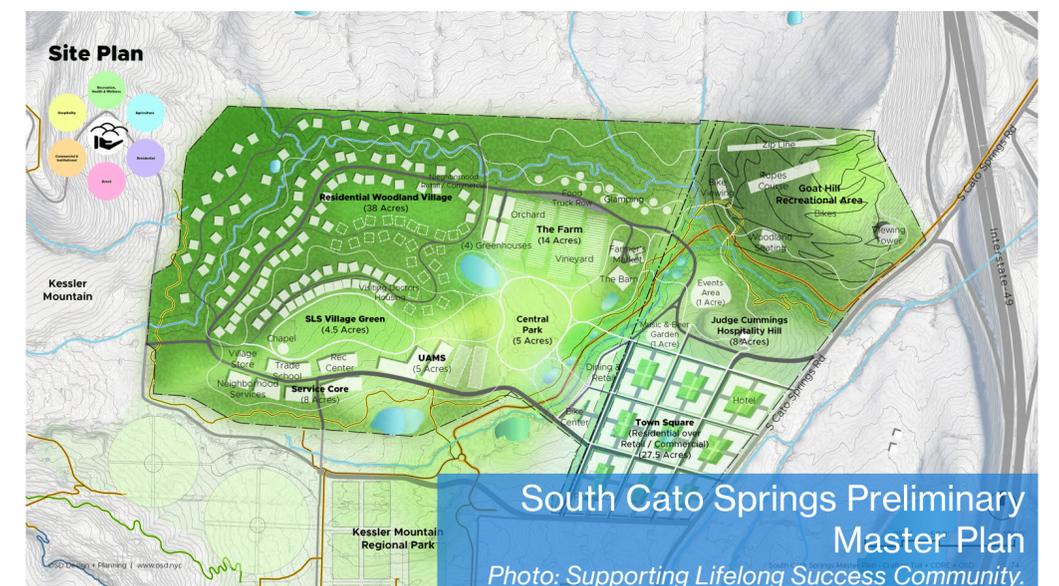
- Office
- Retail
- Industrial & Flex Space
- Hotel
- Razorback Greenway

PLACE INVESTMENT – COMMERCIAL REAL ESTATE DEVELOPMENT

Major commercial real estate development projects are taking place across the region, including Walmart's new home office, a cluster of mixed-use development projects along Pinnacle Hills Parkway in Rogers, and a proposed master-planned district in Fayetteville that will include residential and commercial development and a University of Arkansas outpatient genomics clinic.

Examples of Major Ongoing and Upcoming Commercial Real Estate Projects

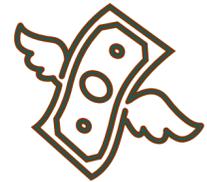
| Name | City | Land Use | Size | Expected Completion Year |
|-------------------------------|--------------|-----------|--|--------------------------|
| New Walmart Home Office | Bentonville | Office | 2.4M SF | 2025 |
| 5100 SW Regional Airport Blvd | Bentonville | Warehouse | 200K SF | 2025 |
| 1270 Kendrick Ave | Springdale | Warehouse | 111K SF | 2025 |
| The Visionary | Rogers | Office | 194K SF | 2026 |
| Pinnacle Heights | Rogers | Mixed Use | 296 apartments 26K SF retail 288 hotel rooms | 2027 |
| South Cato Springs | Fayetteville | Mixed Use | 230 acres | TBD* |



Sources: Forbes, CoStar, Talk Business and Politics, Supporting Lifelong Success Community, Crafton Tull. *Site infrastructure at South Cato Springs is under construction; development is expected to take place over 15-20

PLACE INVESTMENT – TOURISM AND VISITATION

A robust and growing tourism industry has also contributed to Northwest Arkansas's boom. Leisure travelers are attracted by outdoor recreation as well as arts and culture destinations.



**Growth in NWA
Visitor Spending
(2019-23)**

+26%

(+\$410M; compare
to 24% statewide)



**Growth in XNA
Passenger Vol.
(2019-24)**

+26%

(compare to +6%
at LIT - Little
Rock, +5%
nationally)



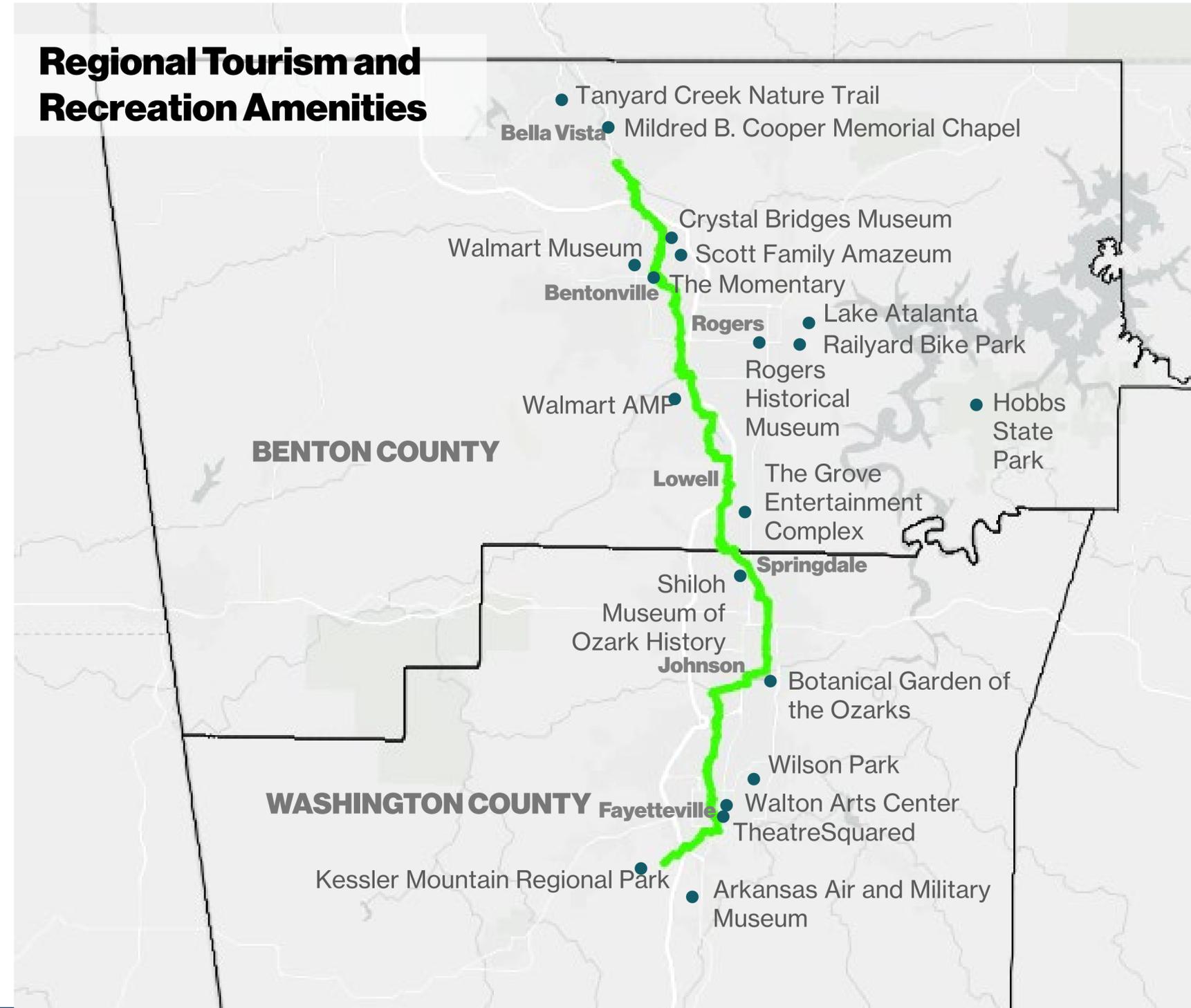
**Growth in NWA
Hotel Revenues
(2019-24)**

+38%

(compare to +31%
statewide)

Sources: Arkansas.com interactive Economic Impact of Tourism reports accessed March 24, 2025; Bureau of Transportation Statistics; CoStar.

Regional Tourism and Recreation Amenities



PLACE INVESTMENT – COMMERCIAL ACTIVITY

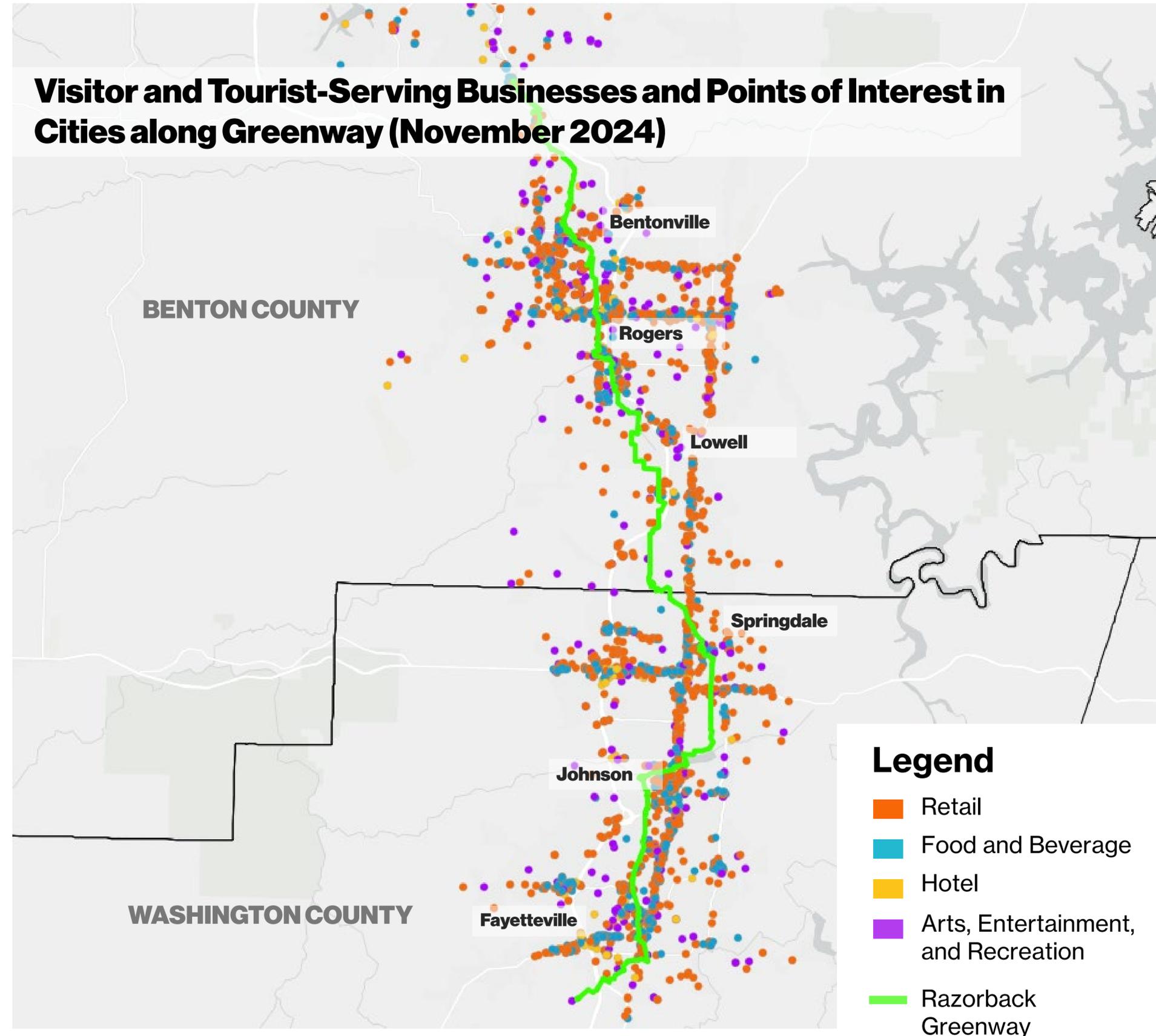
Cities along the Greenway have an impressive density of businesses that serve residents, workers, and visitors.

Number of Businesses in Cities along Greenway by Type (November 2024)

| | |
|-------------------------------------|--------------|
| Retail | 1,950 |
| Food and Beverage | 1,050 |
| Hotel | 150 |
| Arts, Entertainment, and Recreation | 300 |

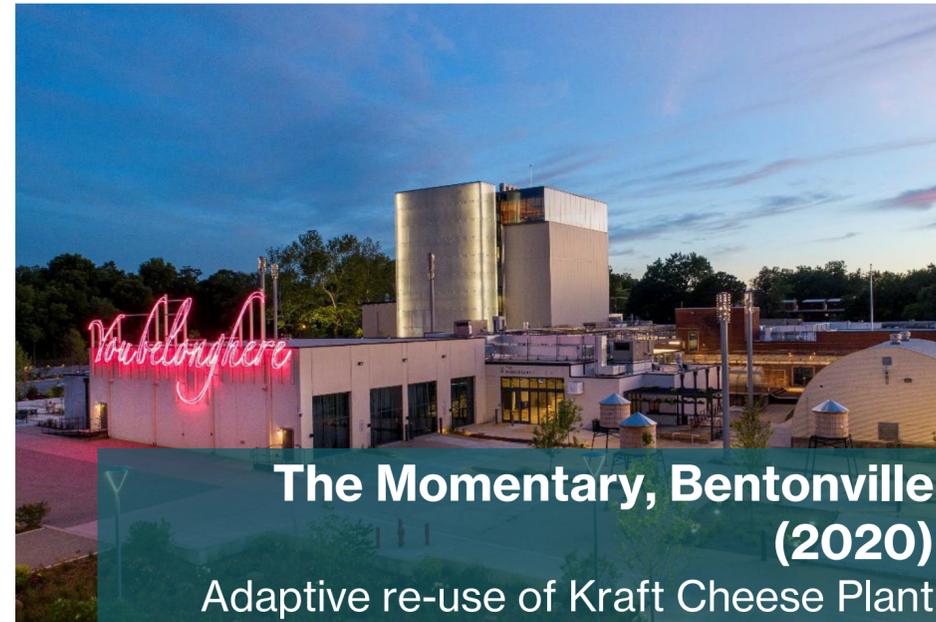
Source: DataAxle via Esri Business Analyst. Data last updated November 2024; number of businesses rounded to the nearest fifty.

Visitor and Tourist-Serving Businesses and Points of Interest in Cities along Greenway (November 2024)



PLACE INVESTMENT – DOWNTOWN INVESTMENT

Recent economic growth has spurred downtown investments across the region that support cultural, civic, and community activity.



Sources, clockwise from top left: Architect Magazine, Talk Business & Politics, Rogers Historical Museum, ABC5 News, Architectural Record, Northwest Arkansas Democrat Gazette.
Image sources, clockwise from top left: Walton Family Foundation, Visit Bentonville, Walton Family Foundation, Timothy Hursley via Architectural Record, Walton Family Foundation.

TAKEAWAYS FOR A REGIONAL FRAMEWORK

Northwest Arkansas has enjoyed rapid population and economic growth, thanks to its relative affordability, natural beauty, outdoor recreation, and other aspects of high quality of life. Preserving those advantages will require a deliberate strategy that includes centering new residential and infrastructure development near growing job centers.

- NWA has experienced rapid growth, with jobs (+33%) outpacing population increases (+23%) from 2013 to 2022.
- Wages have risen, but many workers – especially in fast-growing sectors like Administrative Support and Arts, Entertainment, and Recreation – still cannot afford the region’s cost of living.
- Although 73% of regional jobs are located in Greenway cities, only 51% of workers can afford to live there, pushing many to outlying areas.
- Employment in the NWA Workforce Development Area is projected to grow another 10% by 2032, driven by major investments such as the new Walmart Home Office and hospital expansions.
- Without targeted interventions, many future workers may be priced out of the region.
- To maintain affordability, livability, and access to open space, Greenway communities should prioritize new housing and infrastructure near growing job centers.



Existing Conditions Review

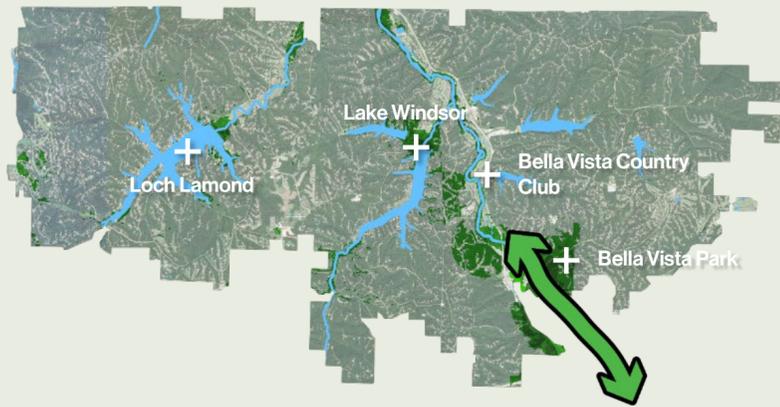
1.7 The Seven Cities

Each Greenway city is evolving in different ways based on its job base, amenities, and development pressures. Employment has surged across the corridor, from Bentonville's corporate expansion to Rogers' healthcare-driven growth and Lowell's logistics hub. Meanwhile, incomes, job access, and housing stability vary widely from city to city. These trends shape who benefits from growth today and who is at risk of being priced out, especially in places where wages fall behind the rising cost of living.

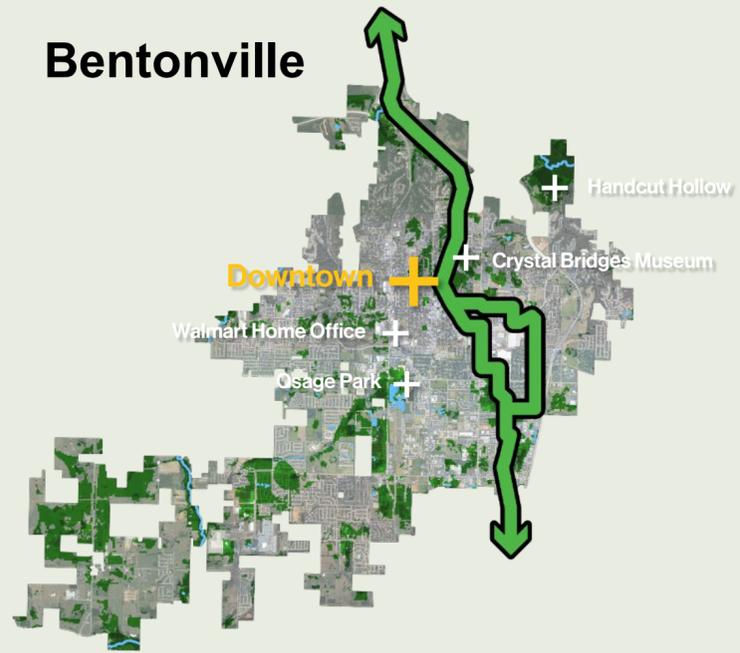
The Greenway offers a potential unifying framework to guide future investment by connecting major job centers, cultural destinations, parks, and emerging development sites.

This analysis outlines these, highlighting the opportunities and challenges that will shape how the corridor grows and whom it can serve.

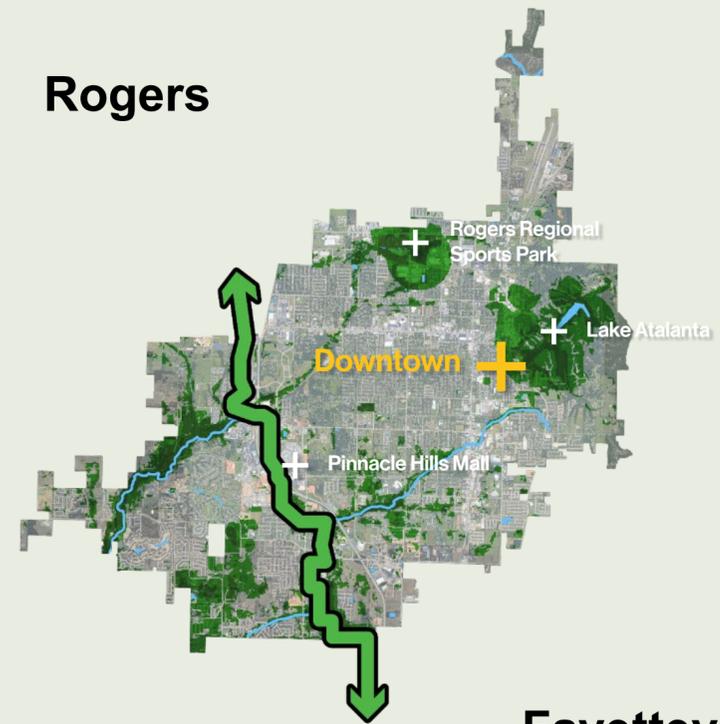
Bella Vista



Bentonville



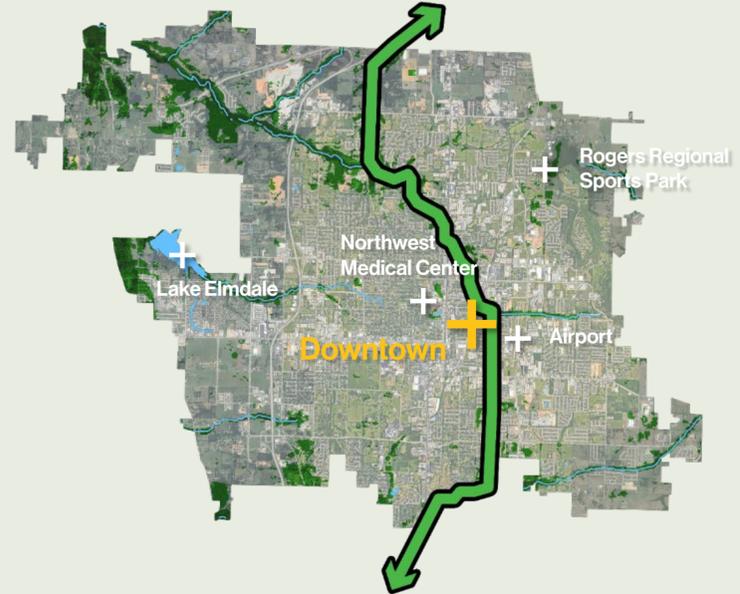
Rogers



Lowell



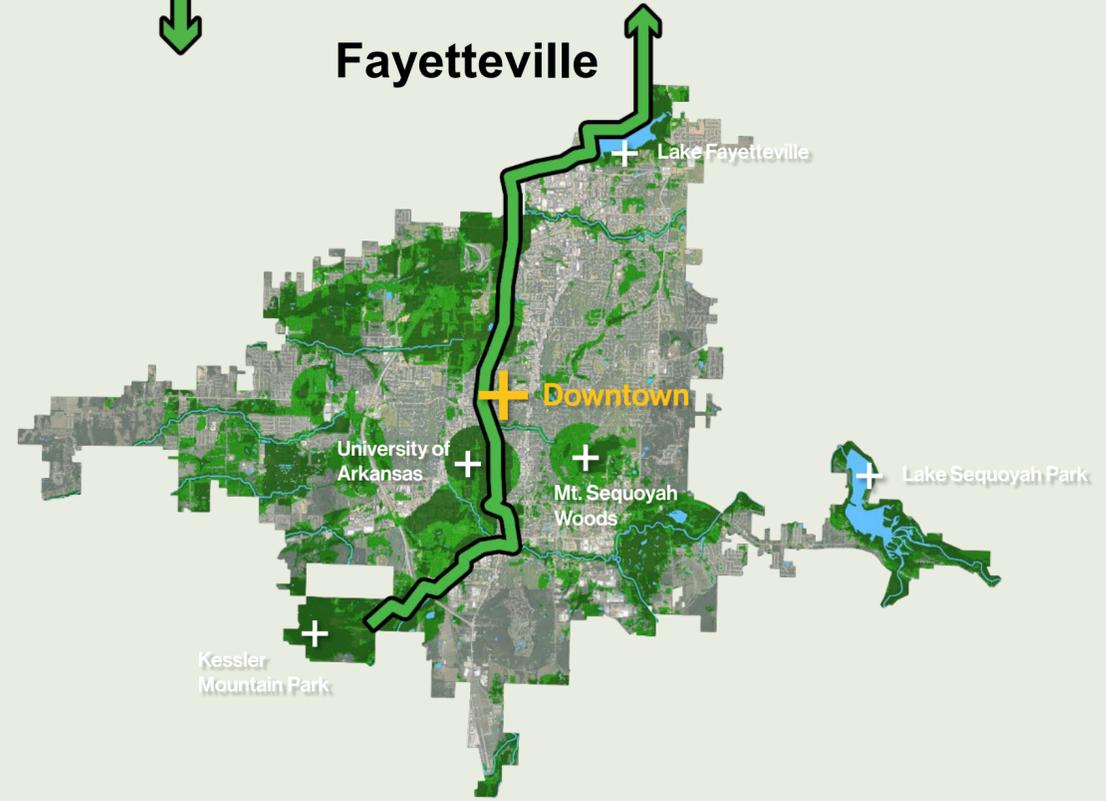
Springdale



Johnson



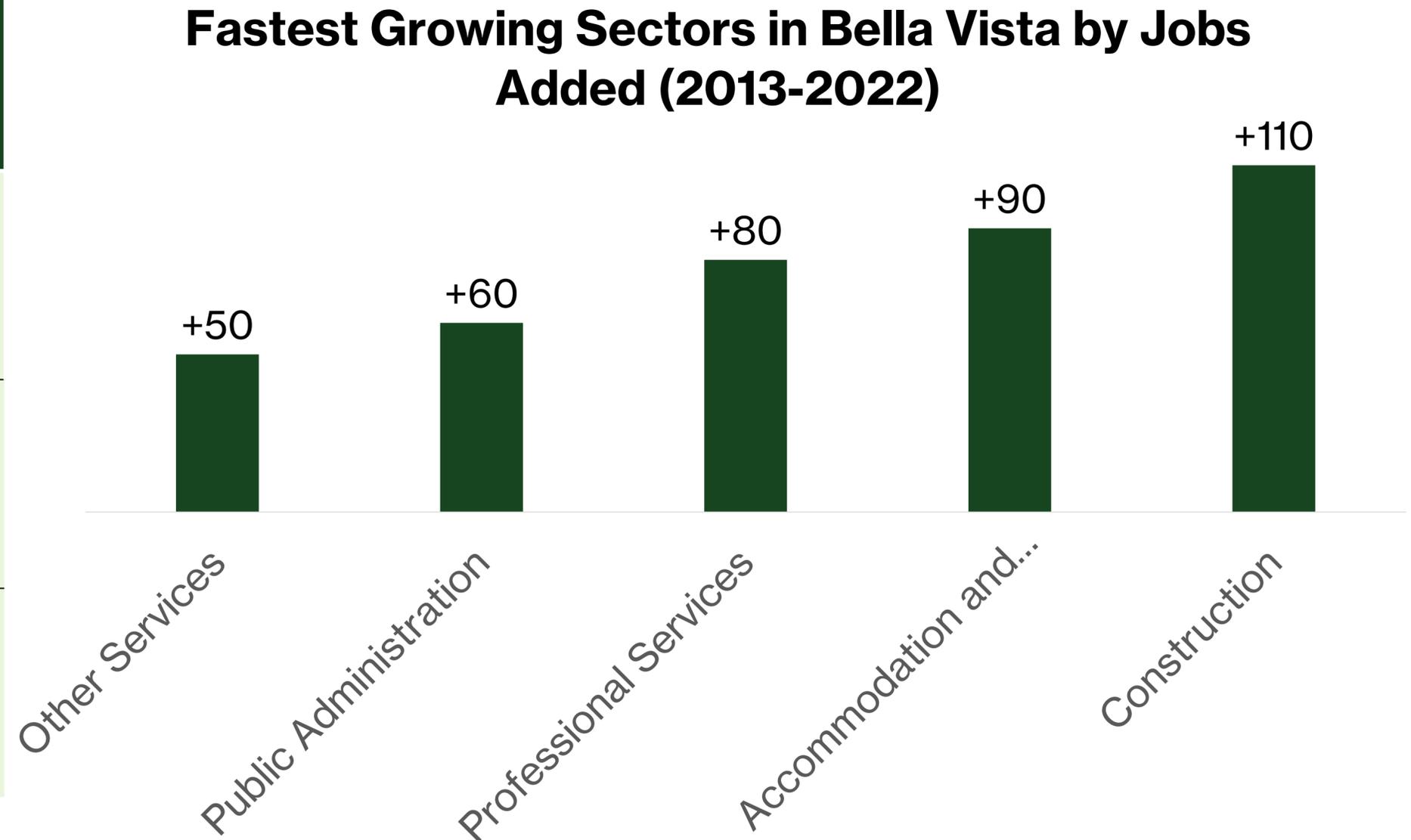
Fayetteville



INDUSTRY AND EMPLOYMENT GROWTH – BELLA VISTA

Bella Vista’s status as a primarily residential bedroom community means that it has a small share of jobs and modest employment growth compared to neighboring cities along the Greenway.

| Employment in Bella Vista | |
|---------------------------|-----------------------------------|
| Total Jobs in City (2022) | 2,513 |
| Job Growth (2013-22) | +15% <i>(+330 jobs)</i> |
| Unemployment Rate (2023) | 3.1% |



Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD); Arkansas Division of Workforce Services, Labor Market Information Section, Employment and Unemployment Statistics – LAUS.

FUTURE CORRIDOR GROWTH – BELLA VISTA

Future investment along the Greenway Corridor should enable preservation of regional green spaces by focusing growth strategically. Bella Vista is a primarily residential bedroom community with a relatively high-income population that benefits from high quality of life and access to natural and recreation amenities.

Opportunities

- **A hub for tourism and recreation.** The city is home to 100+ miles of trails, including the first chairlift-served mountain biking park in NWA. Bella Vista's natural and recreation amenities offer quality of life and attract tourists.
- **Significant pipeline development on the horizon.** Walton family-owned developer Blue Crane purchased 2,700 acres of land in 2024, with plans for future use and development still to be announced.

Challenges:

- **Limited job opportunities.** The city's employment base grew the slowest among cities along the Greenway, adding only 330 jobs (+15%).
- **The city is a bedroom community.** 94% of working residents commute to workplaces outside of the city.



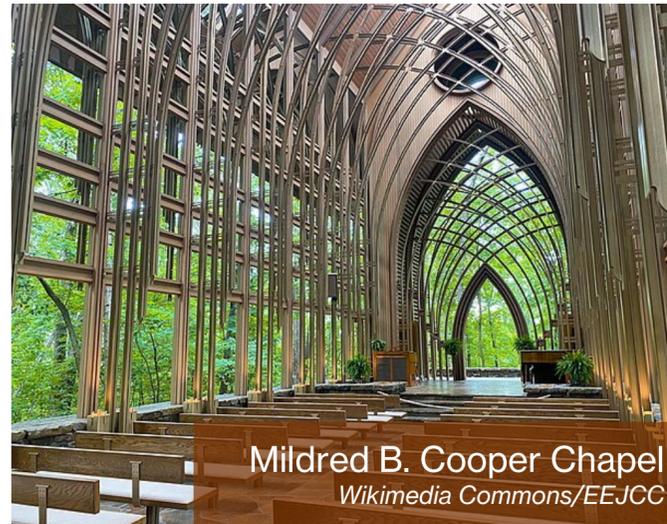
Tanyard Creek
Photo: Wikimedia
Commons/Natalieshort

PLACE INVESTMENT – BELLA VISTA

As a gateway to Arkansas, Bella Vista's commercial activity is concentrated along U.S. Route 71 and other highways. The city leverages its natural setting with trails, parks, golf courses, and other amenities supporting outdoor recreation.



Tanyard Creek Nature Trail
Flickr/bobsacks



Mildred B. Cooper Chapel
Wikimedia Commons/EEJCC



Bluebird Sculpture Trail
Discover Bella Vista

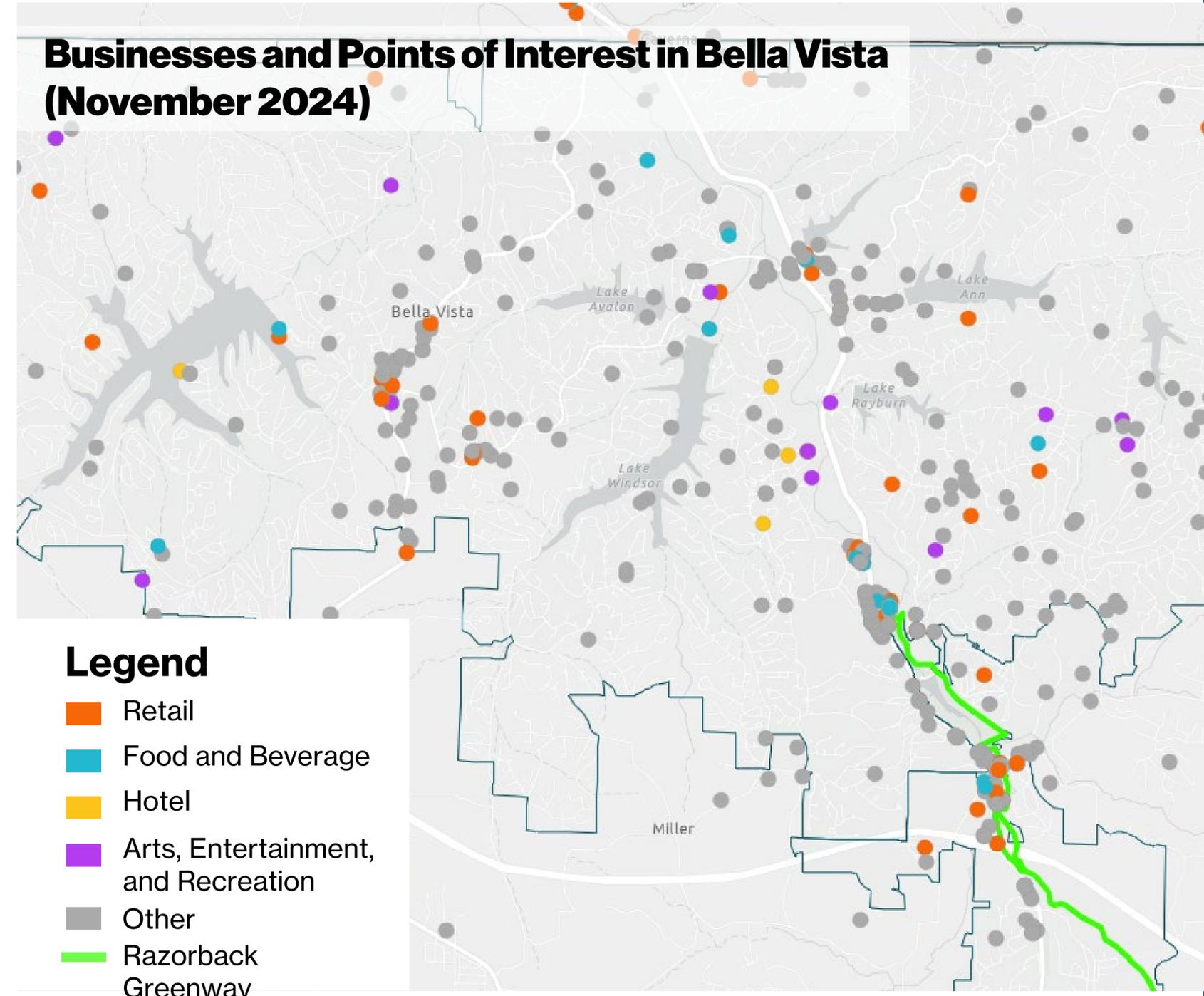


Dogwood Golf Course
Discover Bella Vista

Bella Vista Trail System

Bella Vista is home to over 100 miles of trails. In 2024, Walton family-owned developer Blue Crane purchased 2,700 acres of land in Bella Vista, stating an intention that future development would bolster outdoor recreation.

Sources: *Talk Business & Politics; DataAxle via Esri Business Analyst.*



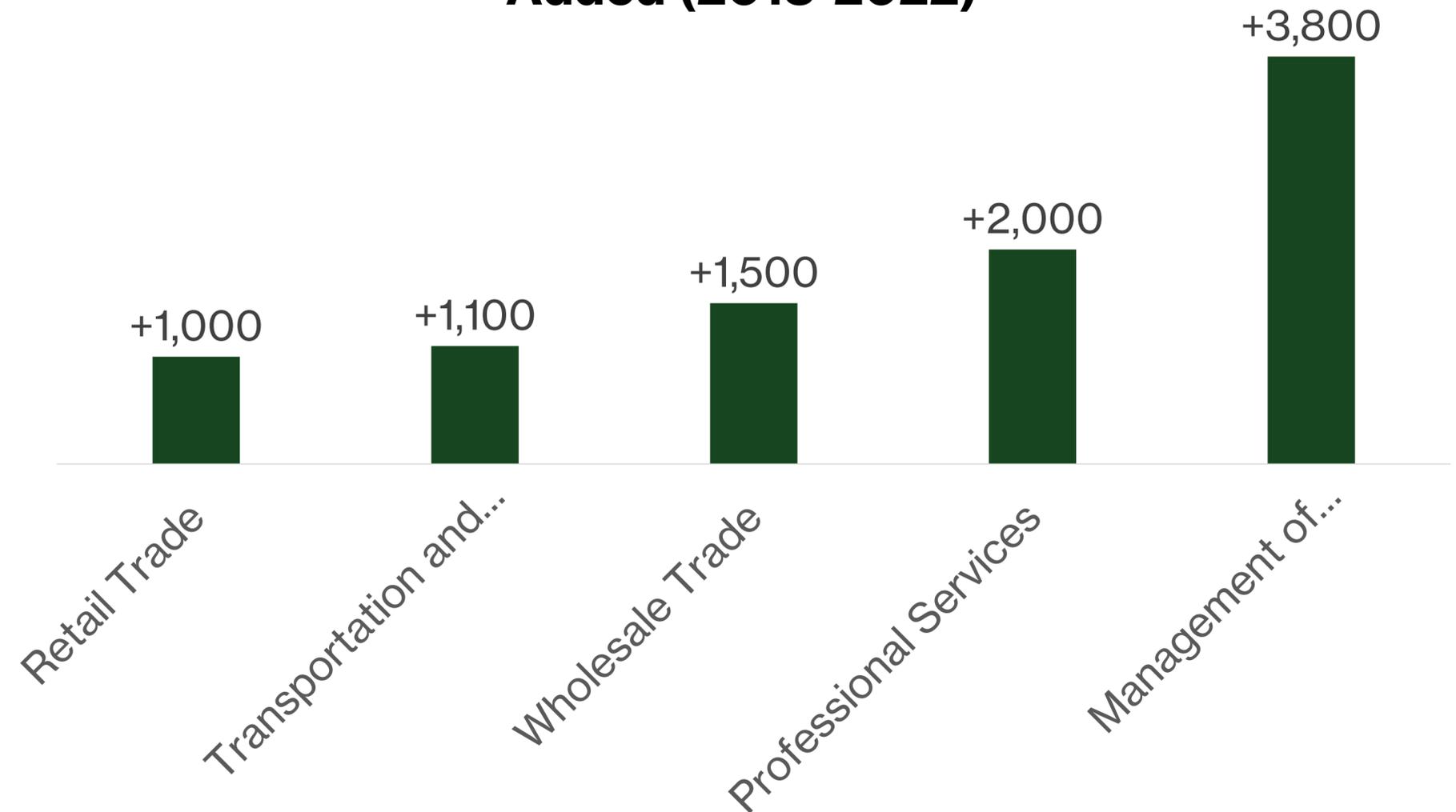
INDUSTRY AND EMPLOYMENT GROWTH – BENTONVILLE

Bentonville’s job growth has been driven by Walmart’s expansion (including its new headquarters campus and consolidation of corporate employees to headquarters), and many of Walmart’s suppliers.

Employment in Bentonville

| | |
|---------------------------|--------------------------------------|
| Total Jobs in City (2022) | 55,002 |
| Job Growth (2013-22) | +36% <i>(+14,507 jobs)</i> |
| Unemployment Rate (2023) | 2.3% |

Fastest Growing Sectors in Bentonville by Jobs Added (2013-2022)



FUTURE CORRIDOR GROWTH - BENTONVILLE

Bentonville's economy is booming, but lower-income residents and businesses that cater to them are vulnerable to displacement. Future investments in the Greenway should take care not to exacerbate these trends.

Opportunities

- **Corporate headquarters drives job growth in high-income sectors**, with the fastest growing industries from 2013 to 2022 being Management (+3,800 jobs) and Professional Services (+2,000 jobs). Both industries represent about 40% of the city's employment gains during that period.
- **Accordingly, household incomes are growing rapidly.** Median household income grew from 2013 (\$82K) to 2023 (\$108K), second only to Johnson in growth.
- **Residents are highly-educated and becoming more so.** College graduates grew as a share of the population rapidly from 2013 (41%) to 2023 (54%).
- **Bentonville – especially its downtown – is a regional destination**, host to amenities like The Momentary and Scott Family Amazeum.

Challenges

- **Rapid growth makes lower-income residents and businesses vulnerable to displacement.** Retail rents in downtown Bentonville averaged about \$24/SF in 2024, or 16% higher than Northwest Arkansas overall.



Walmart Visitor Center
Photo: Wikimedia Commons/Bobak

PLACE INVESTMENT – BENTONVILLE

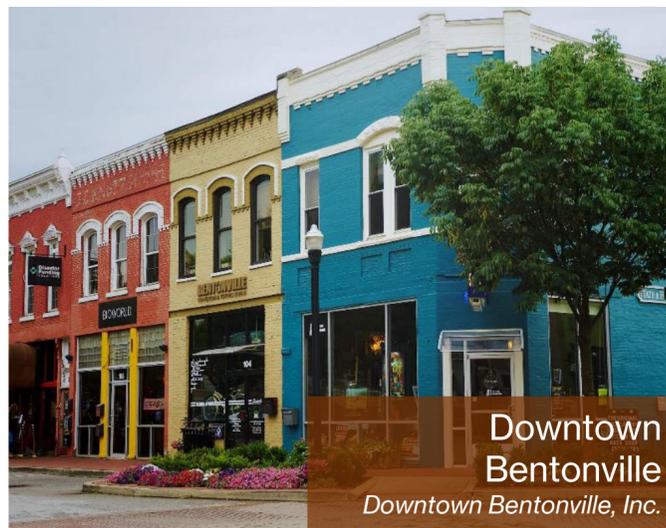
Bentonville's walkable downtown offers a variety of upscale retail establishments, along with attractions like The Momentary. Downtown Bentonville has grown into a premier regional destination, and retail rents have increased accordingly.



Bentonville City Square
Shutterstock/Roberto Galan



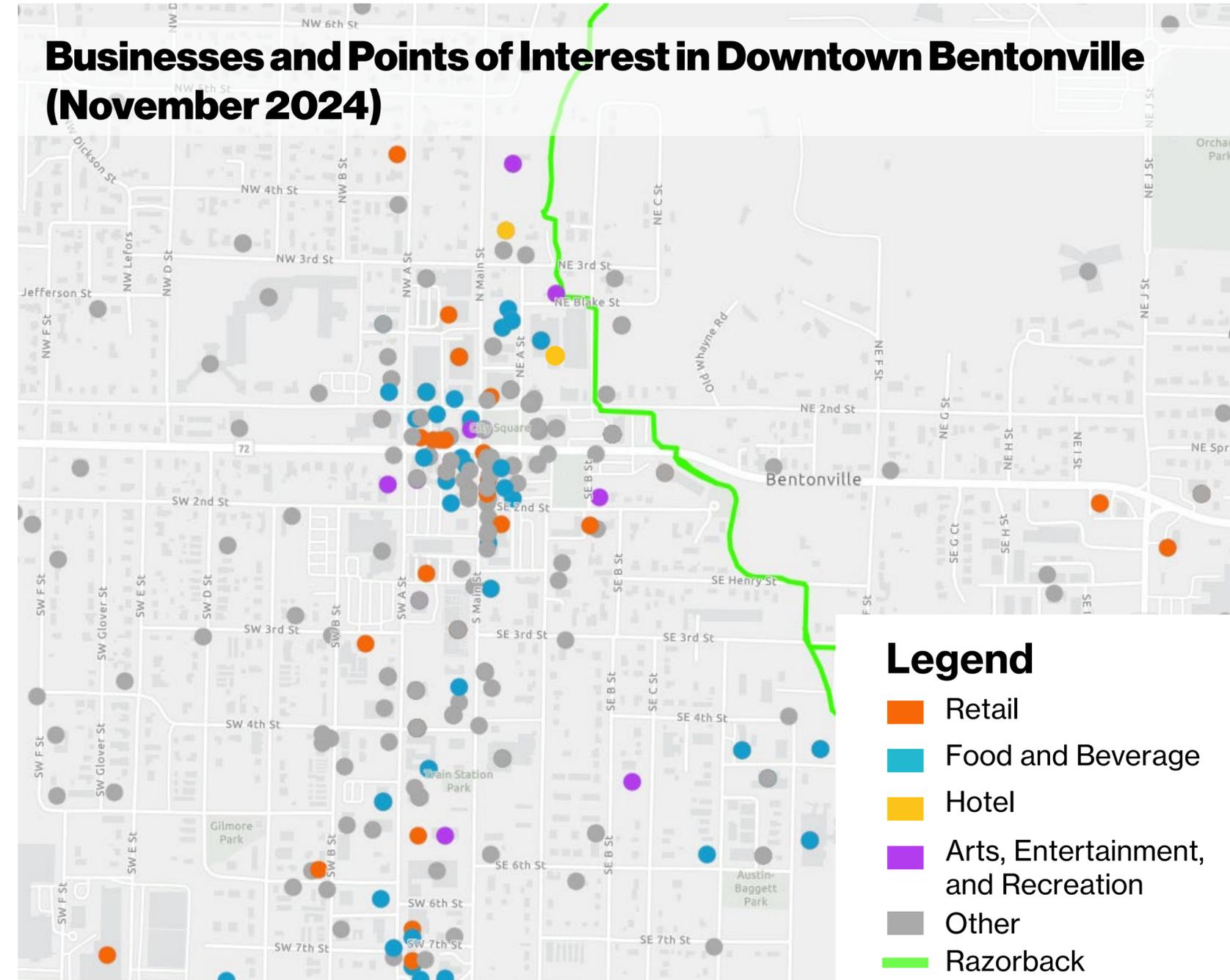
Walmart Museum
Flickr/Martin Lewison



Downtown Bentonville
Downtown Bentonville, Inc.



The Momentary
The Momentary



- #### Legend
- Retail
 - Food and Beverage
 - Hotel
 - Arts, Entertainment, and Recreation
 - Other
 - Razorback Greenway

Downtown Bentonville* Retail Rents

Rents PSF/year (2024)

\$24.05

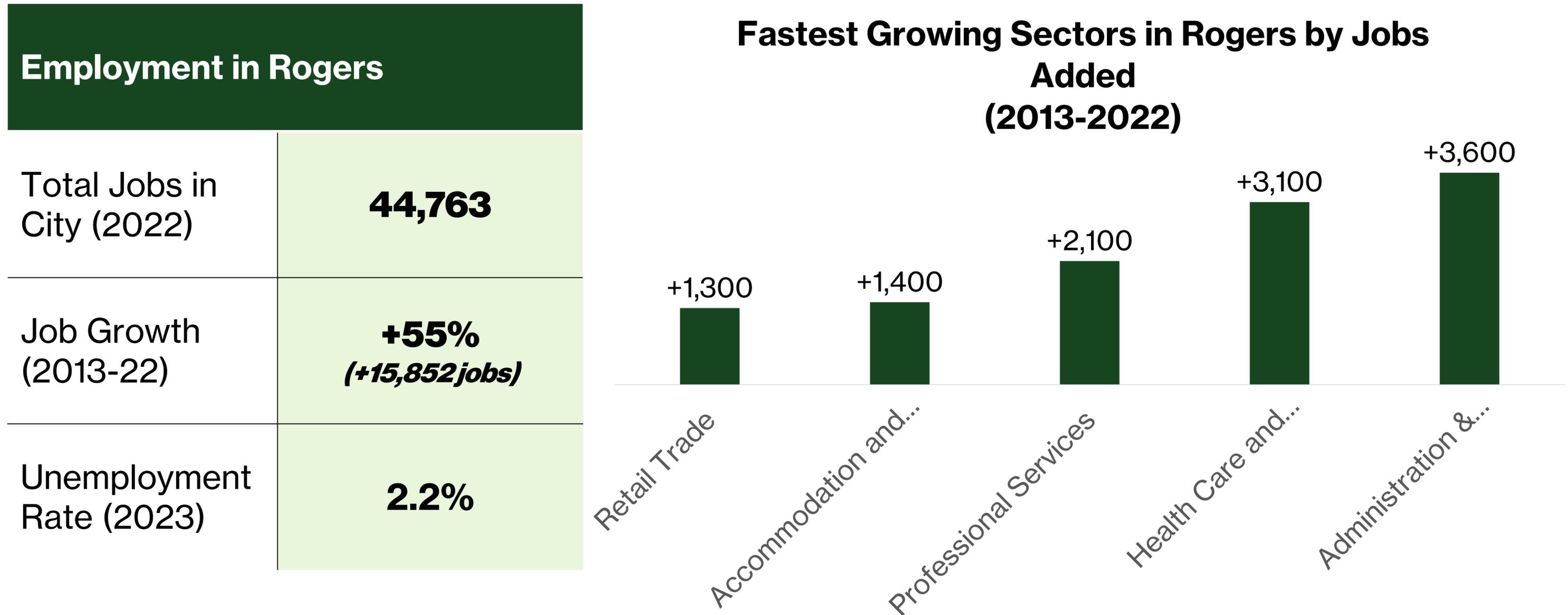
Rent Growth (2015-24)

+61%

Sources: CoStar; DataAxle via Esri Business Analyst.

INDUSTRY AND EMPLOYMENT GROWTH – ROGERS

Rogers added the most jobs from 2013 to 2022 among the cities along the Greenway. Growth in the Administration, Support, and Waste Management sector was dependent on growth in other industries, whereas growth in Health Care was fueled in part by a major expansion of Mercy Hospital completed in 2019.



FUTURE CORRIDOR GROWTH - DOWNTOWN ROGERS

Real estate and employment in Rogers is growing. Future investments in the Greenway should take care to avoid exacerbating cost of living challenges and extend opportunities to those with limited English proficiency and without college degrees.

Opportunities

- **Rogers experienced the most rapid job growth among Greenway cities**, with total employment growing by 55% from 2013 to 2022.
- **Significant investment in downtown Rogers real estate is ongoing**, with the First Street Flats opened, and Ritter & Spool apartments receiving construction permits in 2025.

Challenges:

- **Median earnings (\$49K) are below living wages for dual-earner, two-child households.** Households may feel pressure to leave Rogers to afford raising children.
- **66% of residents do not hold college degrees** – that population is less able to access higher paying jobs.
- **12% of residents speak English less than “very well,”** meaning they can access fewer and lower-paying jobs, and less able to navigate legal aspects of housing system like leases.



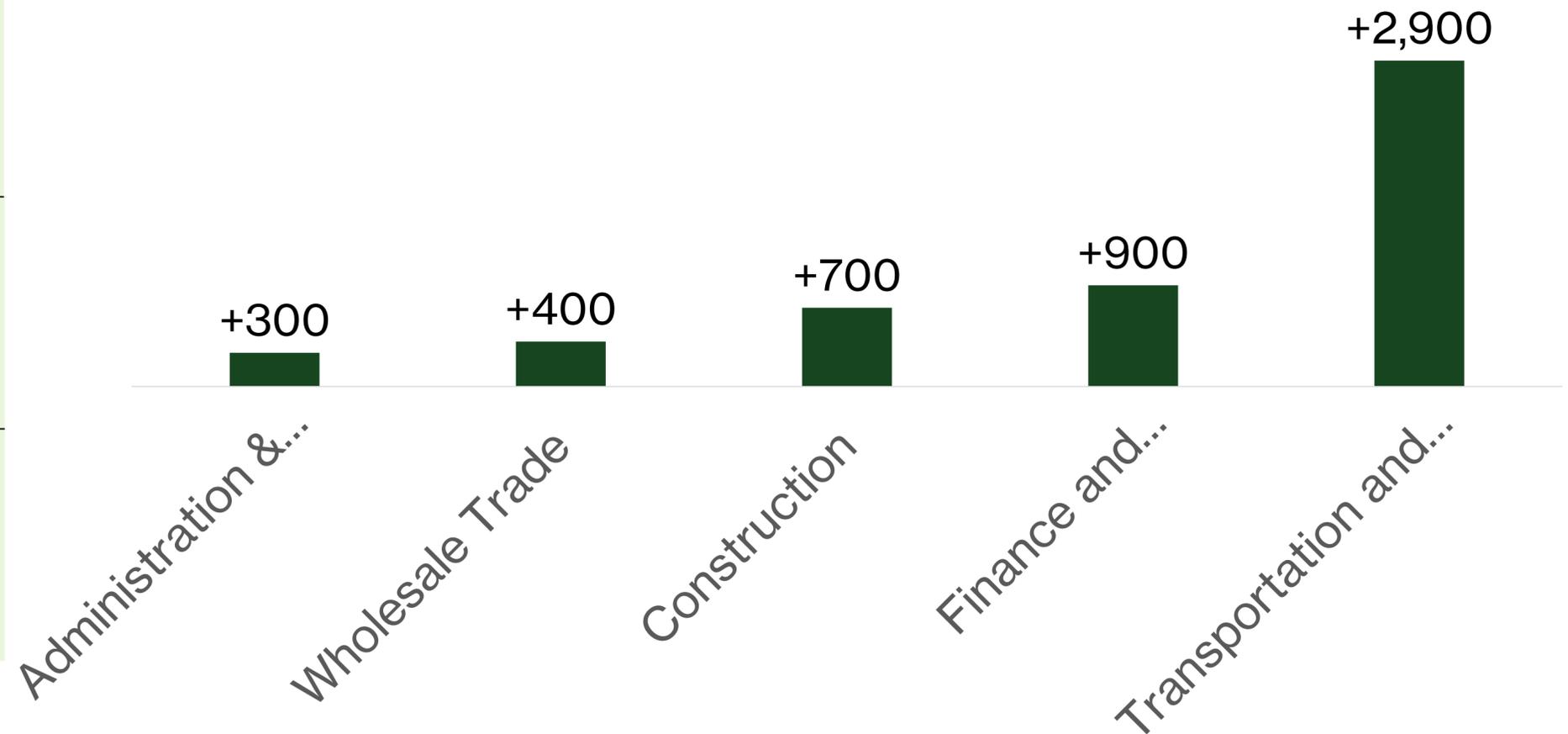
Lake Atalanta
Photo: Wikimedia
Commons/Brandonrush

INDUSTRY AND EMPLOYMENT GROWTH – LOWELL

Employment in Lowell grew by 54% from 2013 to 2022. 60% of jobs added in Lowell during that period were in the Transportation and Warehousing sector, supported by the headquarters of Fortune 500 logistics company JB Hunt.

| Employment in Lowell | |
|---------------------------|-------------------------------------|
| Total Jobs in City (2022) | 13,896 |
| Job Growth (2013-22) | +54% <i>(+4,860 jobs)</i> |
| Unemployment Rate (2023) | <i>Not available</i> |

Fastest Growing Sectors in Lowell by Jobs Added (2013-2022)



FUTURE CORRIDOR GROWTH - LOWELL

Lowell's economic growth is buoyed by the headquarters and operations of logistics company JB Hunt. Future investment in the Greenway can aim to offer opportunities to this city's workforce and capitalize on ongoing development of the new Kathleen Johnson Memorial Park.

Opportunities

- **Lowell's employment base is growing rapidly, especially in blue collar industries.** 60% of job growth from 2013 to 2022 was in Transportation and Warehousing, supported by the headquarters and operations of logistics company JB Hunt.
- **The new Kathleen Johnson Memorial Park is an emerging opportunity to better serve Lowell residents and attract visitors.** The park is already connected via trail to the Greenway and when the 100-acre facility is fully built, could support special events and other activations.

Challenges:

- **Median earnings (\$54K) are below living wages for dual-earner, two-child households.** Households may feel pressure to leave Lowell to afford raising children.
- **71% of residents do not hold college degrees** – that population is less able to access higher paying jobs.
- **10% of residents speak English less than “very well,”** meaning they can access fewer and lower-paying jobs, and less able to navigate legal aspects of housing system like leases.



Lowell City Hall

Photo: Wikimedia
Commons/Brandonrush

PLACE INVESTMENT – LOWELL

Lowell's main commercial corridor serves residents and visitors along U.S. Route 71B/Bloomington Street and attracts visitors with entertainment and events. When fully built, Kathleen Johnson Memorial Park will be a regional destination along the Greenway.



The Grove Entertainment Complex
Only in Arkansas



Kathleen Johnson Memorial Park
Arkansas Democrat-Gazette



Mudtown Days Festival at Ward Nail Park
Arkansas Democrat-Gazette

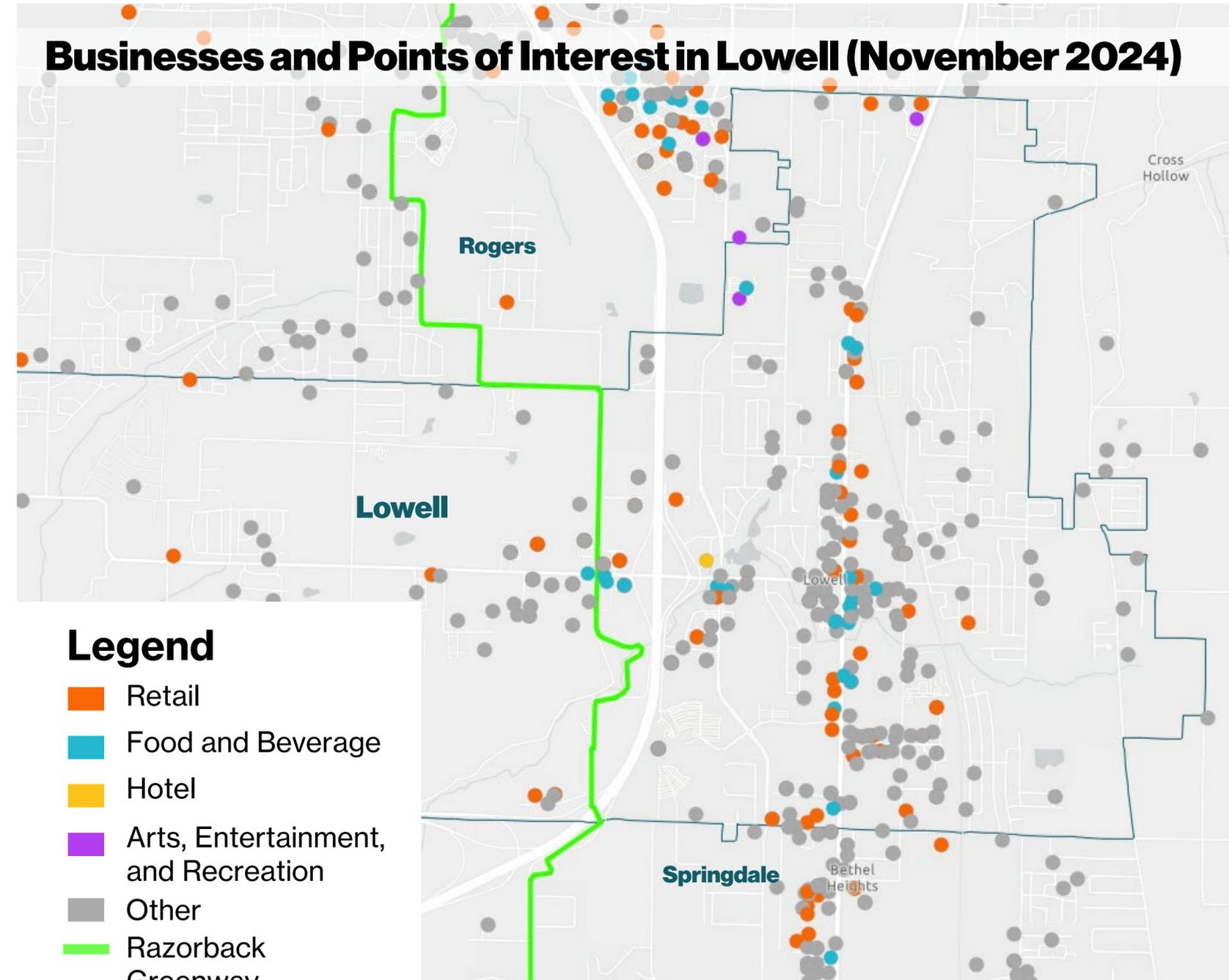


Bloomington Street
Arkansas Democrat-Gazette

Kathleen Johnson Memorial Park

Kathleen Johnson Memorial Park is Lowell's newest park. Its first phase opened in 2023 including a playground, market pavilion, and connecting trail to the Razorback Greenway. When fully built it will span 100 acres.

Sources: DataAxle via Esri Business Analyst; Arkansas Democrat-Gazette.

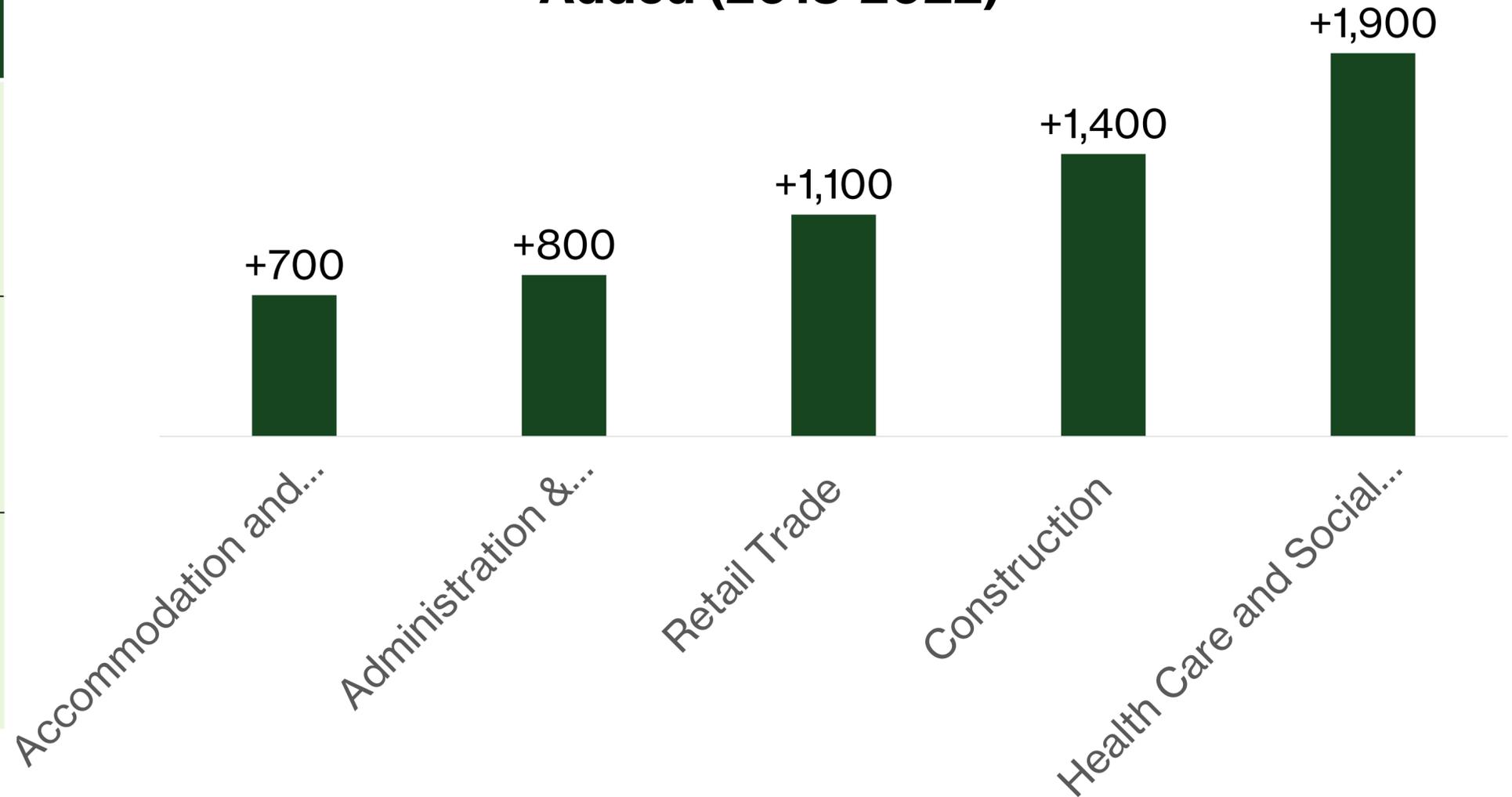


INDUSTRY AND EMPLOYMENT GROWTH – SPRINGDALE

Manufacturing is the largest sector by employment in Springdale, supported by Tysons Foods and other firms. Its growth in Springdale is outpaced by other sectors like Health Care: Arkansas Children’s opened a new hospital in 2018, and Mercy opened a new multi-specialty clinic in 2019.

| Employment in Springdale | |
|---------------------------|-------------------------------------|
| Total Jobs in City (2022) | 49,423 |
| Job Growth (2013-22) | +22% <i>(+9,054 jobs)</i> |
| Unemployment Rate (2023) | 2.2% |

Fastest Growing Sectors in Springdale by Jobs Added (2013-2022)



FUTURE CORRIDOR GROWTH - SPRINGDALE

Springdale is home to a growing and diverse community. Investments in the Greenway in Springdale should leverage its integration within the city's growing downtown but also take care to avoid worsening displacement pressures.

Opportunities

- **Springdale is home to the headquarters of Tyson Foods, supporting blue collar employment.** In 2022, 12K (25% of total) of jobs in Springdale are in Manufacturing or Transportation and Warehousing.
- **The city's two hospitals and major multi-specialty clinic offer economic opportunity.** Health Care employment is expanding rapidly, (1,900 jobs added (+38%) from 2013 to 2022) to meet the needs of the region's growing population.
- **Significant mixed-use development in Downtown Springdale is ongoing,** with developments like Big Emma and Via Emma underway, proximate to the Greenway and other amenities.

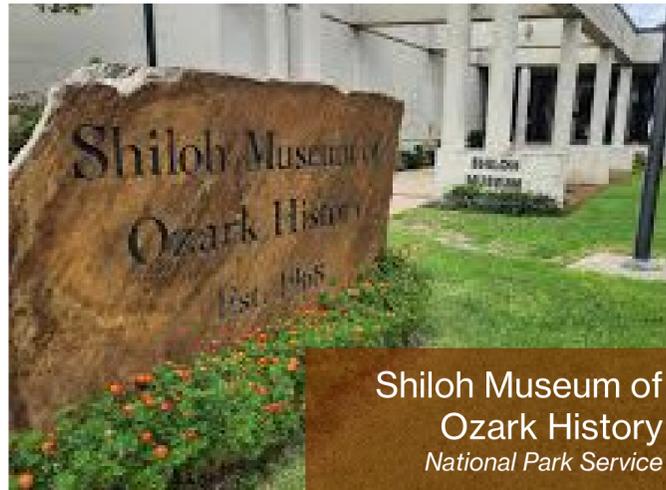
Challenges:

- **Median earnings (\$40K) are below living wages for even a single adult without dependents.** Many households may feel pressure to leave Springdale to afford the cost of living and to raise children.
- **77% of residents do not hold college degrees** – that population is less able to access higher paying jobs.
- **19% of residents speak English less than “very well,”** meaning they can access fewer and lower-paying jobs, and are less able to navigate legal aspects of housing system like leases.

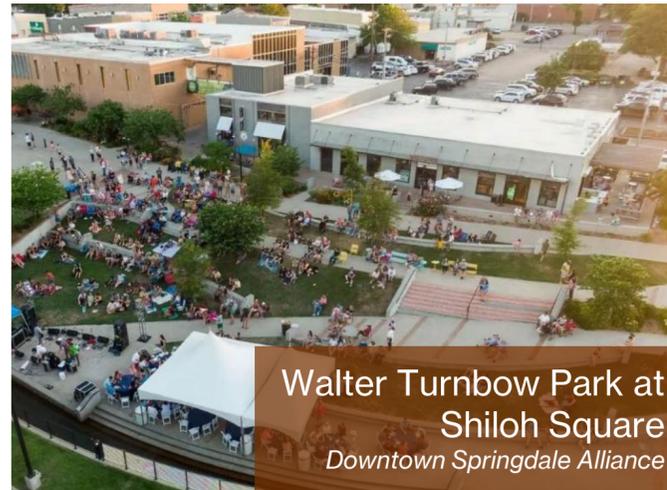


PLACE INVESTMENT – SPRINGDALE

Springdale’s commercial corridors are split between walkable Emma Avenue, directly linked to the Greenway, and other surrounding car-oriented districts. Downtown Springdale has recently seen investments like Big Emma and the renovation of Luther George Park.



Shiloh Museum of Ozark History
National Park Service



Walter Turnbow Park at Shiloh Square
Downtown Springdale Alliance



Rendering of Big Emma Development
Talk Business & Politics



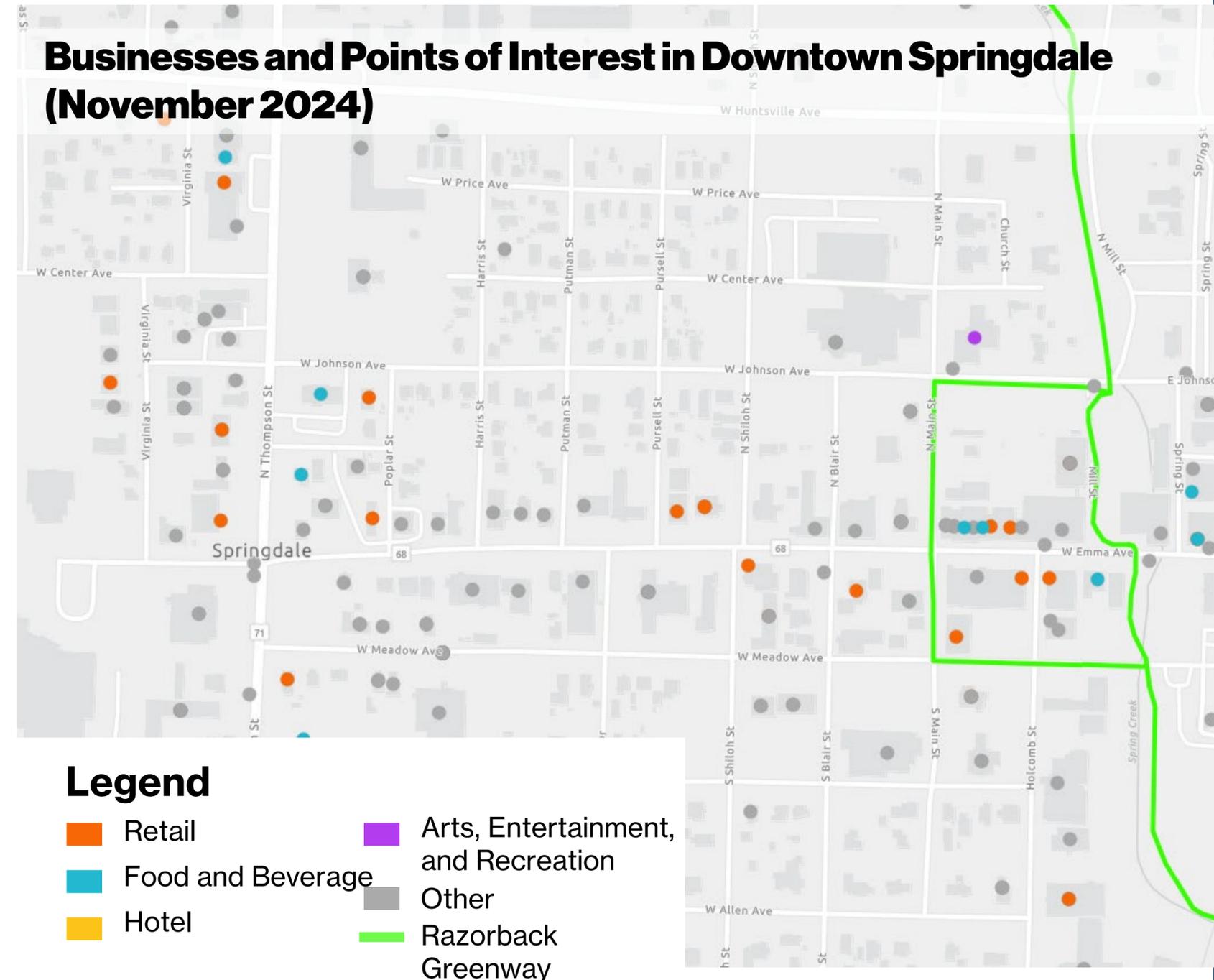
Luther George Park
Walton Family Foundation

Pipeline Developments in Downtown Springdale

- **Big Emma:** 77 apartments, two-ground floor commercial spaces, expected completion summer 2025
- **Via Emma:** 131 residential units, 12.5K SF commercial space; building permits received February 2025

Sources: DataAxle via Esri Business Analyst; Talk Business & Politics.

Businesses and Points of Interest in Downtown Springdale (November 2024)



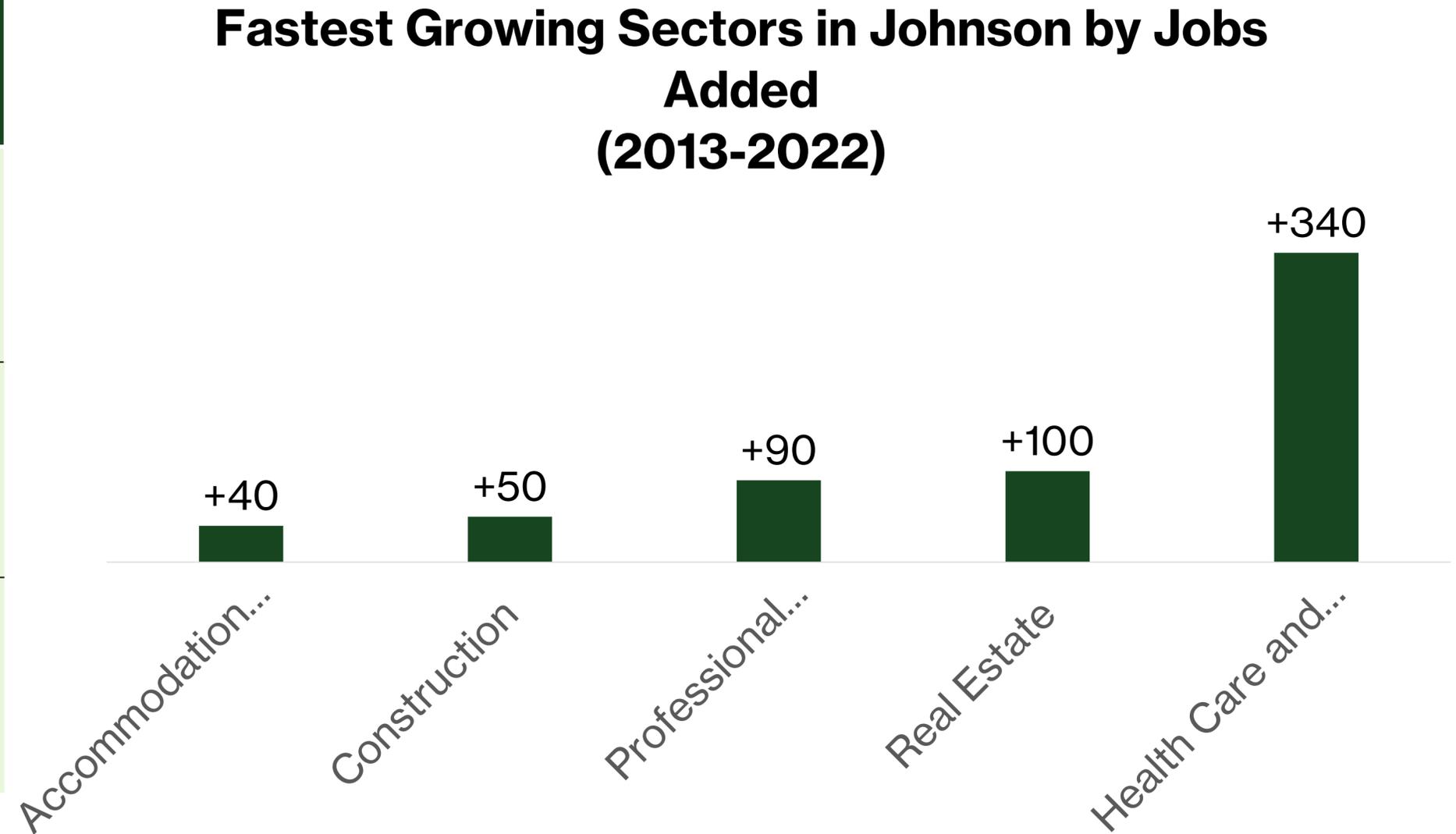
Legend

- Orange square: Retail
- Blue square: Food and Beverage
- Yellow square: Hotel
- Purple square: Arts, Entertainment, and Recreation
- Grey square: Other
- Green line: Razorback Greenway

INDUSTRY AND EMPLOYMENT GROWTH – JOHNSON

Johnson has the smallest employment base of all cities along the Greenway, though it also grew the fastest in percentage terms. Half of jobs added were in the Health Care sector, with several medical offices and the Willow Creek Women’s Hospital located in the city west of I-49.

| Employment in Johnson | |
|---------------------------|-----------------------------------|
| Total Jobs in City (2022) | 1,701 |
| Job Growth (2013-22) | +59% <i>(+628 jobs)</i> |
| Unemployment Rate (2023) | <i>Not available</i> |



Source: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD); Arkansas Division of Workforce Services, Labor Market Information Section, Employment and Unemployment Statistics – LAUS.

FUTURE CORRIDOR GROWTH - JOHNSON

Johnson is the smallest among Greenway cities in terms of population and employment but is also experiencing job and income growth. Investments in the Greenway should support these positive trends.

Opportunities

- **The city is strategically positioned between Springdale and Fayetteville along the I-49 corridor.** This access has supported foot traffic contributing to Johnson's growth – such as in its destination restaurants.
- **Johnson's Health Care sector is growing, supported by a cluster of medical offices anchored by Willow Creek Women's hospital.** While Johnson has a small employment base, it grew rapidly from 2013 to 2022 (+59%), with half of that growth in the Health Care sector.
- **Household incomes grew the most rapidly among Greenway cities,** from 2013 (\$60K) to 2023 (\$87K).
- **There is a significant development pipeline with the new planned Johnson Square neighborhood.** Construction of the first phase with 66 apartments and 79K SF of commercial space, is underway.

Challenges:

- **Johnson has a limited economic base today.** Among Greenway cities, it has the smallest population and fewest jobs, and its population grew the most slowly from 2013 to 2023 (+6%).
- **The city is a bedroom community.** 98% of working residents commute to workplaces outside of the city.



Johnson Mill Hotel
Photo: Wikimedia
Commons/Brandonrush

PLACE INVESTMENT – JOHNSON

Johnson's commercial activity is primarily concentrated along Main Drive, including Wright's Barbecue, a Johnson-founded restaurant named best barbeque in Arkansas by Southern Living in 2025. New commercial hubs are also being constructed, with the first phase of the new Johnson Square neighborhood underway.



Wright's Barbecue
Talk Business & Politics



Pizzeria Ruby
Novo Studio via Arkansas Times



Rendering of Warehouse District Development
Bennett Commercial Real Estate via NWA Daily

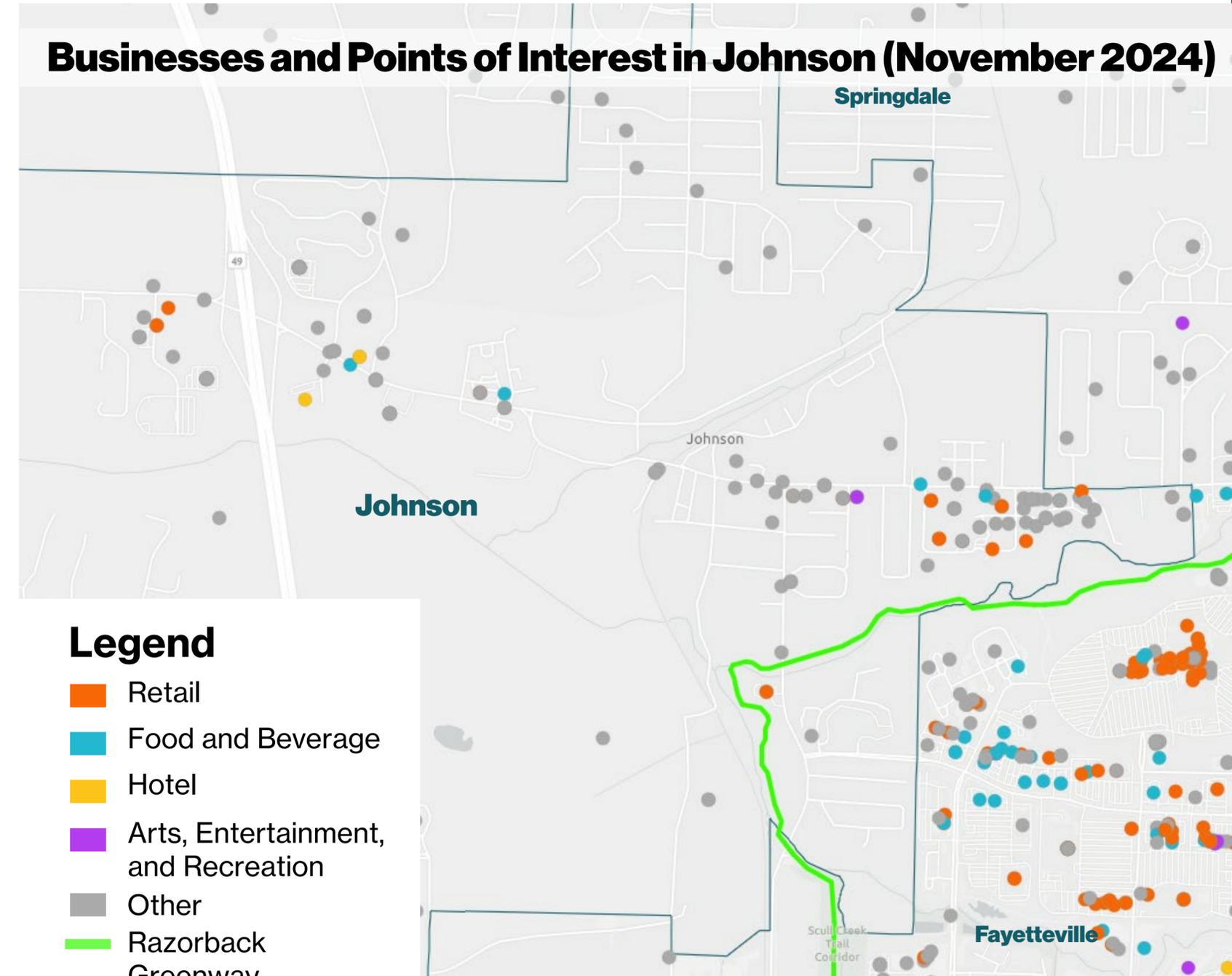


Blessings Golf Club
Arkansas Razorbacks

Warehouse District Mixed-Use Development

Next phase of the planned Johnson Square neighborhood: a \$55M, 6-acre mixed-use development including 66 apartments and 79K SF of retail, restaurant, office, and medical space, with expected completion in 2026.

Sources: DataAxle via Esri Business Analyst; Southern Living; Talk Business & Politics.

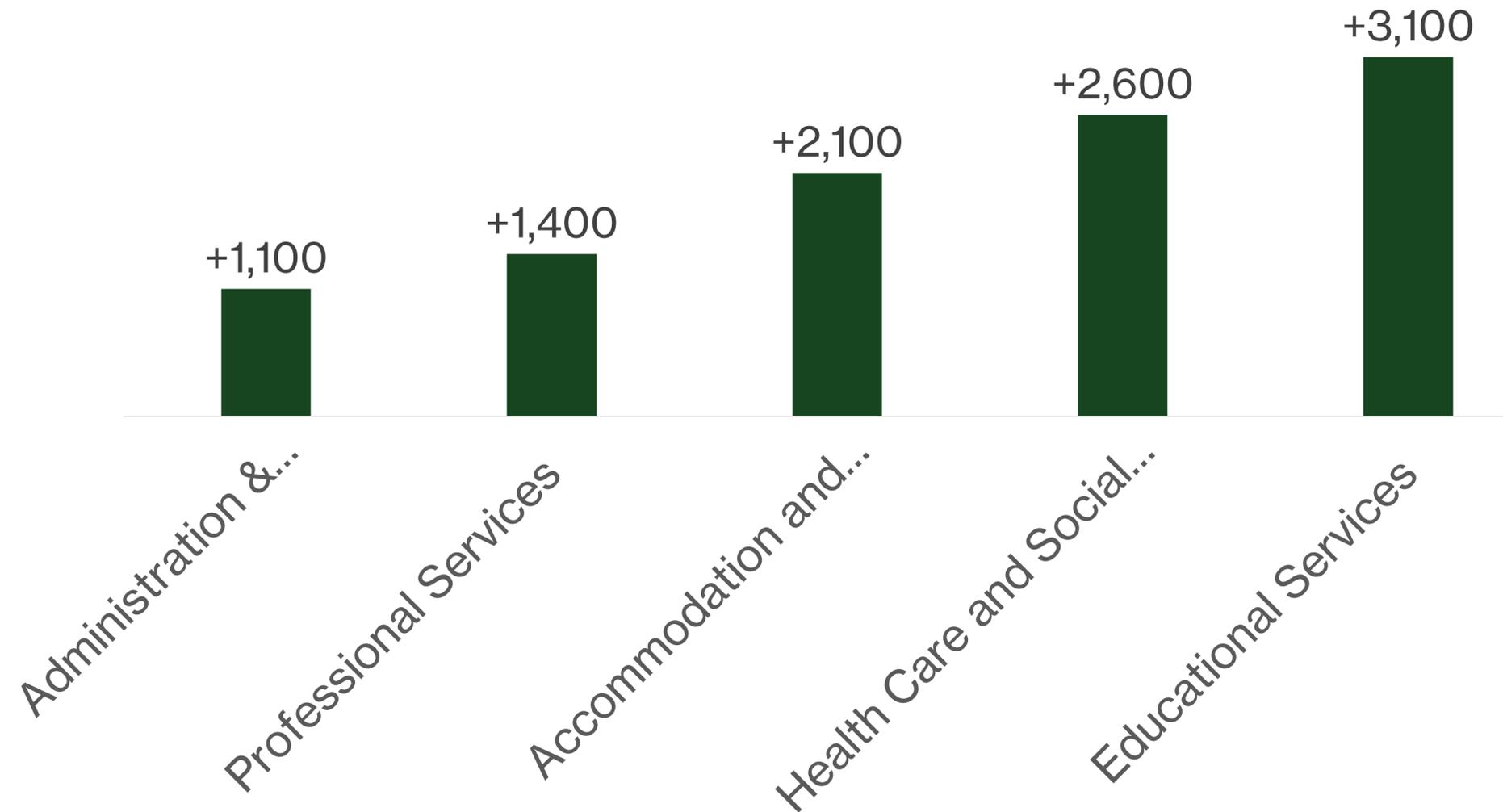


INDUSTRY AND EMPLOYMENT GROWTH – FAYETTEVILLE

The University of Arkansas (including its outpatient medical clinic) is the largest employer in Fayetteville. Its expansion, alongside those of other hospital systems (e.g., Northwest Health, Washington Regional Medical Center), and new senior living facilities drove significant job growth in the Education and Health Care and Social Assistance sectors from 2013 to 2022.

| Employment in Fayetteville | |
|----------------------------|--------------------------------------|
| Total Jobs in City (2022) | 61,368 |
| Job Growth (2013-22) | +31% <i>(+14,489 jobs)</i> |
| Unemployment Rate (2023) | 2.5% |

Fastest Growing Sectors in Fayetteville by Jobs Added (2013-2022)



FUTURE CORRIDOR GROWTH - FAYETTEVILLE

Fayetteville's institutional anchor is critical for regional growth, providing jobs and attracting talent. Its student population is low-earning but contributes to a pipeline of qualified and educated workers to support regional industries.

Opportunities

- **Fayetteville's anchor continues to grow and offer job opportunities.** The University of Arkansas – Fayetteville has driven job growth in higher-income professions like Education, Health Care, and Professional Services (collectively adding 7,100 jobs from 2013 to 2022, half of the city's job growth during that period). These industries are projected to grow by 14% (Education and Health Care) and 16% (Professional Services) from 2022 to 2023.¹
- **Fayetteville is a cultural center**, home to multiple theaters, museums, and live entertainment venues. These attract foot traffic which area businesses benefit from.

Challenges:

- **Limited job diversity.** A university town, Fayetteville's job opportunities are skewed towards occupations that require college degrees. Growth in sectors most accessible to those without college degrees was most rapid in low-income sectors like Accommodation and Food Services and Administration (22% of jobs gained from 2013 to 2023).
- **Cost of living exceeds earnings.** Median individual earnings (\$50K) are at living wages for Washington County² for an adult in a dual-earner, two child household – many households may face cost of living pressures.



University of Arkansas
Photo: Wikimedia Commons/Michael Barera

1) Regional growth projections by Arkansas Division of Workforce Services for the Northwest Arkansas Development Area.

2) Living wage for Fayetteville is likely higher than the Washington County-wide average.

PLACE INVESTMENT – FAYETTEVILLE

Downtown Fayetteville is host to the University of Arkansas, as well as walkable districts along Dickson Street and Block Avenue that host retail, cafes, restaurants, bars, and cultural amenities.



TheatreSquared
Walton Family
Foundation



Donald W. Reynolds Razorback
Stadium
Wikimedia Commons/Brandonrush



Dickson Street Entertainment
District
Arkansas Tourism



Wilson Park
Experience
Fayetteville

TheatreSquared

TheatreSquared, a Fayetteville theatre company, opened its \$31M permanent home in 2019 with support from public and private funders like the City of Fayetteville, State of Arkansas, and Walton Family Foundation.

Businesses and Points of Interest in Downtown Fayetteville (November 2024)

