

NWMO Alumni & Resident Survey Responses

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Development

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Outline

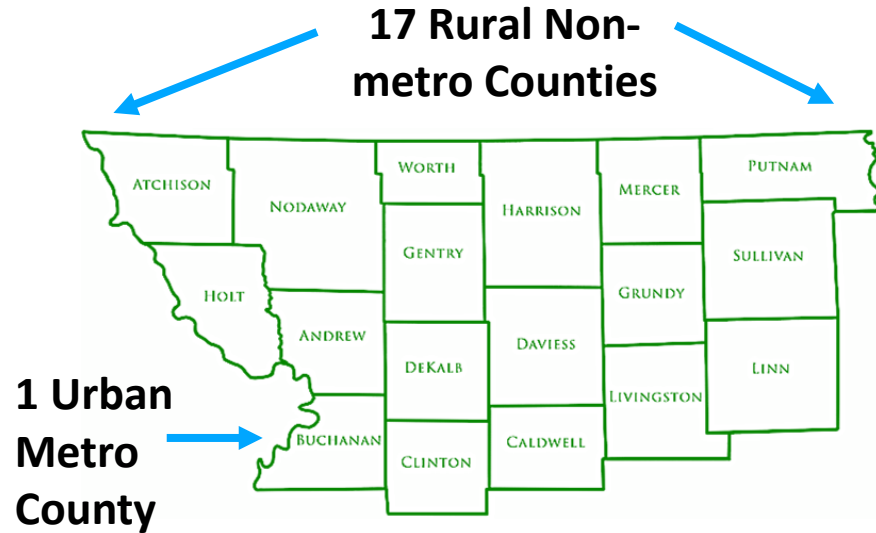
- Project Motivation and Response Overview
- The Best Things About NWMO
- What Drives Migration Decisions in NWMO?
- What Will Influence Where Survey Respondents Move in the Next Five Years?
- How Can Maximize NWMO Strengthen the Region?
- COVID-19 and Migration Attitudes
- Policy Implications

Project Motivation and Response Overview

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Survey rationale



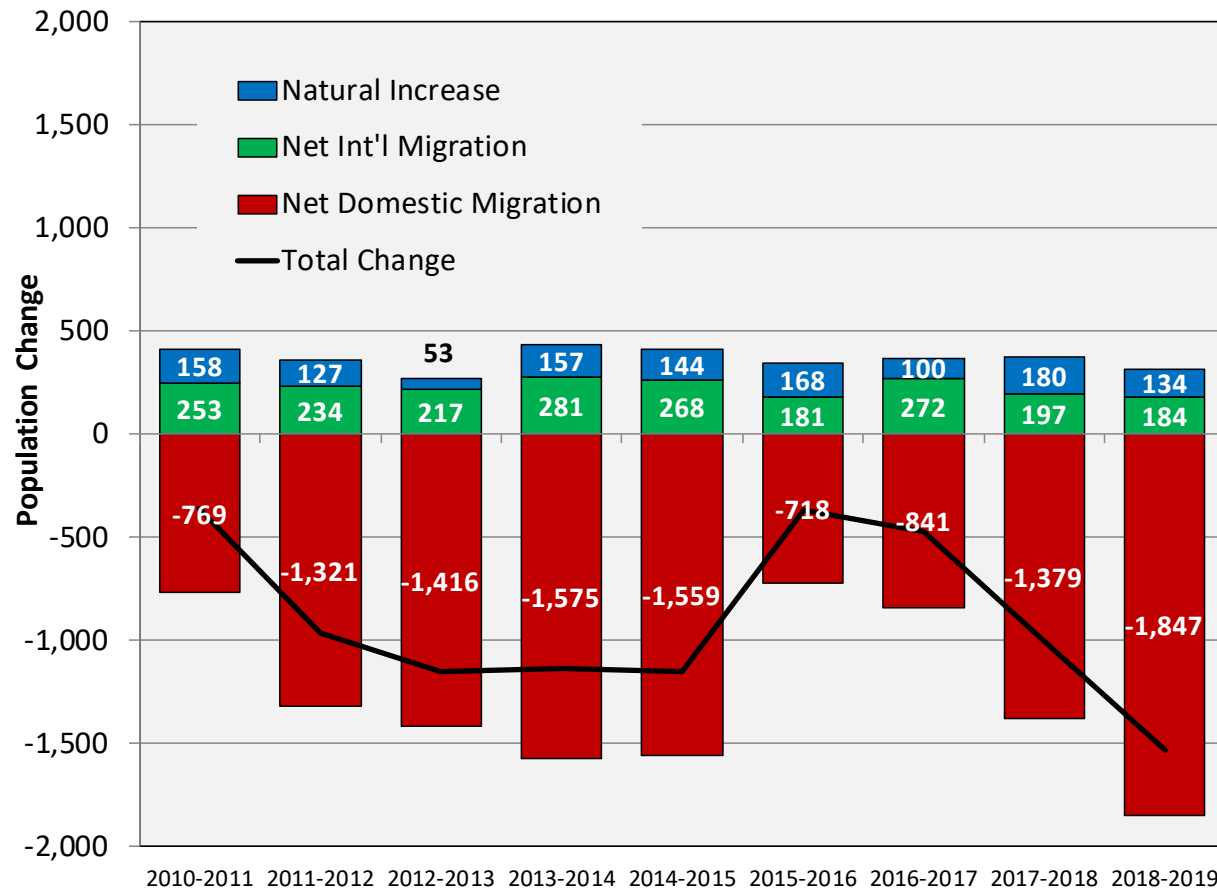
- How can leaders in Northwest Missouri stem population loss?
- Research in low amenity areas shows:
 - Return-migrants are more likely to migrate to a rural community than migrants with no roots in the region.
 - Family ties and attachment to place outweigh economic opportunities for return-migrants.
 - Return-migrants bring life experiences, new skills and new perspectives.



Persistent population loss affects many rural regions

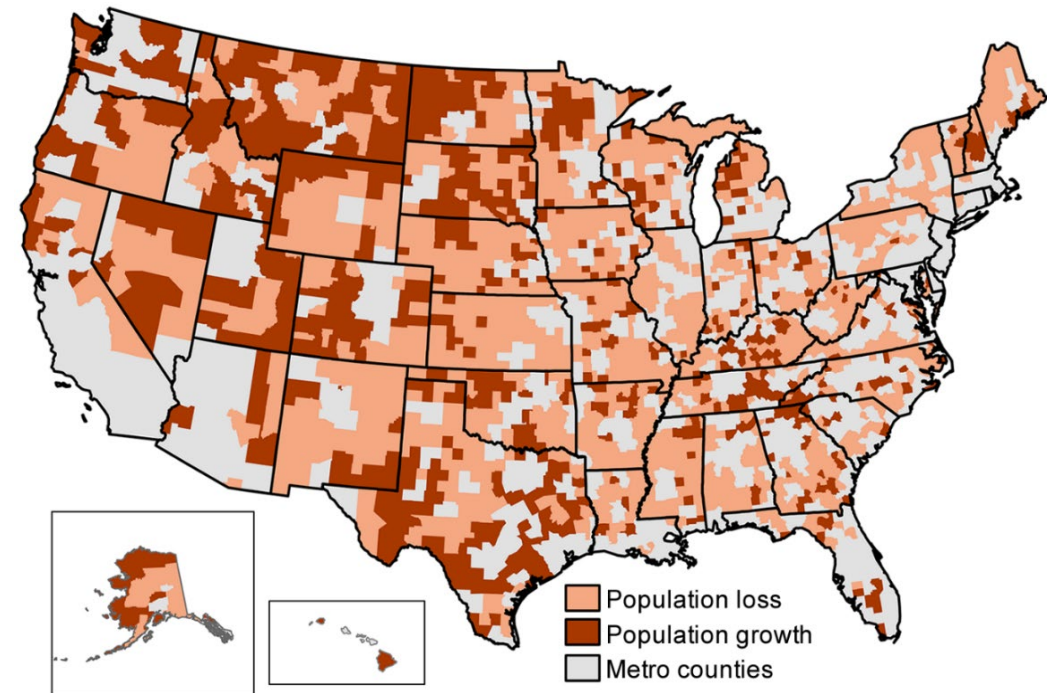
Why do people leave? Why do they stay?

Components of Population Change: Northwest Missouri



Source: US Census Bureau, Population Estimates Program, V2019

U.S. Nonmetro Population Change, 2010-17



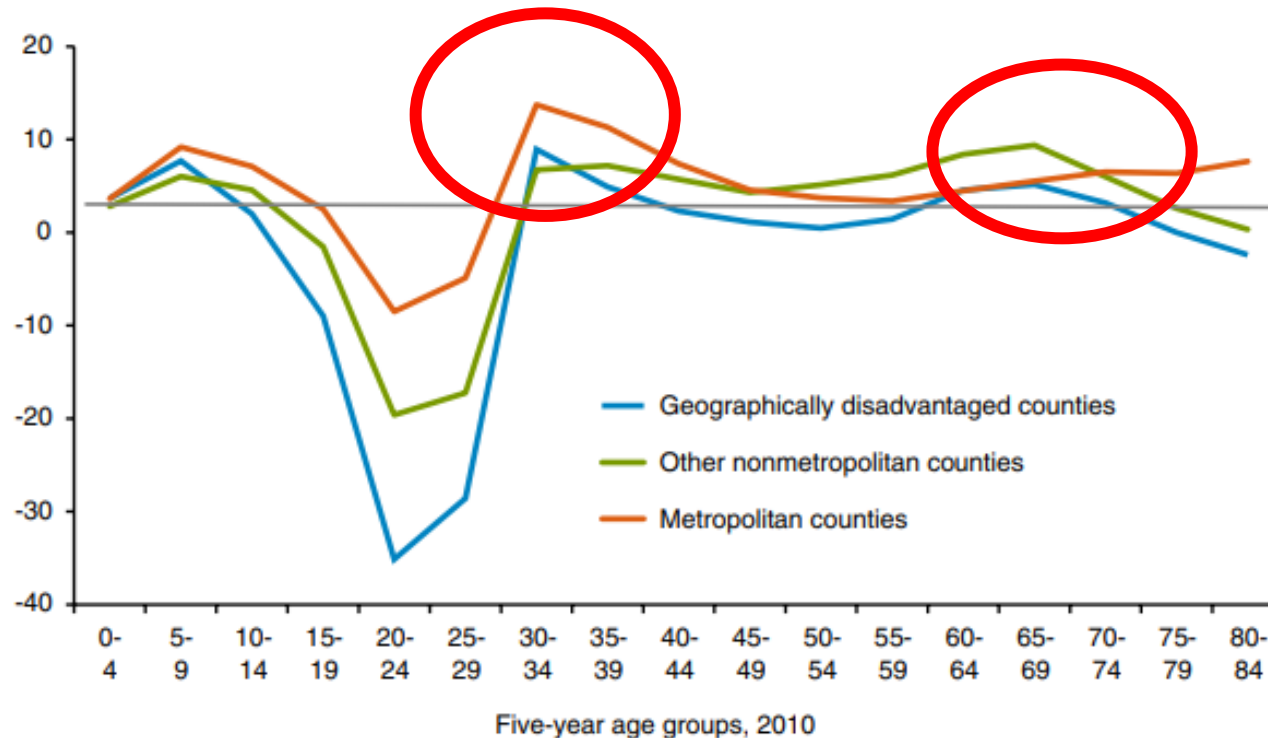
Source: USDA. Economic Research Service using data from the U.S. Census Bureau.

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Migration follows age specific patterns

Net migration by age, 2000-10, relative to county population, 2010

Median percent county population change due to migration



Note: Geographically disadvantaged counties are geographically remote and relatively lacking in scenic amenities.
Source: USDA, Economic Research Service based on estimates from University of Wisconsin-Madison: <http://www.net-migration.wisc.edu/>

Northwest Missouri is considered a geographically disadvantaged region, defined as having low natural amenities relative to a national scale.

Research suggests NWMO is most likely to be successful attracting people between the ages of:

- 30-40
- 60-70

Purpose of the survey

- How can leaders in this low amenity, rural region focus their efforts to reduce net population loss?
 - The survey was a discovery process in work towards the goal of keeping and attracting talent to the region that feeds innovation and the entrepreneurship ecosystem necessary for building a more thriving region.
- What assets or characteristics are most valued within the region?
- Has COVID-19 created opportunities for rural communities to reattract out-migrants? Does this vary with age?

Survey details



Primary Targets: NWMO high school alumni ages 23-47

Secondary Targets: Current and former residents with a strong tie to the region ages 18-100+

Survey open: July 14-September 30, 2020

Promoted through email, Facebook, Twitter, news releases, and interviews with volunteers in local radio, television, and newspapers.

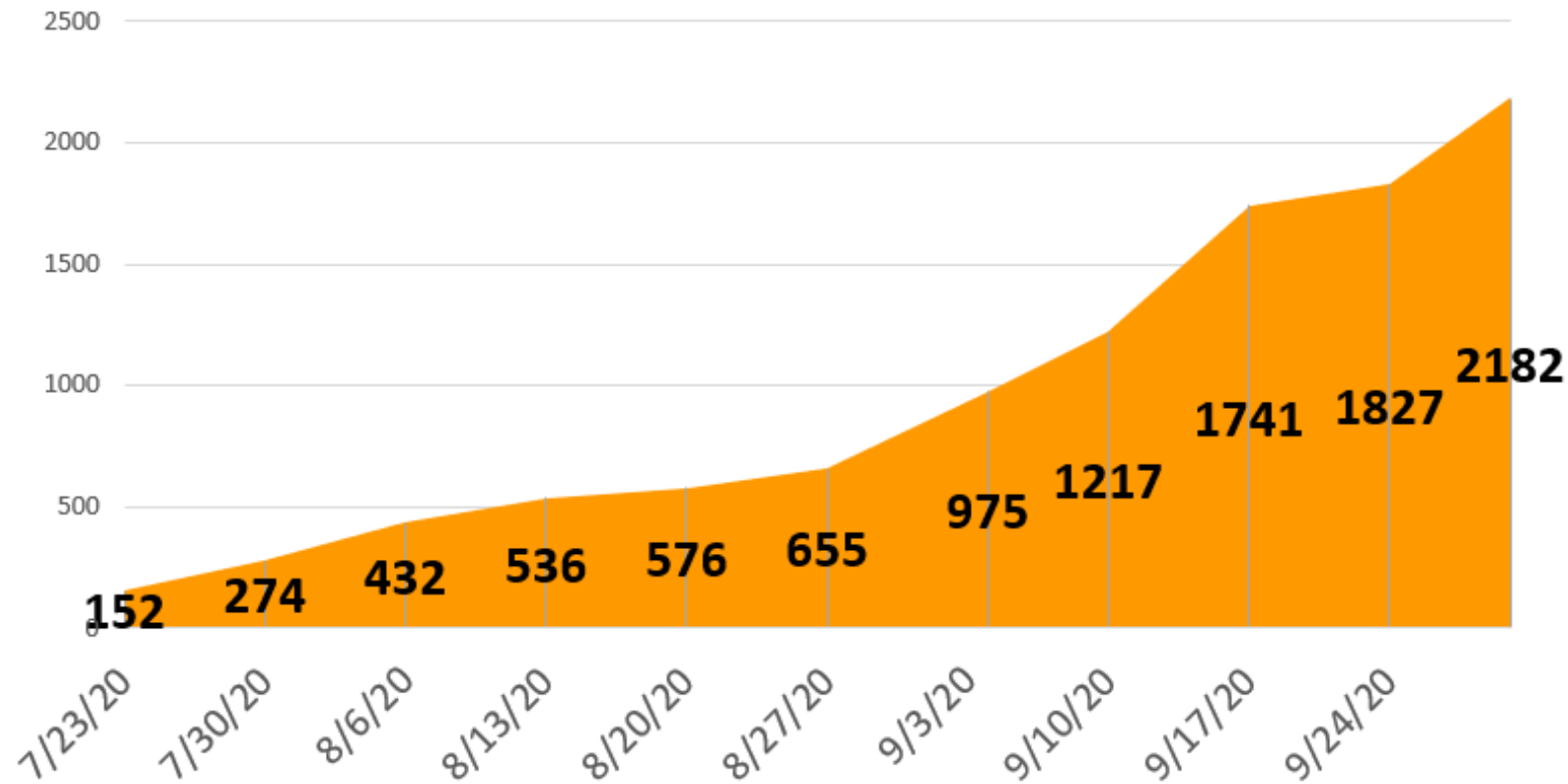
Responses

- Online only, using *Qualtrics*
- 2,182 respondents
- 1,939 complete responses
- Gender, age, geography, migration status
- Caveats: 75% of respondents were women and there were no population weights, online access bias

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2020 Alumni & Resident Survey Response Rate

2,182 Total Responses Over 11 weeks from July 17-September 30, 2020

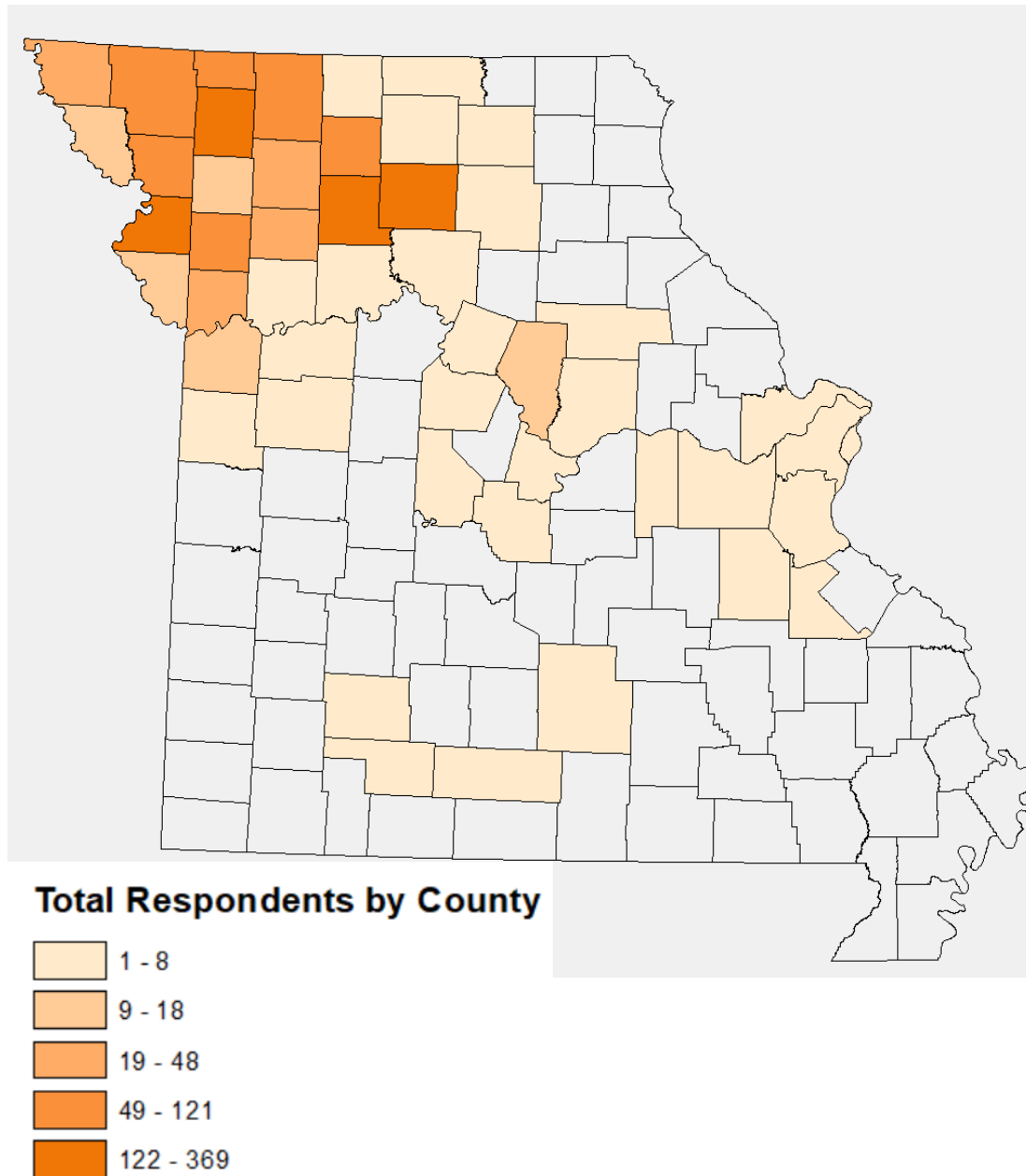


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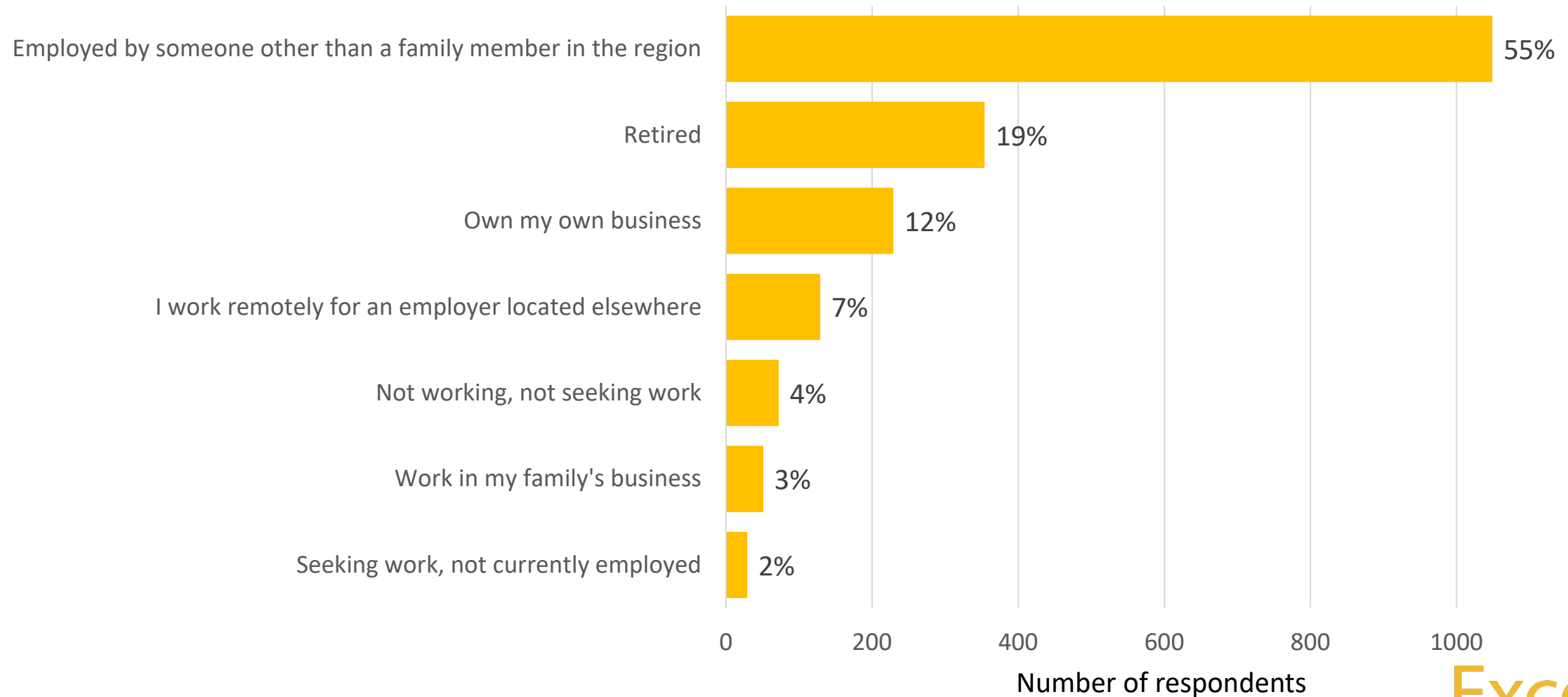
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Who responded?

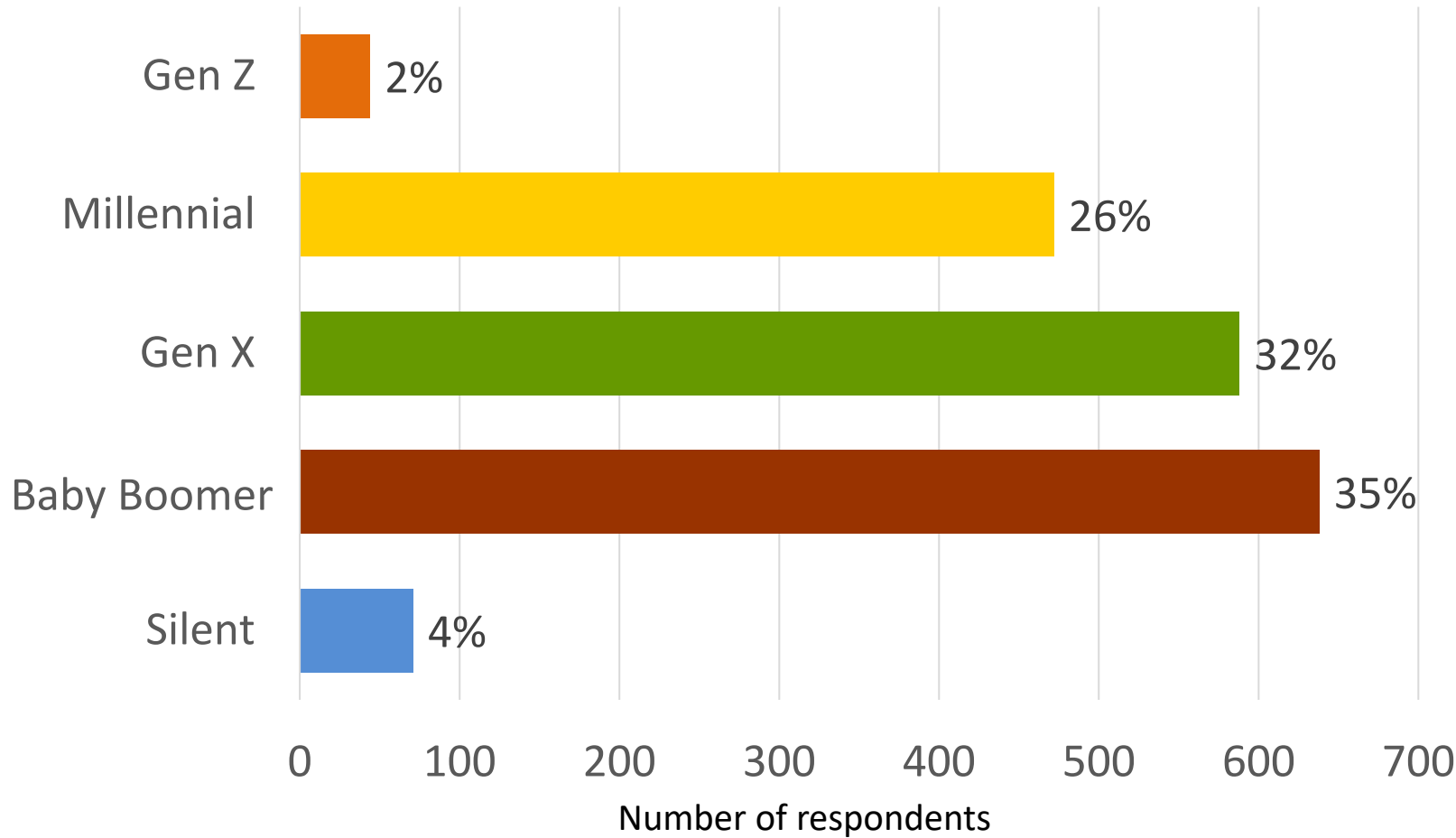
- 75% Women
- 9% of respondents live by themselves
- 37% live in households with children
- 4% of all respondents currently live in another state (20 states total)
- Counties with the most respondents: Linn, Buchanan, Gentry, and Livingston



A wide range of views were captured, including by employment status: 12% of respondents own a business



A wide variety of ages responded



Millennial and Baby Boomer respondents' views may be most important as they are more likely to move back.

Gen Z age 25 years and younger, Millennial age 26-40, Gen X age 41-55, Baby Boomer age 56-74, Silent age 75 years and older.

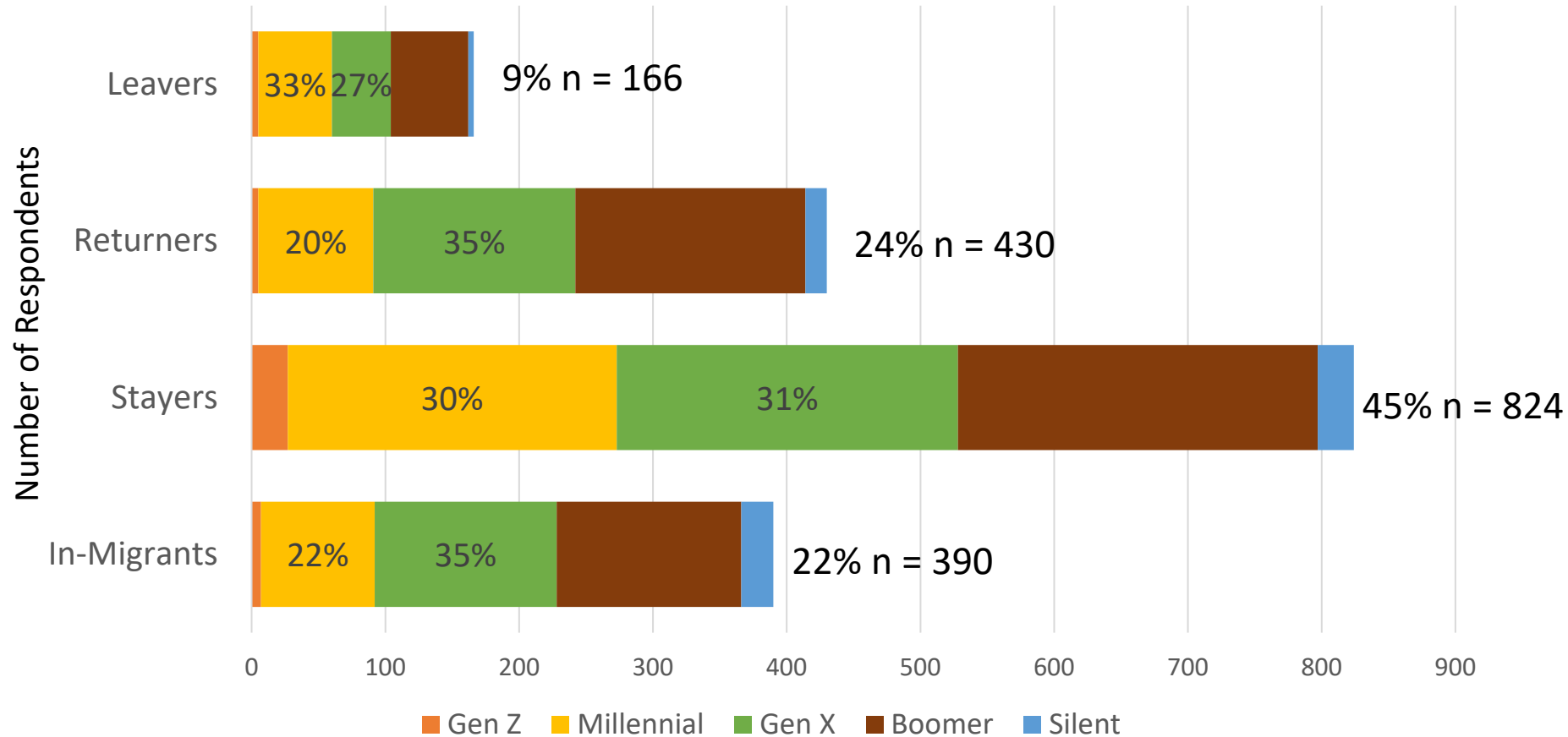
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We analyze respondents by their migration status

We used survey questions to create these groups:

- Leavers: respondents who grew up in NWMO but no longer live there
- Returners: respondents who grew up in NWMO, moved away, and have since moved back
- Stayers: respondents who grew up and have always lived in NWMO
- In-Migrants: respondents who did not grow up in NWMO but currently live in the region

Robust responses by age and migration status



This is a very robust set of responses that allow us to have confidence in examining differences between age and migration status.

Leavers: grew up in NWMO but no longer live there; Returners: Grew up, moved away, moved back; Stayers: Grew up and have always lived in NWMO; In-Migrants: did not grow up in NWMO but currently live there.

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The Best Things about NWMO

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Respondents value NWMO for the relationships they have with family and friends, low cost of living, size of town, safety, community pride and sense of belonging.

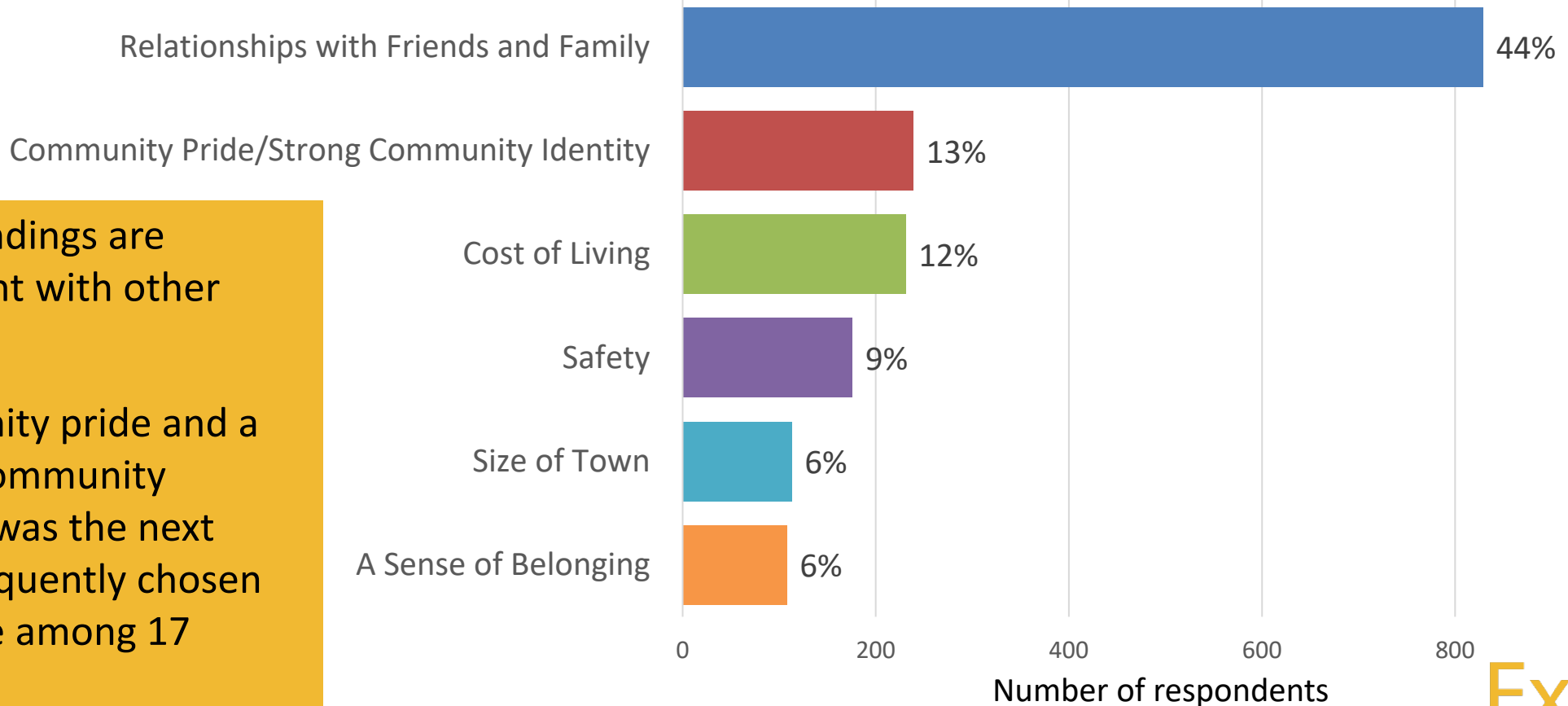
What do/did you value about the place you experience(ed) in Northwest Missouri?	%	Count
Relationships with friends and family	14%	1,815
Cost of living	12%	1,554
Size of town	10%	1,399
Safety	10%	1,376
Community pride/ Strong community identity	9%	1,230
A sense of belonging	8%	1,099
Scenic beauty (natural and architectural)	7%	945
Distance to urban areas	5%	699
Access to food sources (restaurants, grocery stores, processors, farms)	5%	637
Educational opportunities for myself and those I care about	4%	531
Access to essential stores	3%	454
Recreation opportunities	3%	434
Healthcare	3%	403
Housing availability	2%	331
Job opportunities for talented workers	2%	230
Access to arts and cultural activities	2%	212
Other:	0%	65
Total	100%	13,414

Note: Respondents were able to select multiple attributes

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Relationships with friends and family are the most valued characteristic about the region

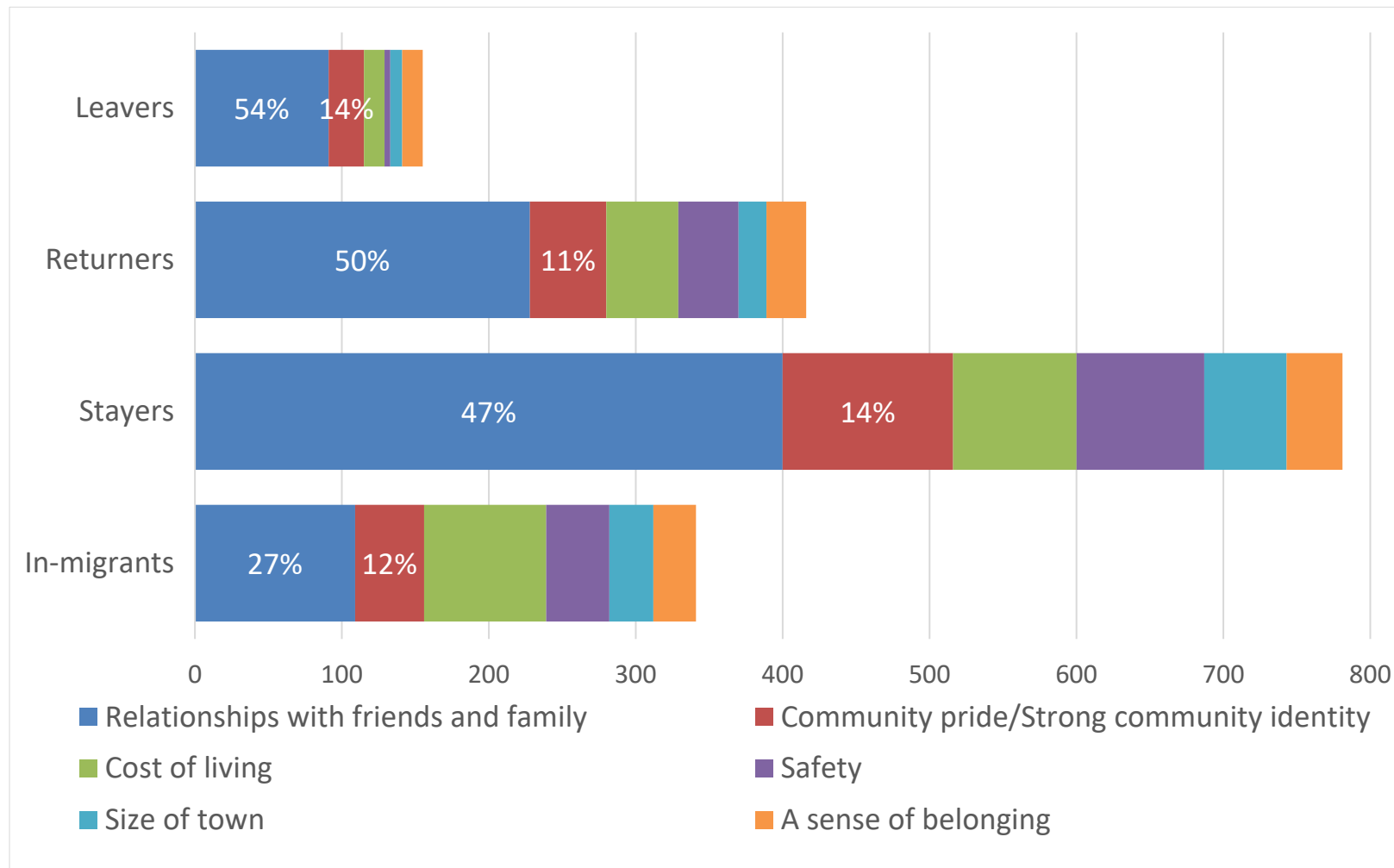
What is/was the very best thing about living and/or working in Northwest Missouri?



These findings are consistent with other studies.

Community pride and a strong community identity was the next most frequently chosen response among 17 options.

What is/was the very best thing about living and/or working in Northwest Missouri?



Relationships with friends and family was chosen by approximately half of all **leavers, returners and stayers**.

In-migrants were more likely to say cost of living than other groups.

What drives migration decisions in NWMO?

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People stay in NWMO to be near family and friends and so their children can grow up like they did

Which of the following reasons contributed to your decision to stay in the region?	%	Count
To be near family and friends	32%	855
Want my kids to grow up like I did	17%	468
Engagement in my community	10%	263
Support my spouse	9%	232
Always knew I wanted to stay	8%	229
Support a family business	6%	155
Wage and salary job opportunities	5%	144
Faith-based opportunities	3%	90
Educational opportunities	3%	87
Entrepreneurship or business ownership opportunities	3%	81
Climate and geography	2%	58
Other	1%	26
Diversity and inclusiveness of many perspectives and people	1%	14
Total	100%	2,702

Returners leave for jobs and educations, they come back to be near family and friends

Which of the following reasons contributed to your decision to leave the region?

% Count

Wage and salary job opportunities	34%	294
Educational opportunities	23%	196
Support my spouse	12%	99
Always knew I wanted to leave	7%	60
Diversity and inclusiveness of many perspectives and people	5%	46
To be near family and friends	3%	29
Climate and geography	3%	26
Provide a certain quality of life for my children	3%	23
Entrepreneurship or business ownership opportunities	2%	16
Support a family business	1%	7
Engagement in my community	1%	5
Other	7%	57
Total	100%	860

Which of the following reasons were the primary reason you moved back to the region?

% Count

To be near family and friends	58%	297
Want my kids to grow up like I did	10%	52
Job opportunities	8%	42
Support my spouse	6%	33
Always knew I wanted to come back	5%	26
Support a family business	4%	19
Entrepreneurship or business ownership opportunities	3%	13
Engagement in my community	1%	3
Total	100%	511

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In-migrants are more likely to move into the region because of a personal connection

In-migrants were drawn to move into NWMO by family connections, friendships and to support their spouse.

12% of respondents mentioned they moved into the region so that their kids could grow up like they did, suggesting they originated from a similar region.

Which of the following reasons contributed to your decision to move into the region?	%	Count
To be near family and friends	29%	514
Support my spouse	14%	243
Want my kids to grow up like I did	12%	210
Wage or salary job opportunities	12%	208
Engagement in my community	5%	87
Support a family business	4%	75
Entrepreneurship or business ownership opportunities	4%	66
Educational opportunities	3%	59
Faith-based opportunities	3%	50
Climate and geography	2%	44
Other:	6%	104
Total	100%	1,775

Respondents who no longer live in NWMO were most likely to leave for jobs and educational opportunities

This is consistent with why returners leave as well.

People have different preferences for place, 7% of all responding leavers knew they always wanted to leave.

Which of the following reasons contributed to your decision to leave the region?	%	Count
Wage or salary job opportunities	33%	137
Educational opportunities	18%	75
Support my spouse's career	11%	48
Diversity and inclusiveness of many perspectives and people	10%	40
Always knew I wanted to leave	7%	30
Provide a certain quality of life for my children	6%	26
To be near family and friends	5%	19
Entrepreneurship or business ownership opportunities	2%	9
Climate and geography	2%	9
Faith-based opportunities	1%	4
Support a family business	0%	2
I wanted to be more engaged in community leadership	0%	1
Other:	5%	20
Total	100%	420

What will influence where
survey respondents move in
the next five years?

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Nearly 1 in 4 respondents may choose to move

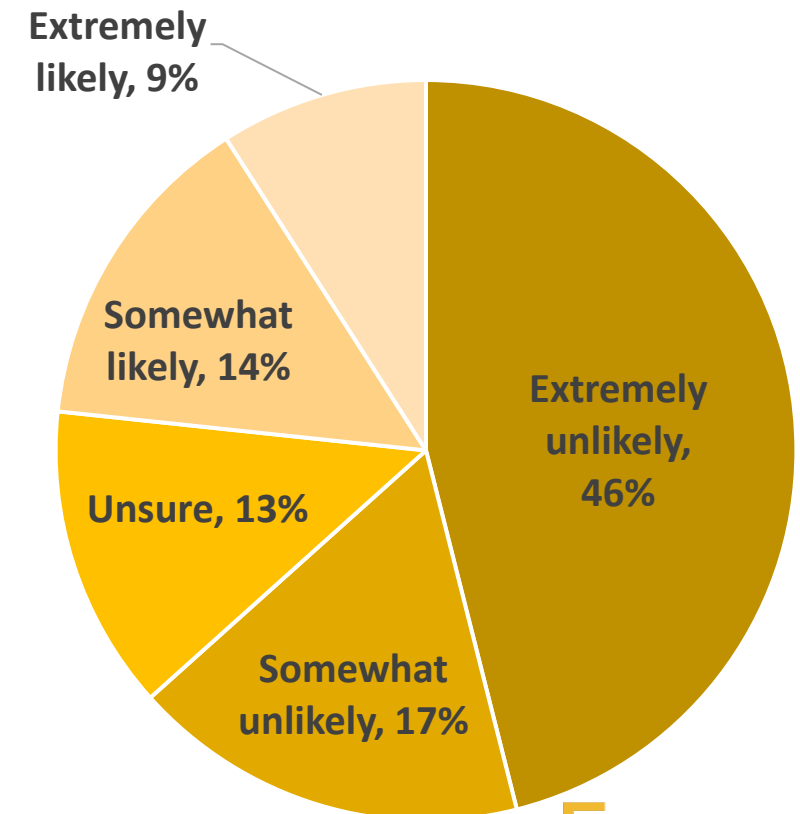
Returners were the least likely to say they will move

- 67% of all returners said they were somewhat or extremely unlikely to move
- 63% of all stayers said they were somewhat or extremely unlikely to move

Leavers were most likely to say they will move again.

- 42% of leavers said they were somewhat or extremely likely to move.

How likely are you to move in the next five years?



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How important are each of the following factors in your decision about where you will live in the next 5 years?

Most frequently ranked as very important factors:

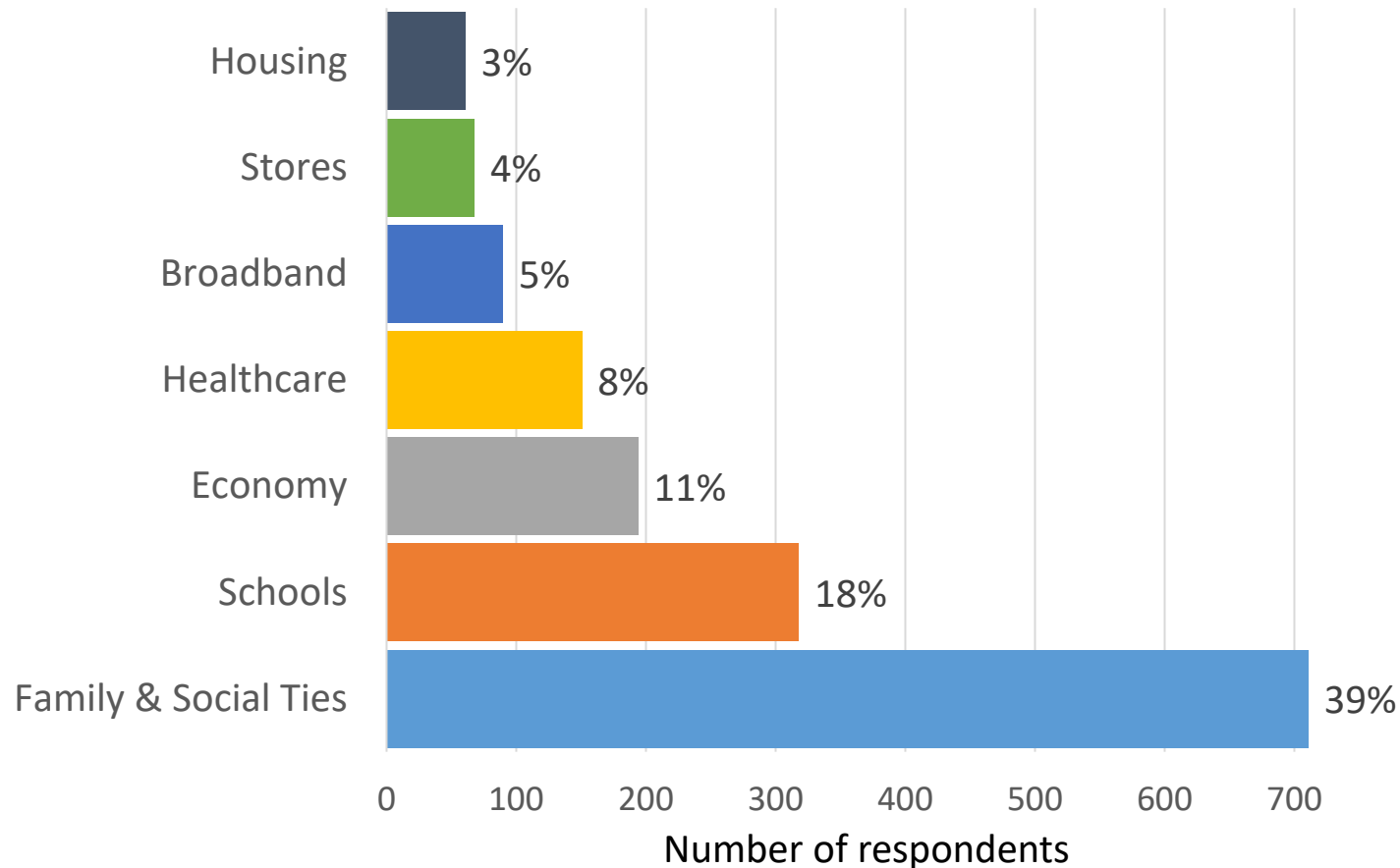
- Ties to the area
- Health care
- Access to a hardware, grocery and other stores
- Broadband
- Quality k-12 schools
- Growing economy

Factor	Not important	Somewhat important	Very important	Total
Ties to area	9%	30%	61%	2062
Health care	6%	32%	62%	2056
Access to a hardware, grocery, and other stores	9%	37%	54%	2056
Broadband or high-speed internet	11%	34%	55%	2048
Quality of local K-12 schools	17%	21%	62%	2043
Strong or growing local economy	7%	36%	57%	2042
Easy commute	19%	40%	42%	2048
Access to fresh produce	14%	45%	40%	2048
Climate and geography	25%	57%	18%	2048
Scenic beauty (e.g., natural or architectural)	18%	56%	26%	2052
Outdoor recreation	24%	52%	24%	2053
Access to a local lawyer, accountant and other professional services	32%	49%	19%	2045
Available housing	23%	39%	38%	2039
Arts and entertainment	41%	47%	13%	2039
Access to a coffee shop/bakery	57%	32%	12%	2034
Other:	46%	20%	34%	345

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Family ties are important in making migration choices

Most important factor in your decision about where you will live in the next 5 years

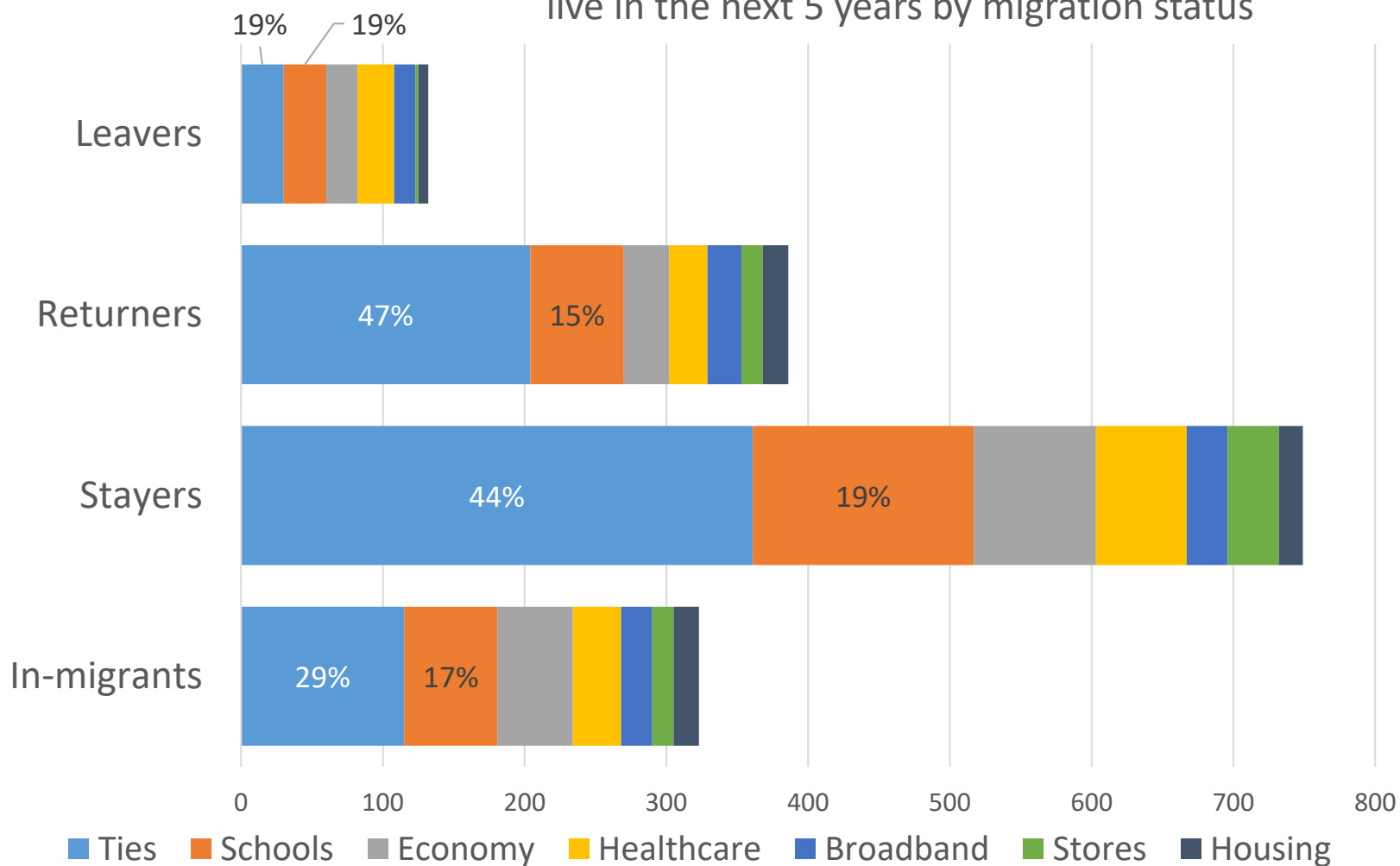


When asked to identify the most important factor in their decision about where they will live in the next 5 years, respondents chose “Family and social ties” the most, and twice as often as the following factor, schools.

Regional development efforts can support families and intentionally help in-migrants build social connections within organizations.

Targeted investments can help build desirable communities

Most important factor in your decision about where you will live in the next 5 years by migration status



Leavers most important factor (N=161)

Ties	19%
Schools	19%
Healthcare	16%
Economy	14%
Broadband	9%
Climate and geography	6%
Housing	4%
Arts	4%
Other	3%
Recreation	2%
Stores	1%
Commute	1%
Access to fresh produce	1%
Professional services	1%

No matter where they currently live, people likely to move again value similar place characteristics

People who still live in the region (n = 141)

Top 5 Most Important Factors in your decision about where you will live in the next 5 years

1. Access to fresh produce
2. Coffee shops & bakeries
3. Access to professional services
4. Arts & Entertainment
5. Ties to the area

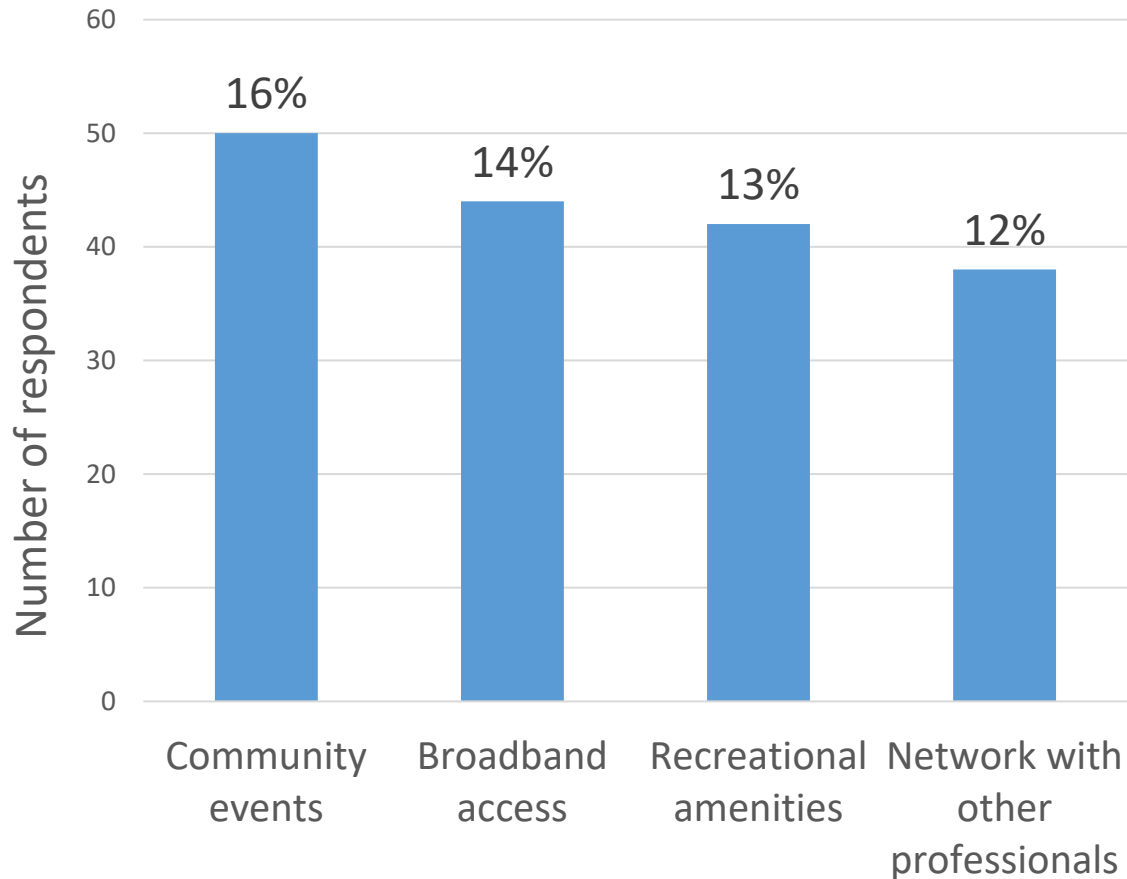
People who live outside the region (n=32)

Top 5 Most Important Factors in your decision about where you will live in the next 5 years

1. Access to fresh produce
2. Coffee shops & bakeries
3. Ties to the area
4. Access to professional services
5. Arts & Entertainment

Ties to the area were still important to both groups, but they are more likely to value access to fresh produce, coffee shops and bakeries. Having a local lawyer, accountant and other professional services is also important. Coordinated development efforts can address these preferences.

Which of the following opportunities would make it easier for you to move back?



People who have left indicate more interaction personally and professionally as well as broadband and recreational amenities would make it easier for them to move back.

- N=179, 420 total responses.
 - 10% of all responses indicated no changes would make it easier

Respondents value easy commuting and salary growth opportunities as they assess job opportunities

This suggests that the region could highlight distances to larger urban areas and available infrastructure.

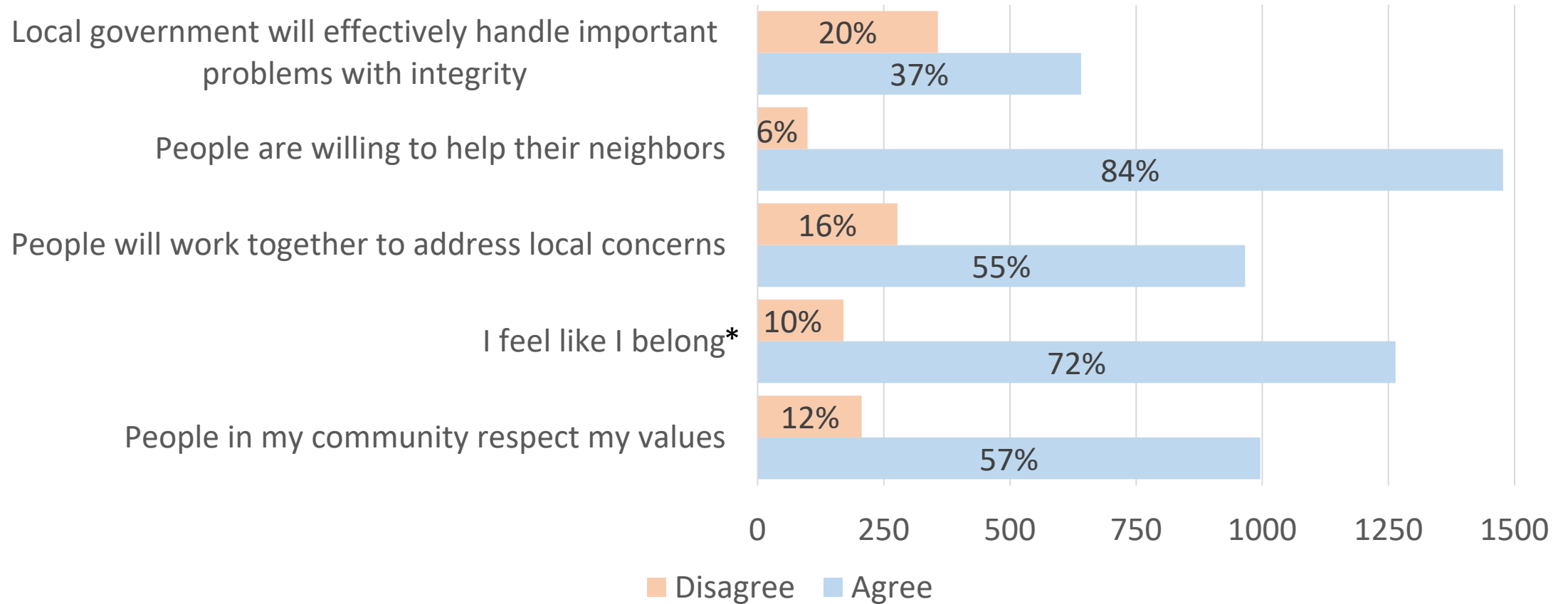
Which of the following characteristics about where you work are important to you?	%	Count
Easy commuting	20%	1067
Salary growth	17%	921
An area with a low cost of living	15%	782
Flexible hours that allow me to work when I want to work	12%	659
Professional advancement opportunities	12%	620
Shifting my schedule to be able to pick up my children from school	9%	487
Flexibility regarding location of workspace so I can work remotely	9%	456
Owning my own business/being my own boss	7%	365
Total	100%	5,357

How can Maximize NWMO
strengthen the region?

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People have a variety of perspectives on strengthening the region

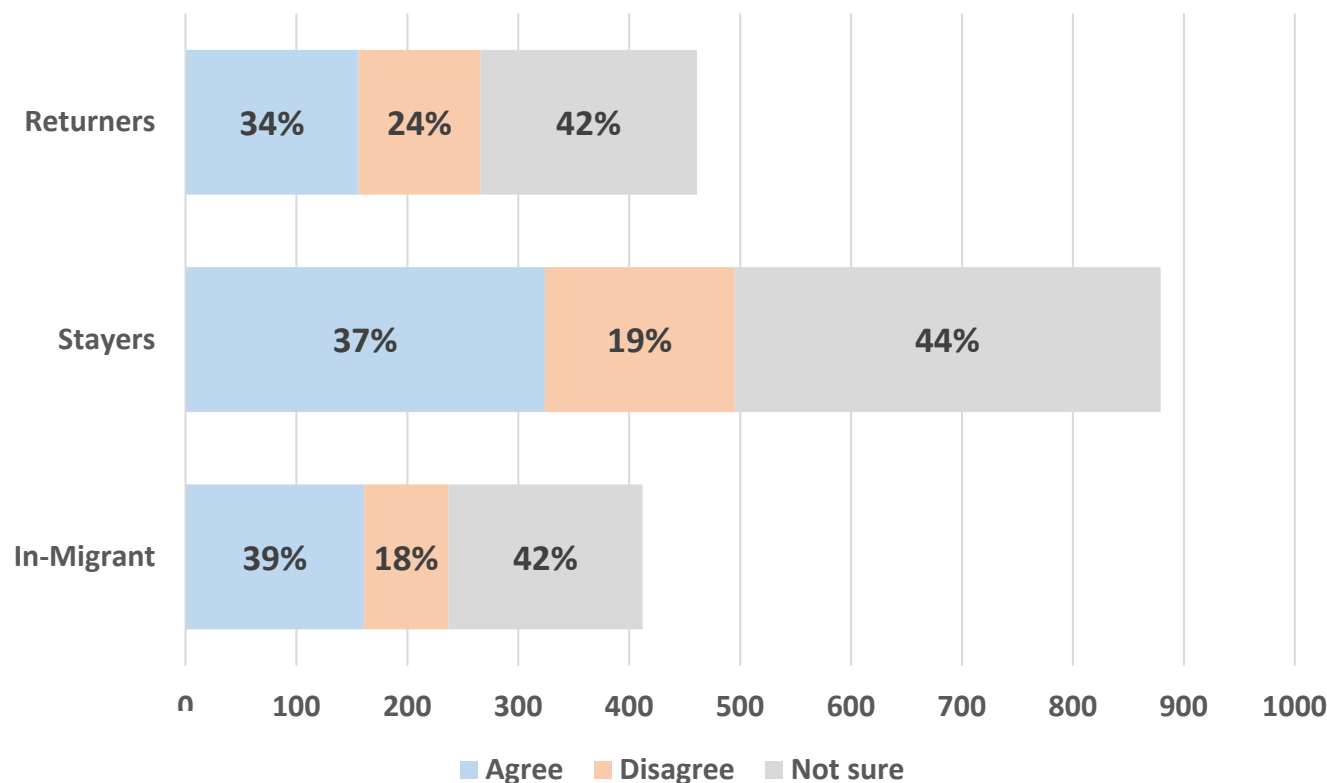


*There were not strong differences among the views of stayers, returners and in-migrants except for "I feel like I belong."

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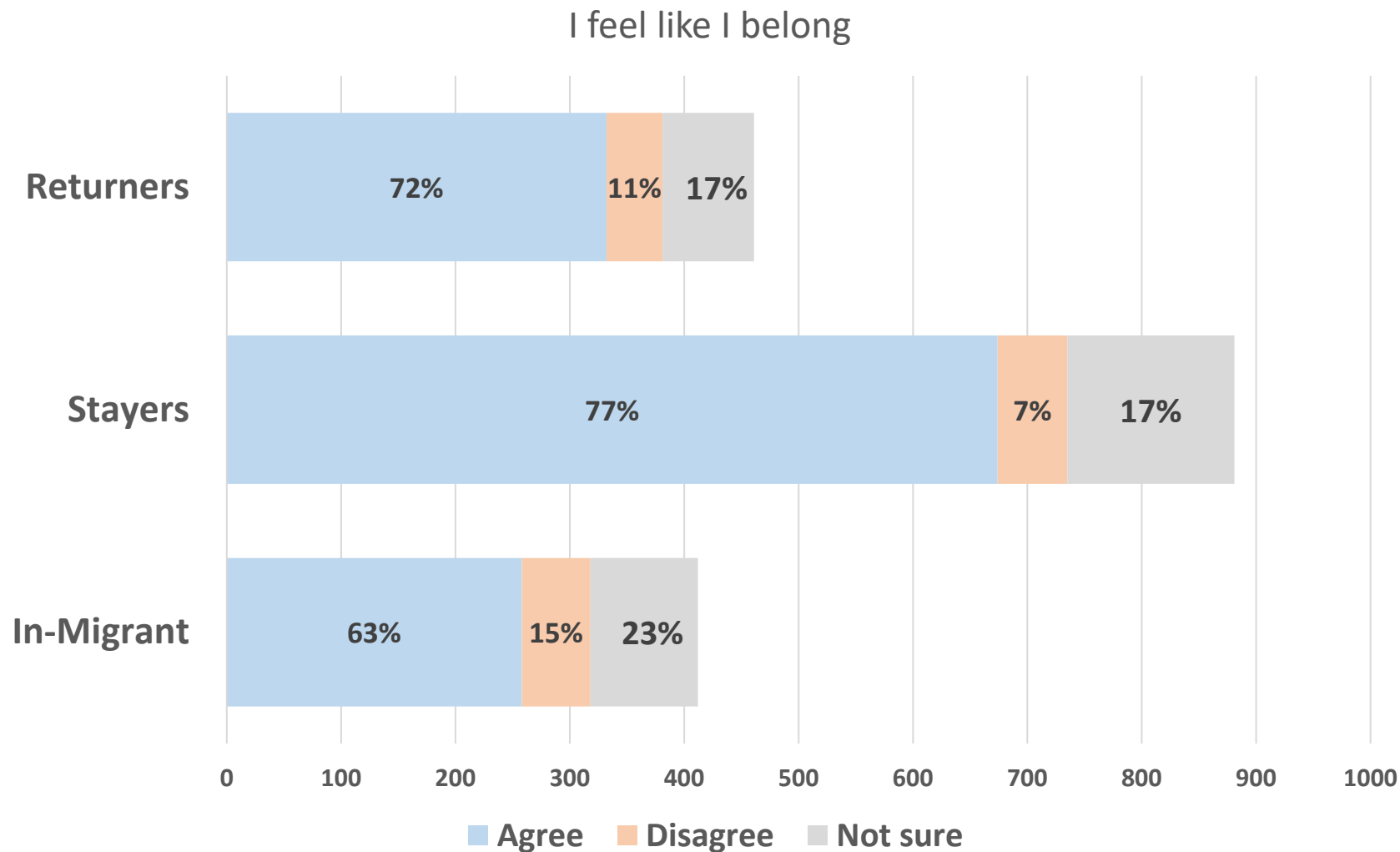
Concerns about local government

Local government will effectively handle important problems with integrity



Overall, respondents were least likely to agree that the local government will handle important problems with integrity – views did not differ by migration status.

In-migrants were less likely to feel they belong



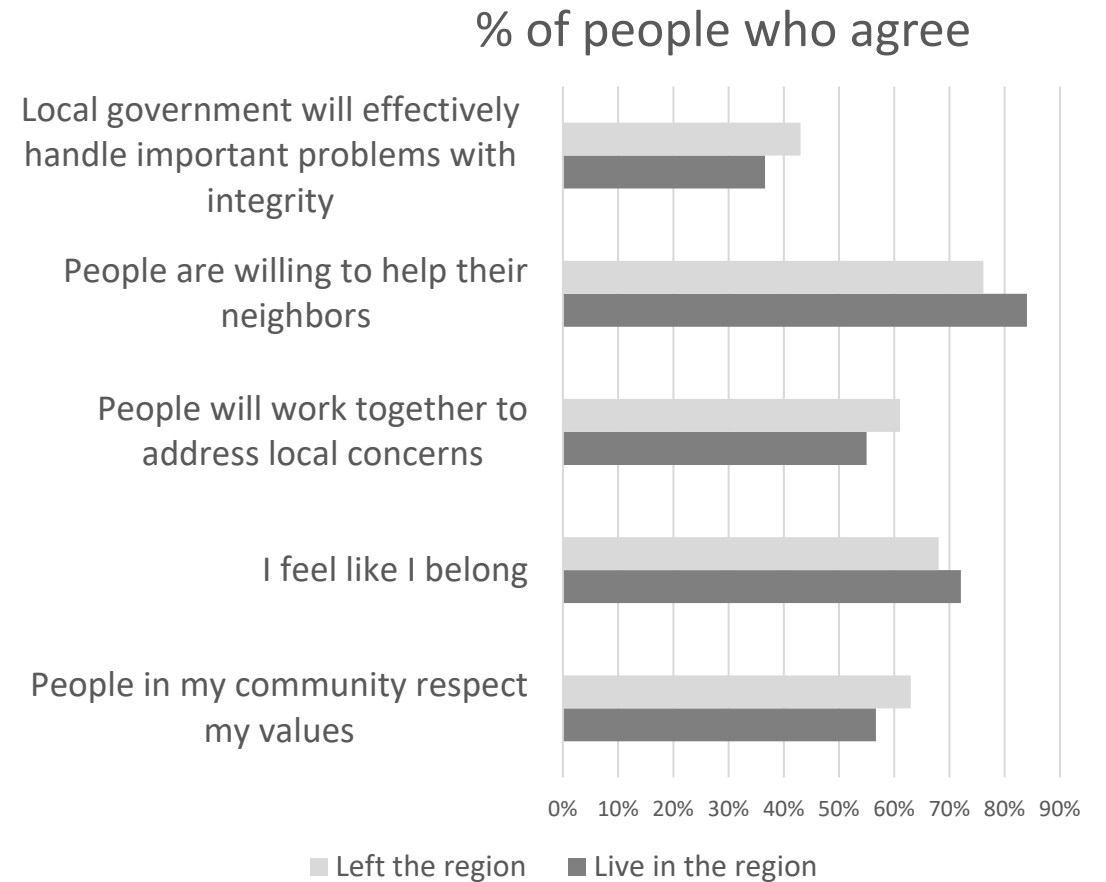
“We'd like to feel we belong, but after 17 years we still don't really feel like we're accepted and members of the community.”

Leavers had positive attitudes about their current communities

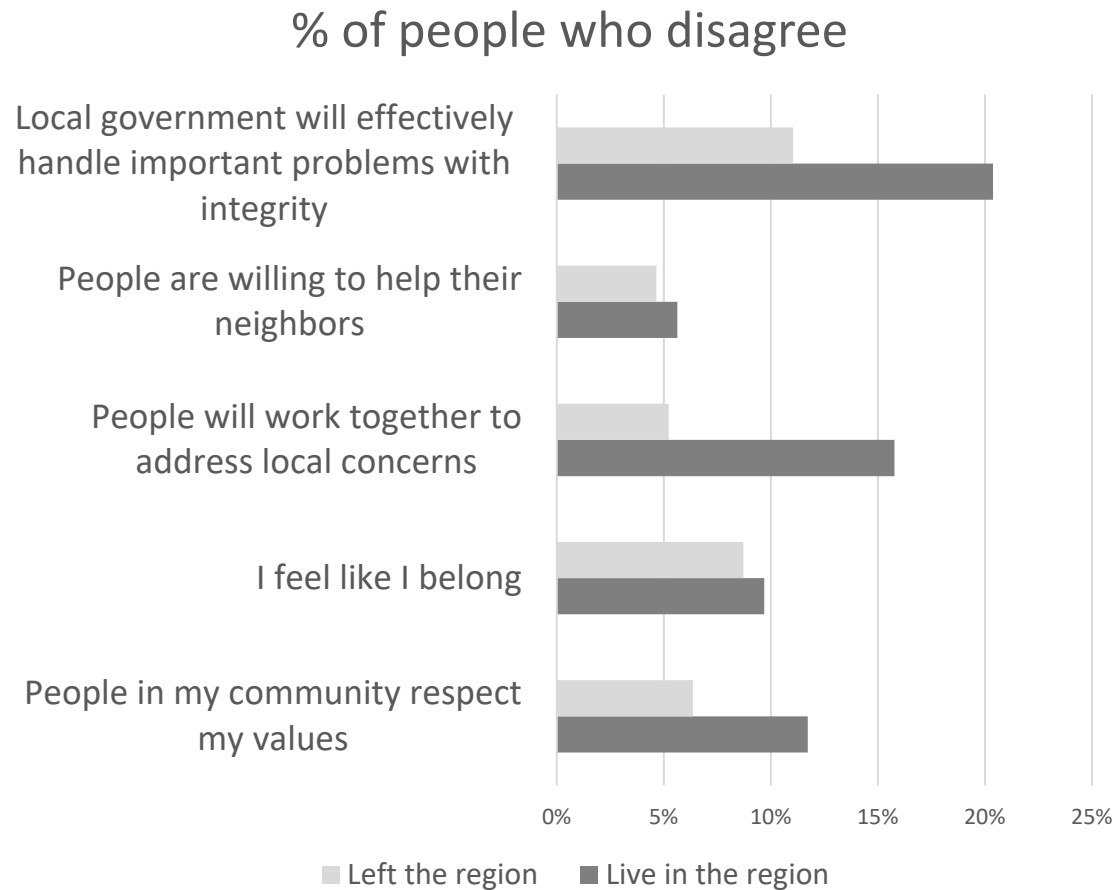
People who left the region feel favorable about their current communities.

Compared to people who live in NWMO,

- Leavers were nearly as likely to say they feel like they belong
- Leavers were more likely to say local govt. handles problems with integrity; people respect their values, and people work together

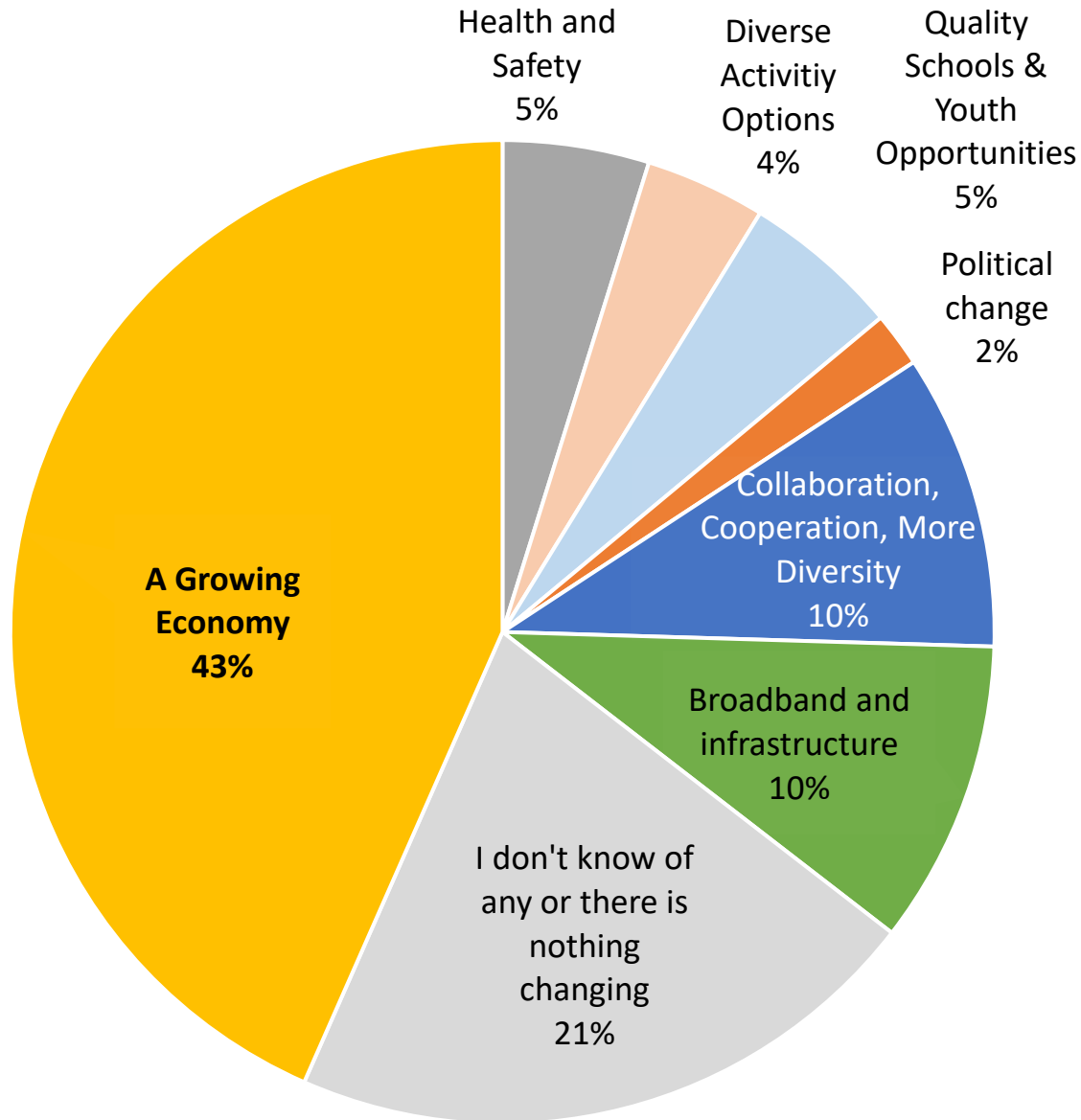


Leavers were less likely to disagree with these community perceptions



A smaller percentage of leavers disagree with all five statements about current community perceptions.

- Leavers were far less likely to feel like people will not work together than people who live in NWMO
- Leavers agreed more with these community perceptions
- The region may be able to improve on local perceptions, but we have limited comparisons to other places to draw upon



What changes are you most excited about for the future of Northwest Missouri?

- Respondents often wrote about their aspirations for how they want to see the region change. These individuals want to see the region's economy grow, better broadband, and more collaboration within their communities.
- The second most common response was a mixture of people who felt like the region was not changing or they were unaware of any exciting changes happening.

This was an open-ended write in response that generated 1,088 responses, these were grouped into eight categories.

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What excites you about the future of NWMO?

Growing economy

- Young adults considering business opportunities and entrepreneurial opportunities in rural areas
- Downtown revitalization
- Local employment opportunities, local recreational options, local lodging(cabins, B and B), local community center
- The growth potential - more families, more businesses, more pride in each city
- I would like to see it grow and be more accepting to new businesses. I would like to see more activities for parents and children to partake in.

Broadband and Infrastructure

- Increasing ability to telecommute might allow us to keep talented individuals in the community
- Maintain & Upgrading Road & Bridges in Northwest Missouri
- The additional sidewalks are nice. And the new shops and restaurants are great too.

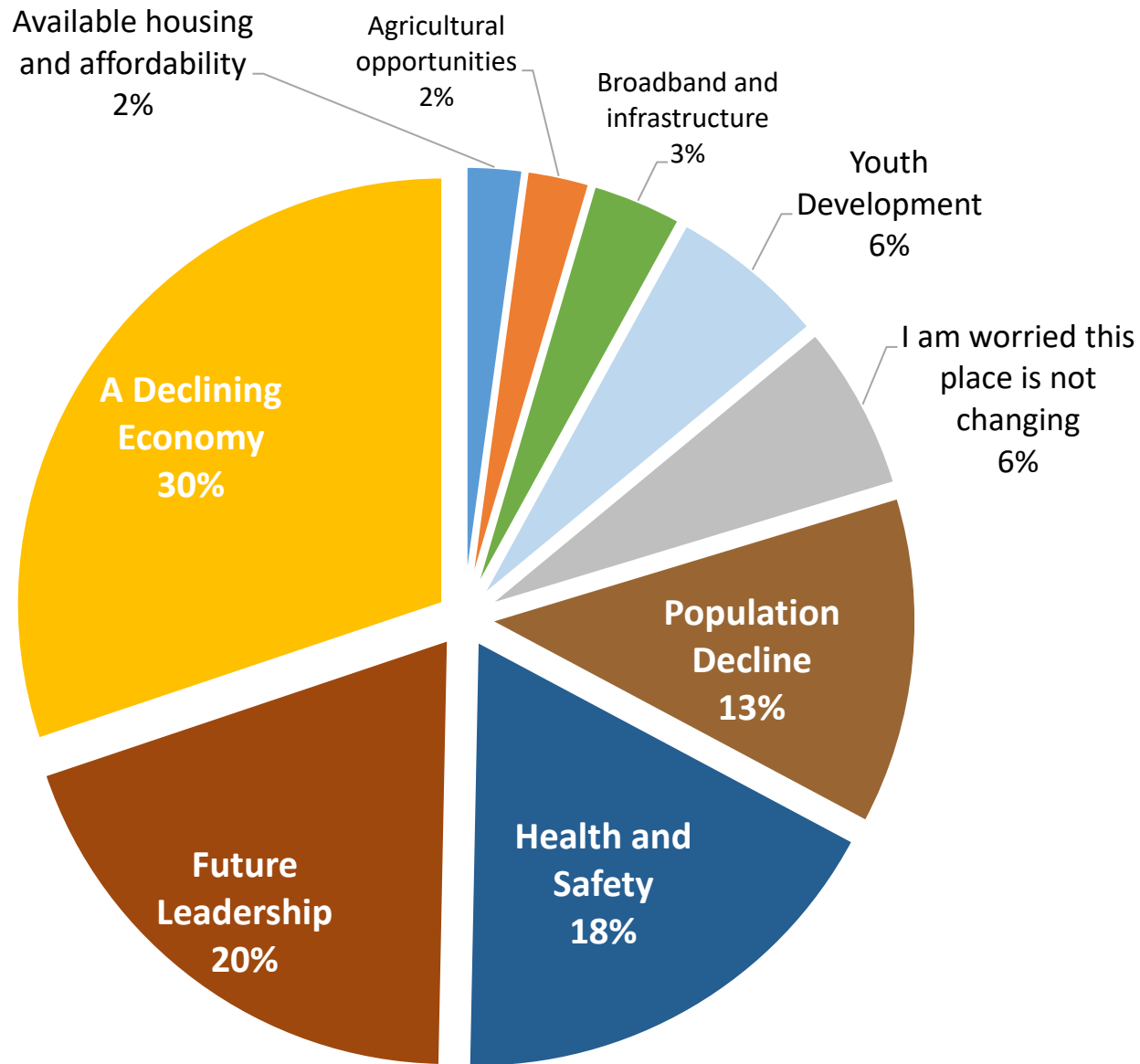
Collaboration, Cooperation, More Diversity

- I think the younger generations are stepping up and we may see more progressive communities
- New leadership means new opportunities for our town
- Attracting new people with new ideas to our communities
- Seeing communities around the area start to show they care about their appearance and friendlier attitudes towards more people. It seems like some communities are starting to understand that same people can't run things the same way forever or they'll just keep pushing new residents and younger people away.
- Residents of the region embracing similar and like projects and visions. Pride and togetherness

Selected write-in responses from the 1,088 provided.

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What changes worry you the most about the future of Northwest Missouri?



- Respondents were mostly worried about the future of the NWMO economy, and they were concerned about national and local political strife and leadership changes.
- The quality of local health care resources, COVID recovery, crime rates and population decline were the next most commonly voiced concerns.

This was an open-ended write in response that generated 1,236 responses, these were grouped into nine categories.

What concerns you about the future of NWMO?

A declining economy

- Lack of well paying jobs, poverty, not enough jobs for professionals
- Closing of multiple long-term businesses and more restrictive business hours for community center and stores
- Businesses inability to find qualified workers
- Business closures

Declining health and safety

- Broad concern about the availability of health care providers

Youth Development

- Lack of school funding
- Quality of local schools
- Less and less for our children to do. If not involved in sports then nothing much available.

Selected write-in responses from the 1,236 provided.

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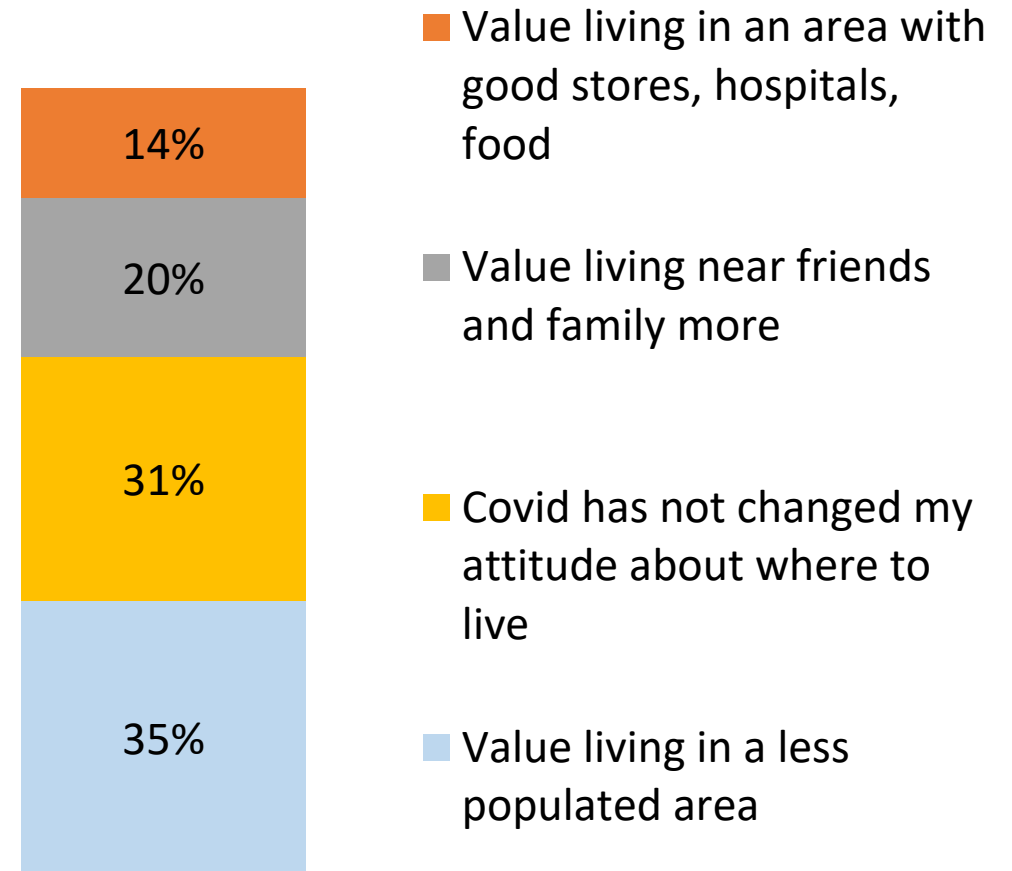
COVID-19 and Migration Attitudes

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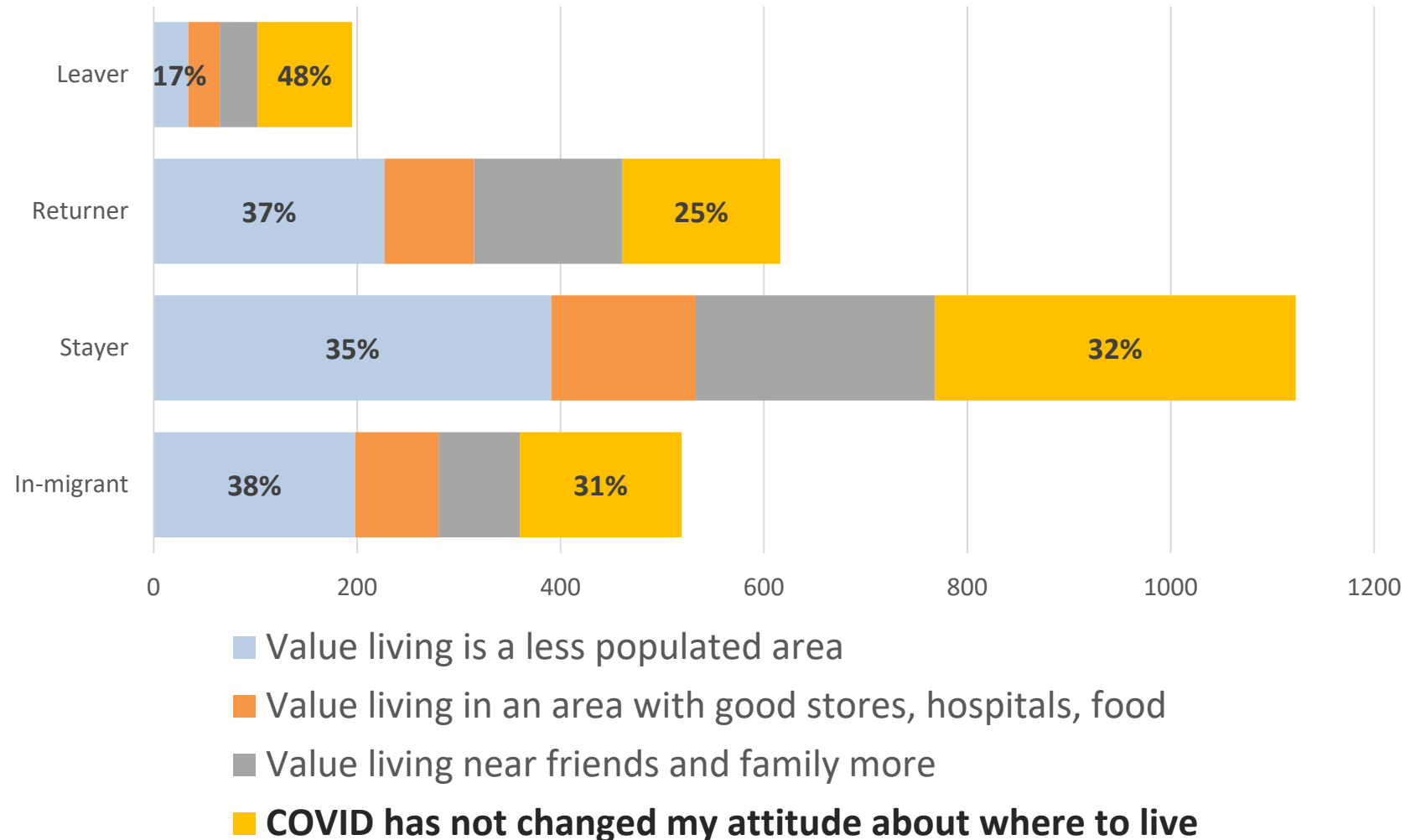
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Has the COVID-19 pandemic changed your attitude about where you want to live?

35% of respondents said COVID-19 has made them value living in a less populated area more than before



Has the COVID-19 pandemic changed your attitude about where you want to live?



Regarding COVID-19 has **not changed** my attitude about where to live

Holding all else constant (i.e., gender, occupation-type, household composition, generation, metro-location and survey month are held constant in a multivariate regression), we find:

- Leavers were **18% more likely** to say **not changed** than stayers
- Returners were **7% less likely** to say not changed than stayers
- Stayers and In-migrants are no different from each other

Regarding COVID-19 has **not changed** my attitude about where to live

Holding all else constant, we find:

- Those aged 56 and older were **more likely** to say COVID-19 has changed their attitude about where to live
 - Gen Z members were 18% more likely to say no change than boomers or the silent generation
 - Millennials were 9% more likely to say no change than boomers or the silent generation
 - Gen X members were 8% more likely to say no change than boomers or silent generation

COVID-19 **has** changed my attitude about where to live: I **value living in a less populated area more**

44% of respondents (n=853), *holding all else equal*:

- Leavers were **30% less likely** to say this than stayers
- No difference for returners, in-migrants or stayers
- People currently located in metro areas were 7% less likely to say this than those in nonmetro areas

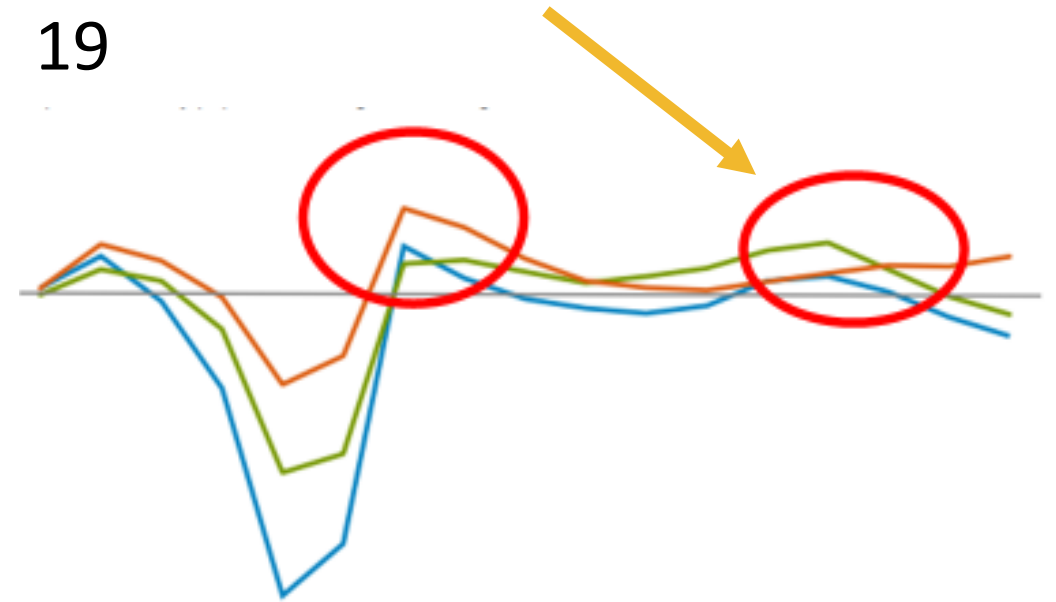
COVID has changed my attitude about where to live: I value living closer to family and friends more than I did before

26% of respondents (n=499), *holding all else equal:*

- Leavers were 9% less likely to say this than stayers
- In-migrants were 8% less likely to say this than stayers
- Returners were 5% more likely to say this than stayers
- Millennials and boomers were more likely to say this than silent generation

COVID and Migration: Carefully targeted return migration efforts are warranted

- Family and friends are important—maintain those ties and capitalize on them in recruitment
- Towns and cities in NWMO may be most attractive to potential in-migrants valuing living in a less populated area due to COVID (i.e., not too rural—is there a coffee shop, bakery and grocer?)
- Early retirees might be targeted, their migration perceptions were more impacted by COVID-19



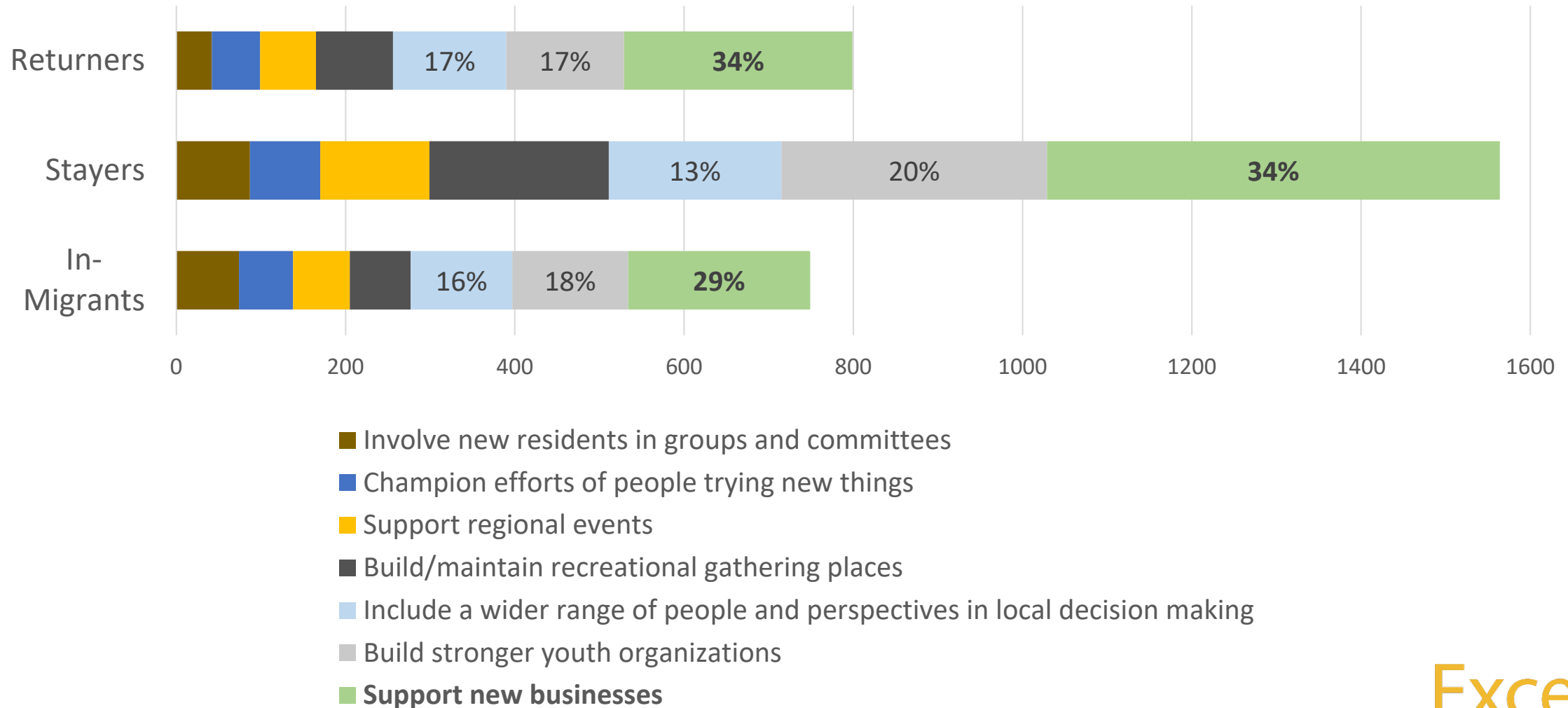
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Policy Implications

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What efforts would you support in your community? → #1, support new businesses (*jobs*)



Where can Maximize NWMO focus efforts to promote the region in ways that retain and attract residents?

Actively reach-out to newcomers (in-migrants)

- Nominate newcomers to serve on boards and in other leadership roles
- Let them get their footing for a year and then watch them contribute

Engage the business community in developing solutions

- Engage with a range of businesses, work across sectors when possible
- Collaborate with other organizations

Foster job-creating businesses and entrepreneurial opportunities

Be inclusive and foster new leaders

Where can Maximize NWMO focus efforts to promote the region in ways that retain and attract residents?

Areas like NWMO are most desirable to potential in-migrants with existing family ties to the area

- Support families and youth organizations
- More deliberately engage in-migrants and potential return-migrants

Think about what it means to be not just *family friendly* but **supportive of families**

- Engage young families in the region and talk about their needs and preferences. Prioritize reviving public spaces that are family friendly and invest in youth organizations.

Where can Maximize NWMO focus efforts to promote the region in ways that retain and attract residents?

Schools as leaders in supporting families

- School districts can engage new families before the start of the year and host schoolwide social events that help new families meet others. Encourage transfer students to join student organizations, discuss options with parents. Be inclusive.
- Develop ways to communicate with alumni after their five year high school graduation – talk about new events, community spaces, business openings, etc.

Thank You

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