



WICHITA STATE
UNIVERSITY

FAIRMOUNT COLLEGE OF
LIBERAL ARTS AND SCIENCES

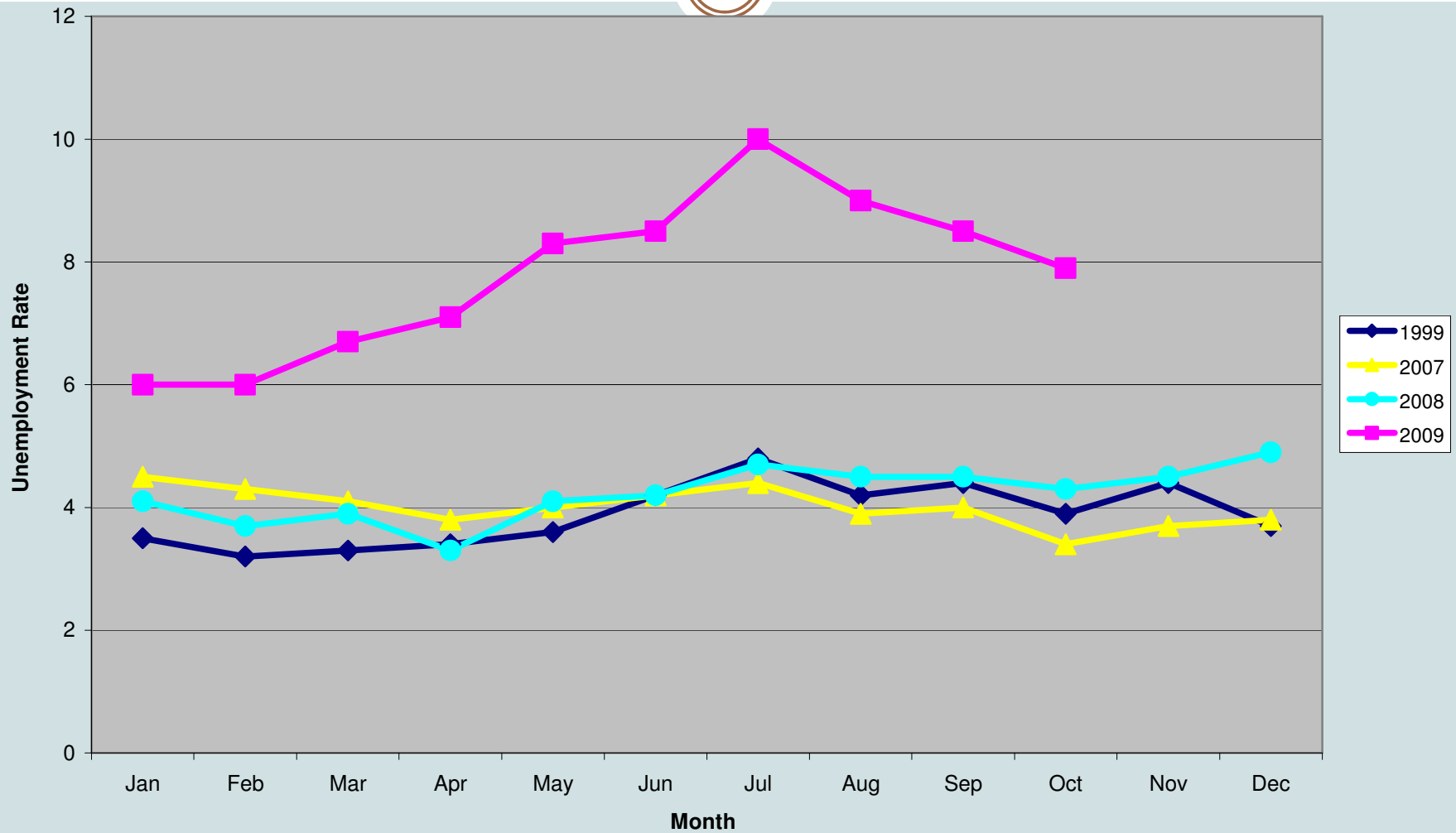
*Hugo Wall School of Urban
and Public Affairs*

The South Central Kansas Economy

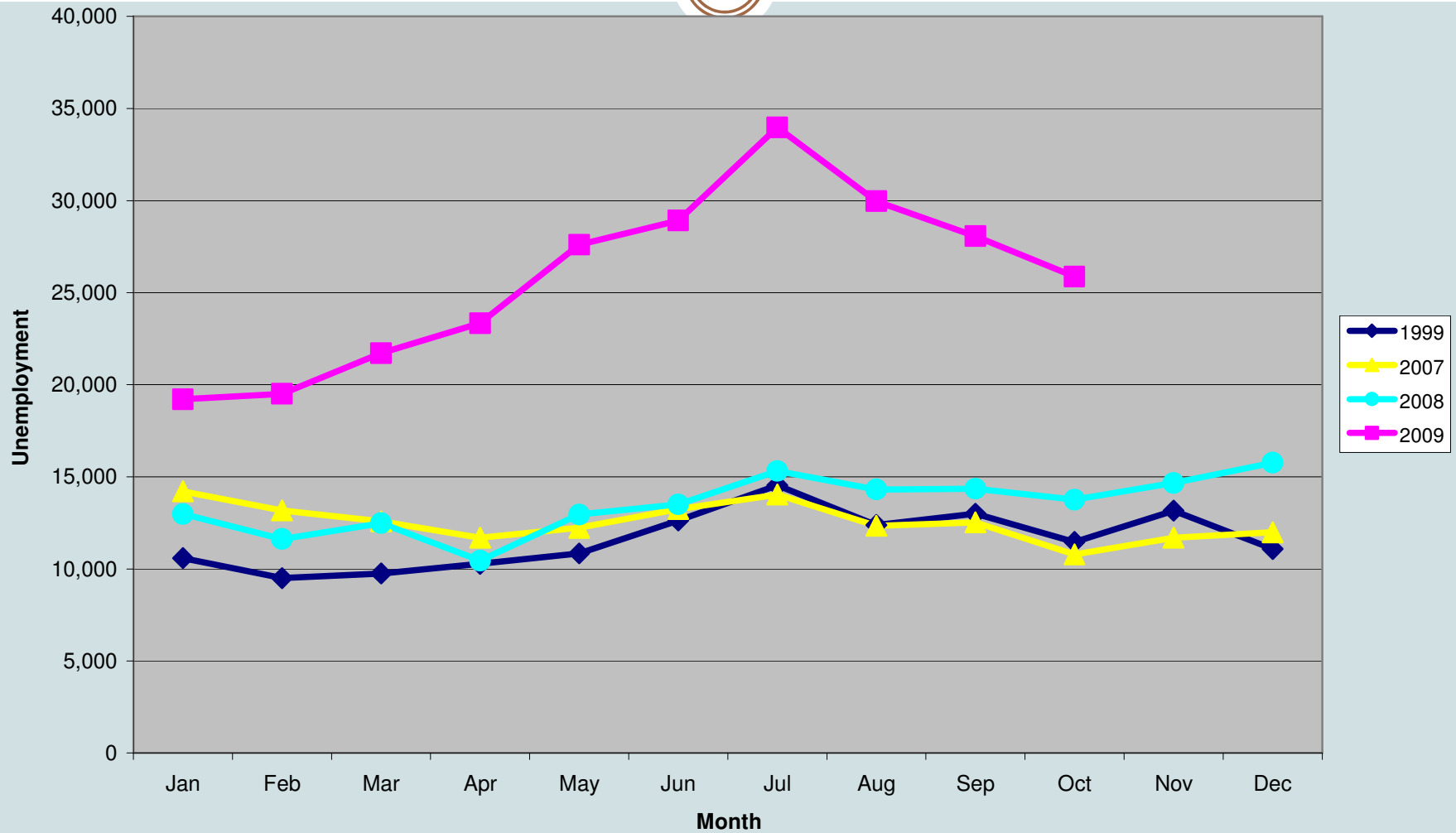


Prepared for
**The South-Central Kansas Legislative
Policy Summit**
by
John D. Wong, J.D. Ph.D.
December 3, 2009

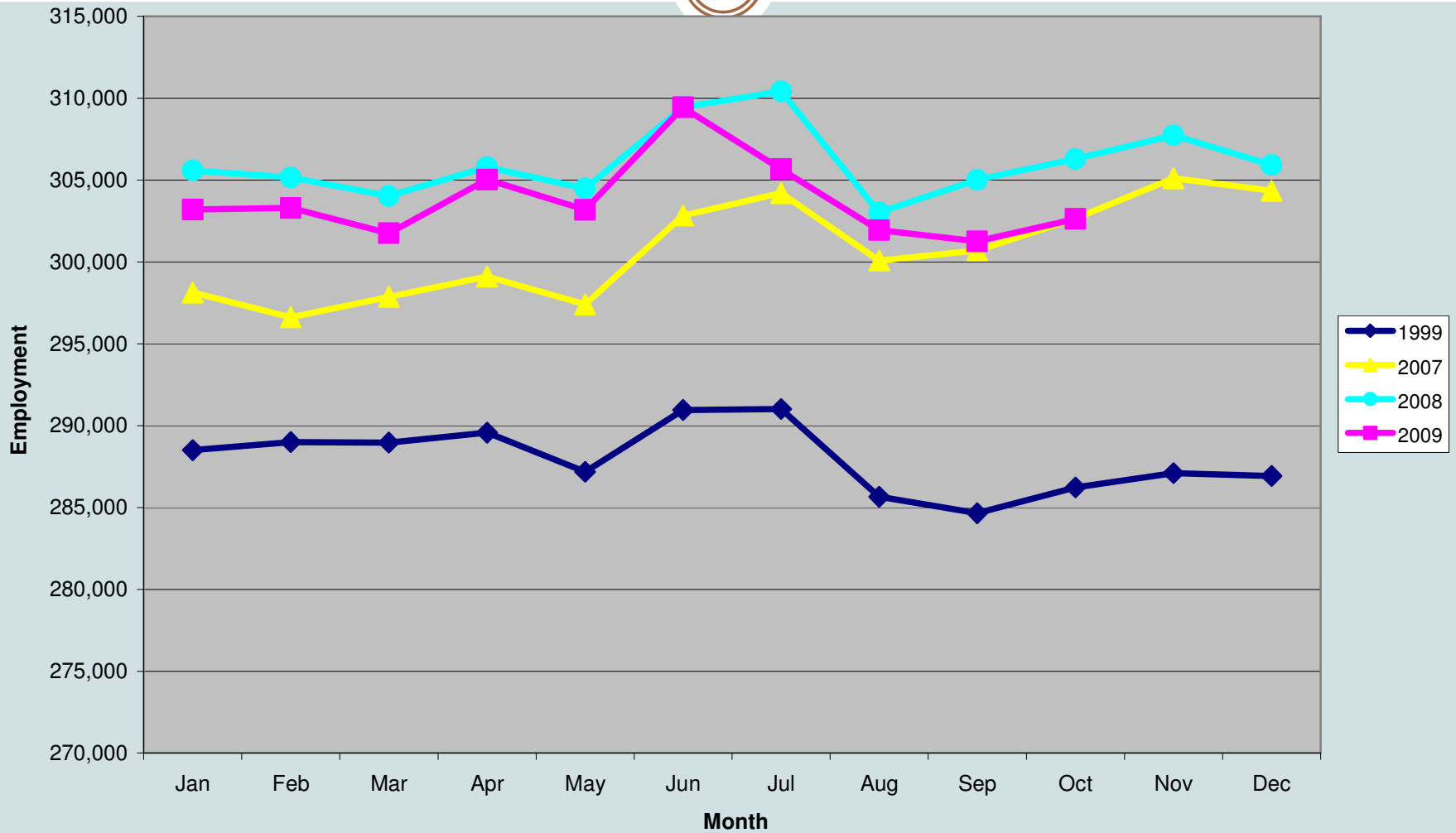
Unemployment Rate Wichita MSA



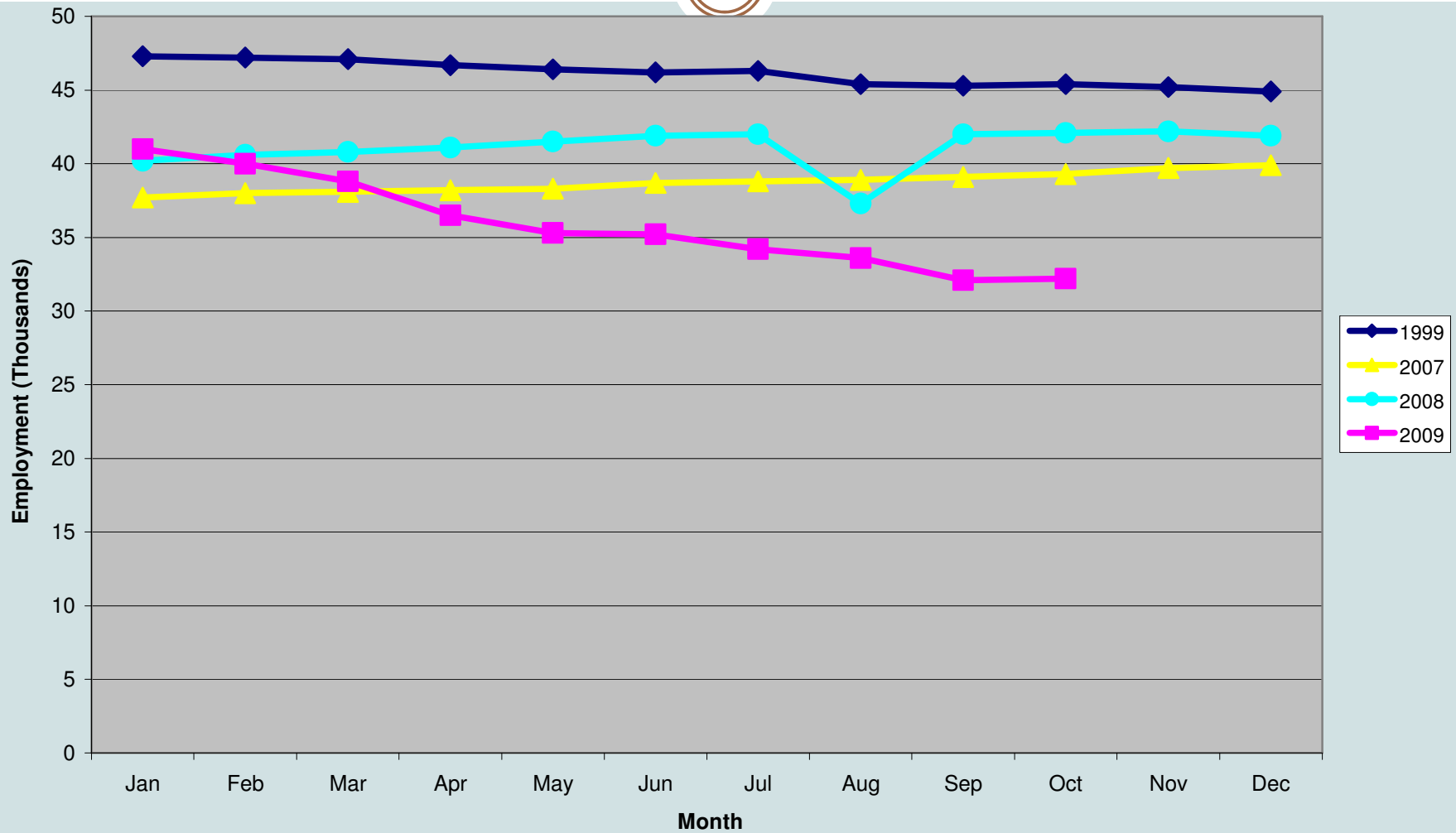
Unemployment Wichita MSA



Employment Wichita MSA

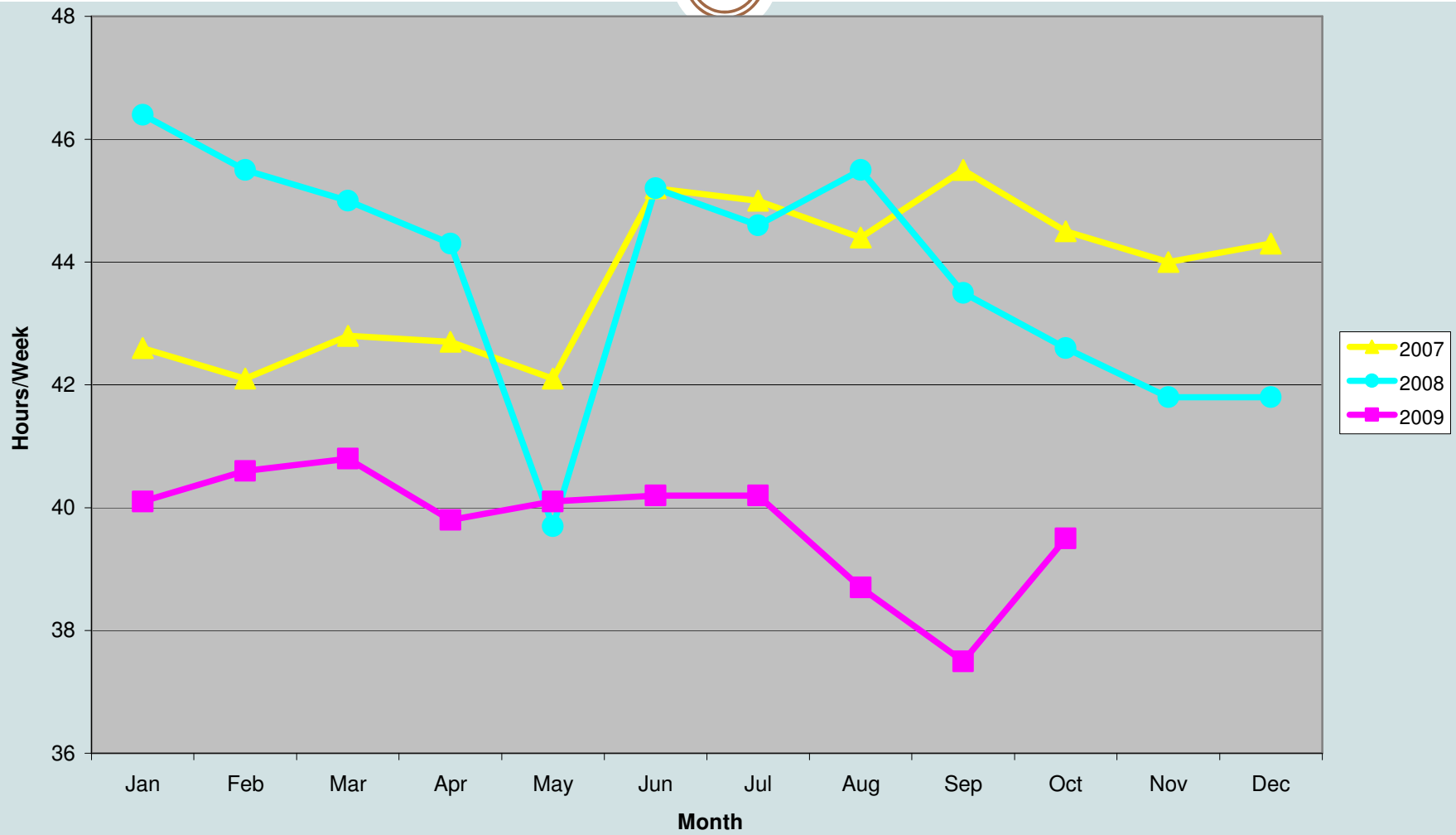


Aerospace Employment Wichita MSA



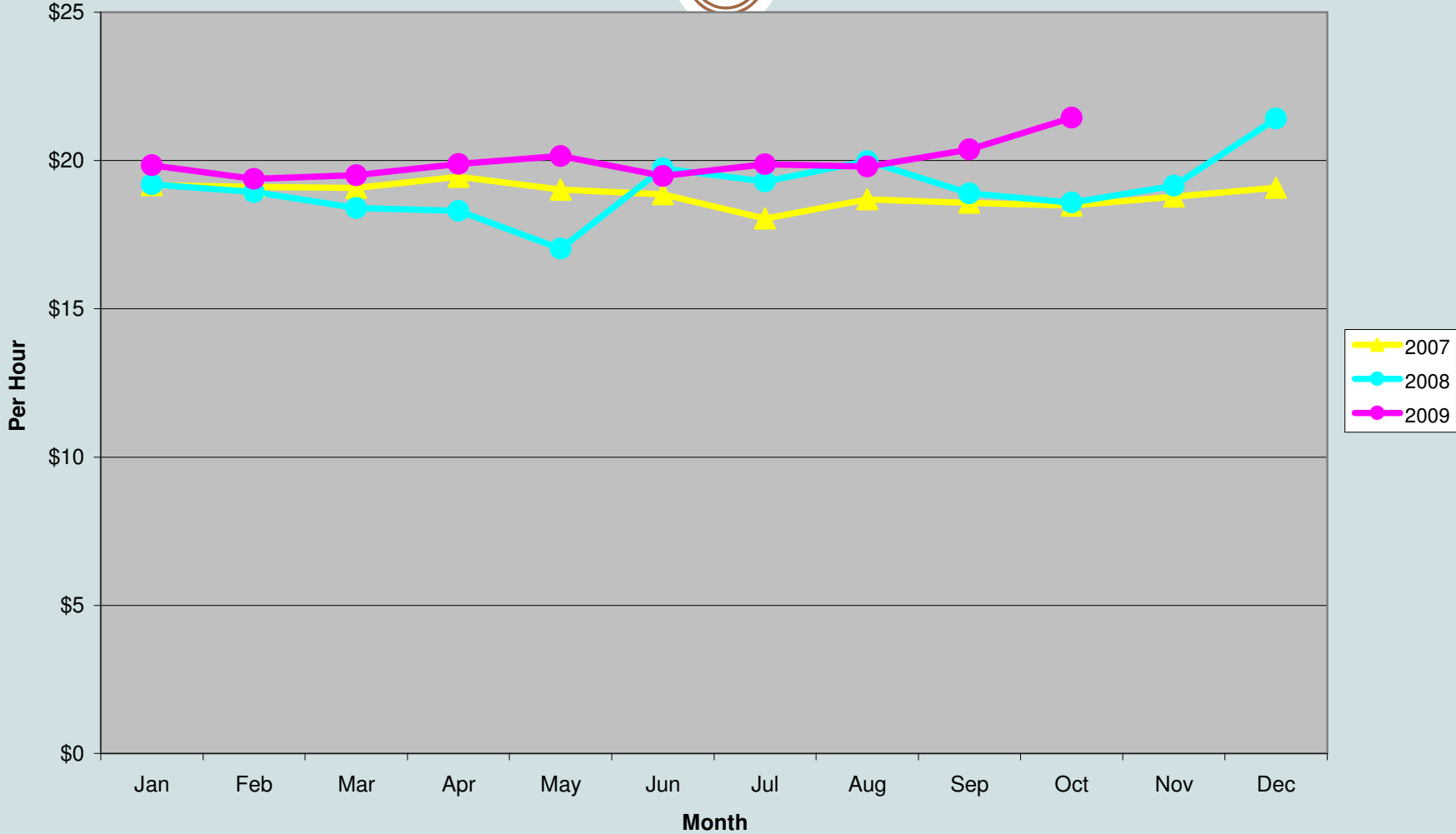
Average Durable Goods Manufacturing Weekly Hours

Kansas



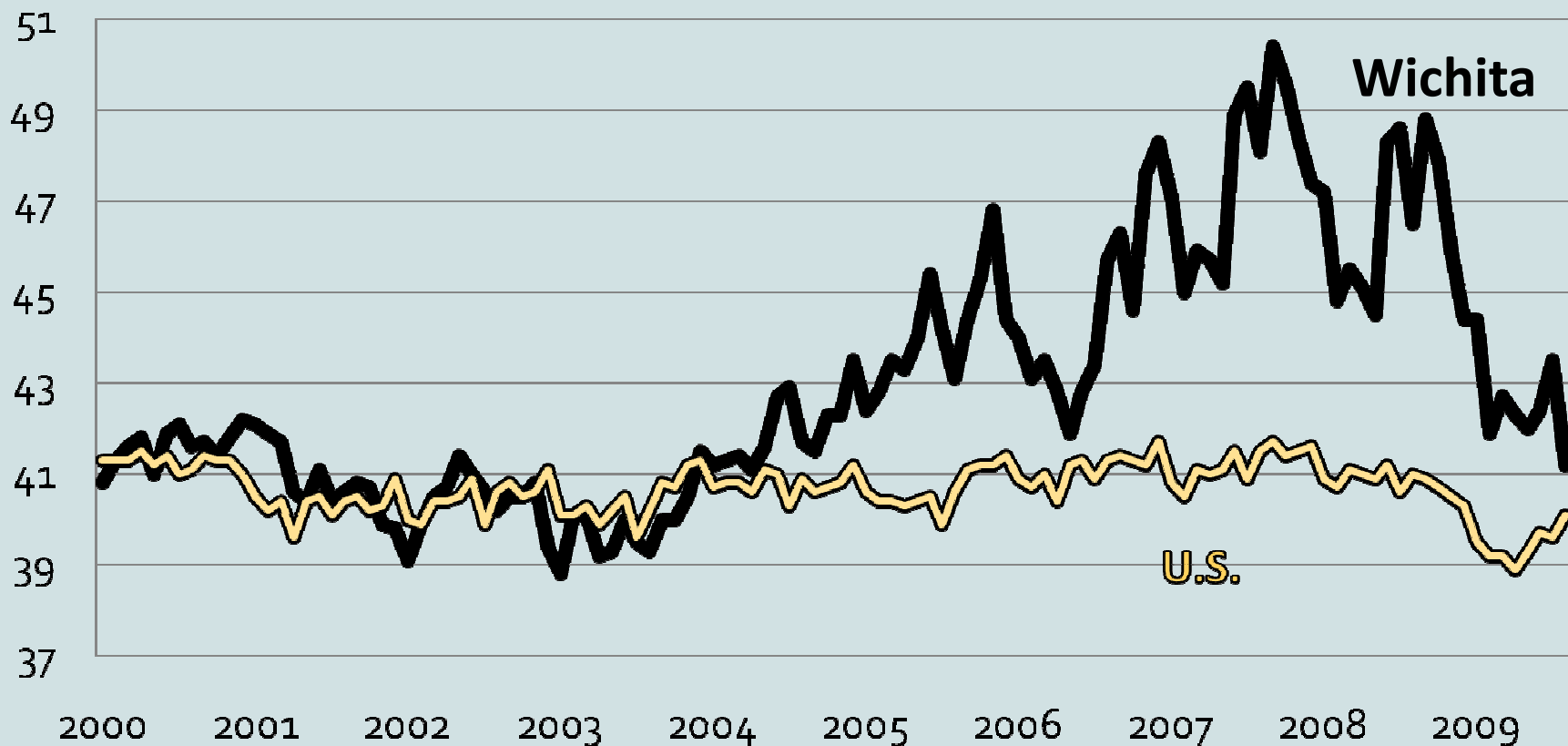
Durable Goods Manufacturing Hourly Earnings

Kansas



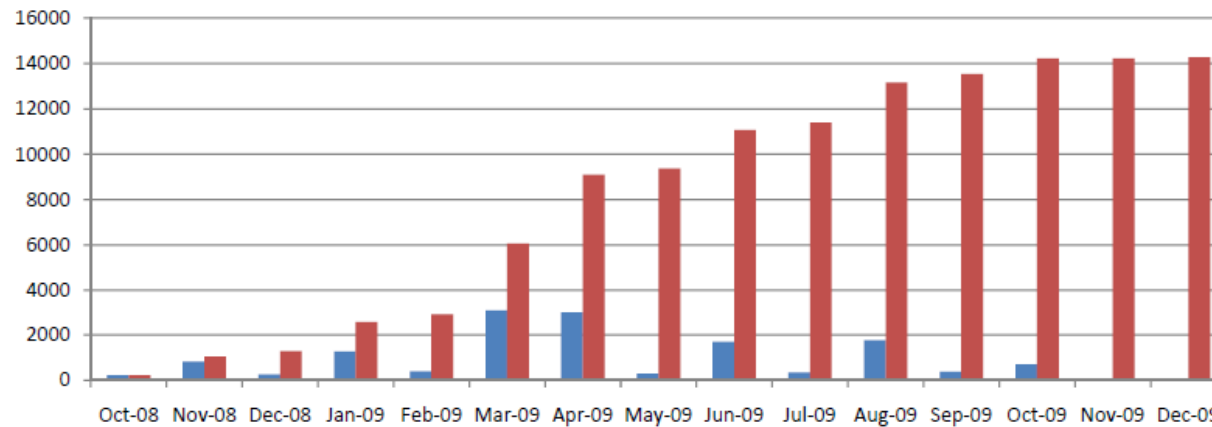
Average Hours Worked per Week in Manufacturing

Monthly



The chart below tracks the timing of the layoffs – the actual date the layoffs have taken place or when a termination date has been set, not the date the layoff was announced.

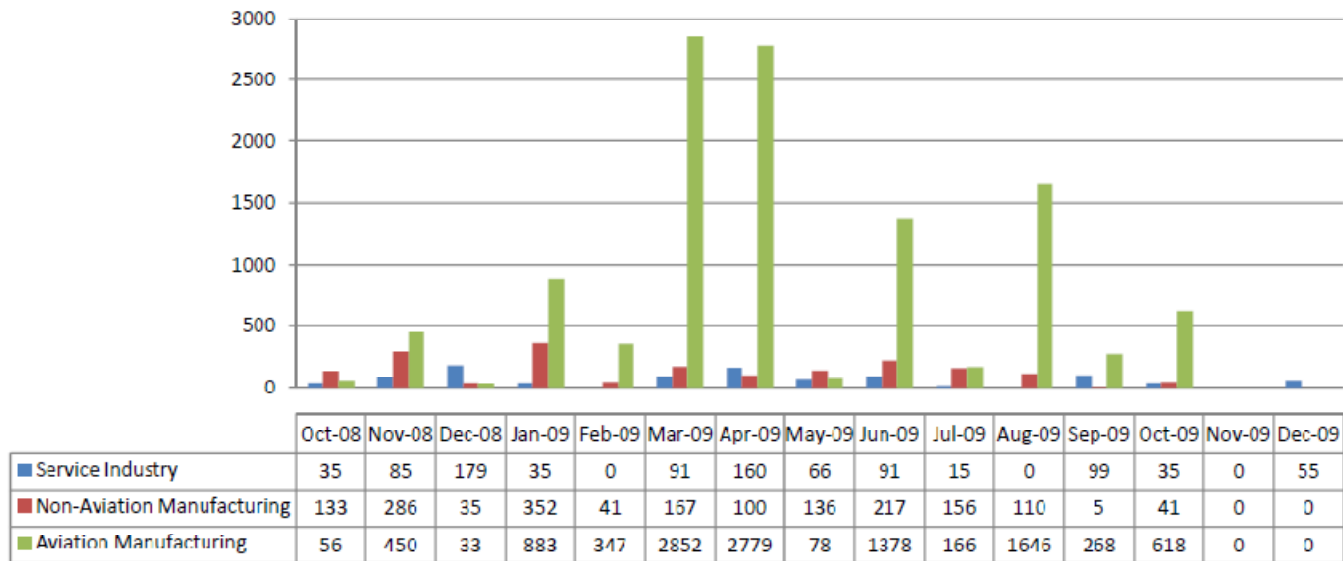
Monthly Layoffs in Local Area IV
As reported to the Workforce Alliance
October 1, 2008 to September 17, 2009



	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09
■ New Layoffs	224	821	247	1270	388	3110	3039	280	1686	337	1756	372	694	0	55
■ Total Layoffs	224	1045	1292	2562	2950	6060	9099	9379	11065	11402	13158	13530	14224	14224	14279

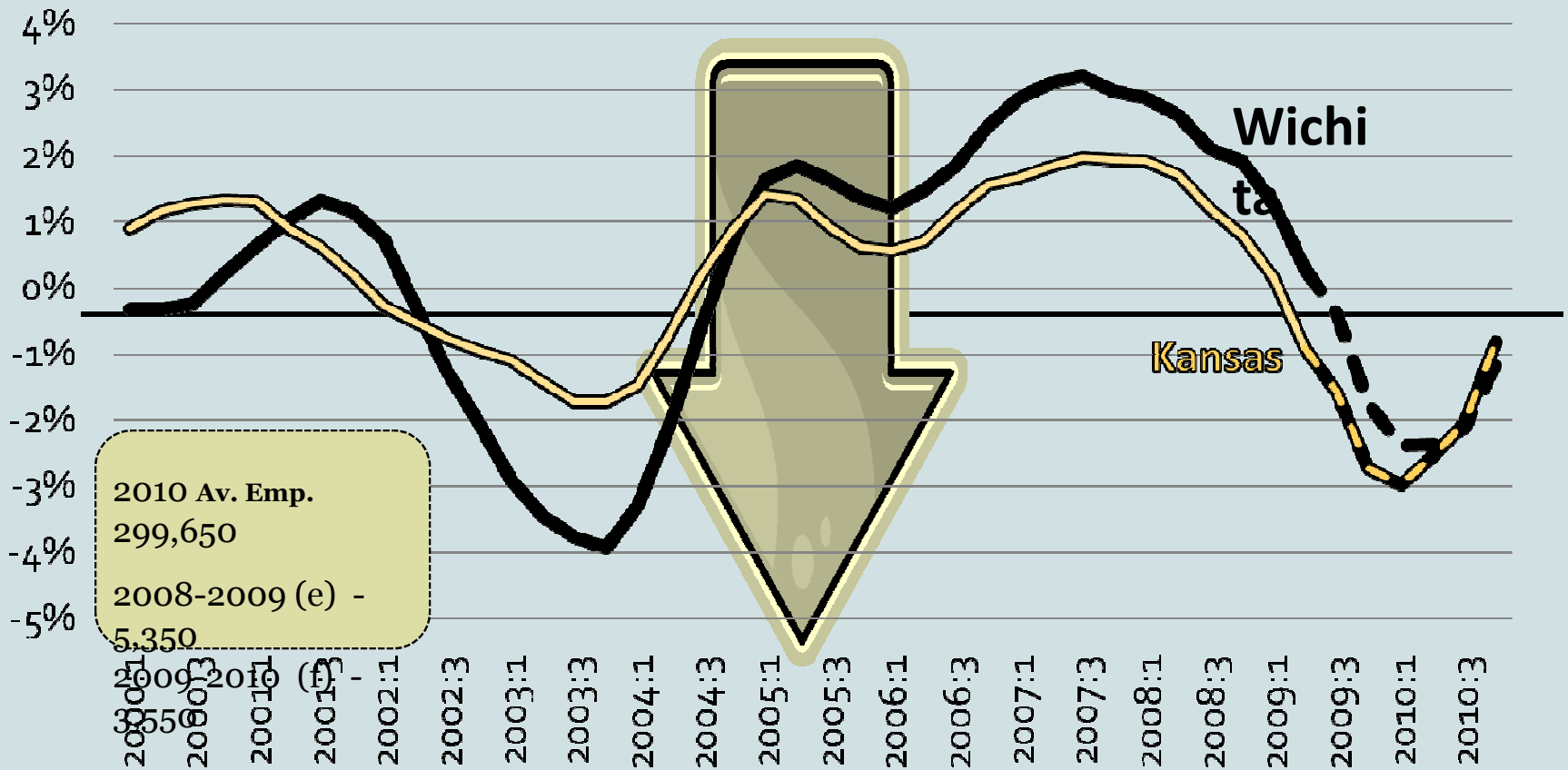
The chart below tracks the timing of the layoffs by industry – the actual date the layoffs have taken place or when a termination date has been set, not the date the layoff was announced.

Monthly Layoffs by Industry
 As reported to the Workforce Alliance
 October 1, 2008 to September 17, 2009



Total Non-Farm Employment

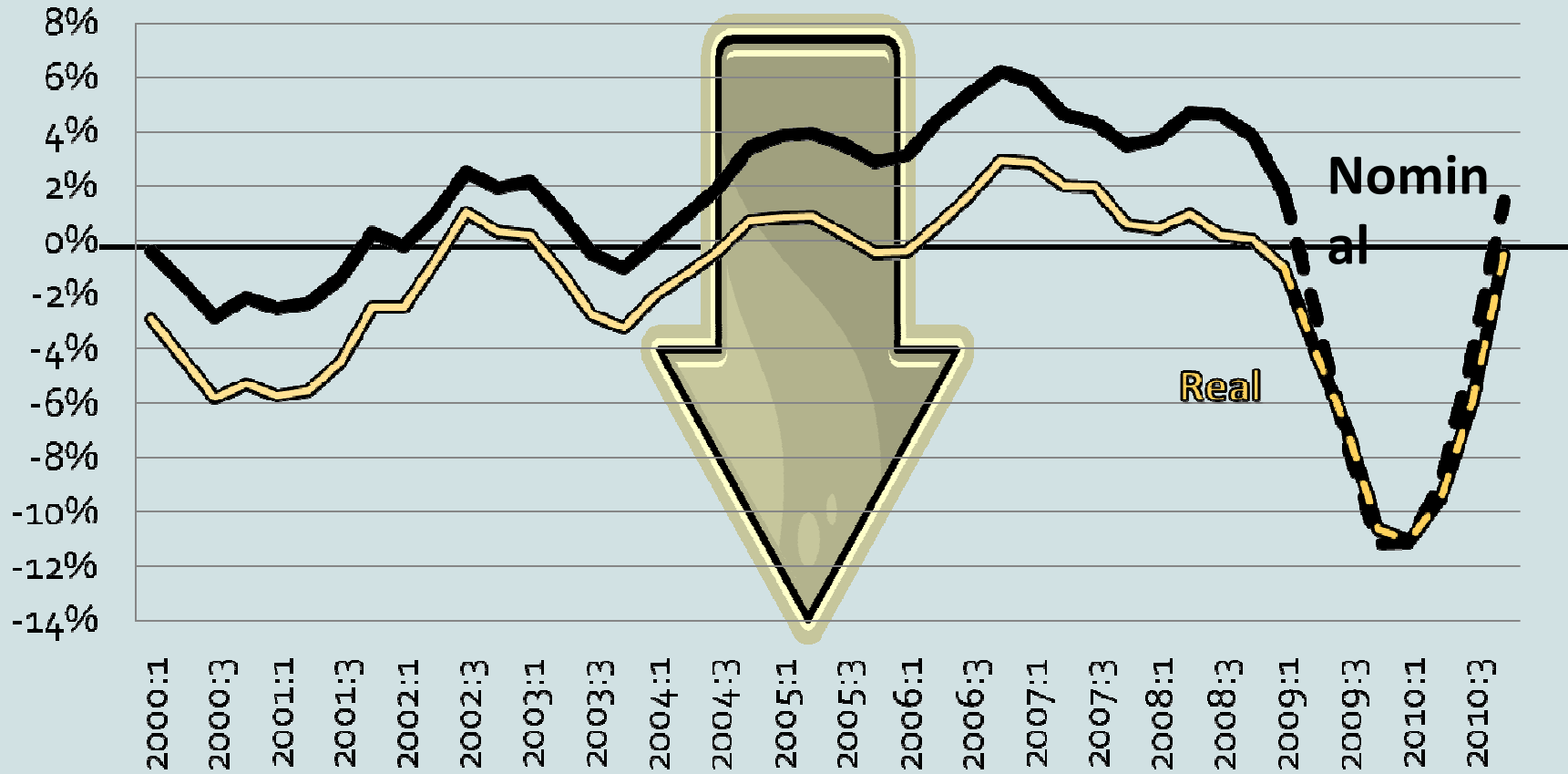
Four Quarter Moving Average Year-over-Year Percentage Change



Retail Sales



Four Quarter Moving Average Year-over-Year Percentage Change



Data Source: Kansas Department of Revenue; Estimate/Forecast CEDBR, Wichita State University

Cessna Cancels Columbus



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Cessna's suspended Citation Columbus program has been cancelled due to current market conditions, according to an 8K filing from parent company Textron. And Pratt & Whitney Canada has confirmed it has halted work on the PW810C engine designed to power the Columbus.

The PW810C was originally scheduled to run for the first time this year. The company says "we still see it as a suspension" until the market recovers, even after the Textron announcement.

Pratt & Whitney says it remains committed to, and continues working on, the PW800 engine family, which shares core technology with the PW1000G geared turboprops under development to power the Mitsubishi Regional Jet and Bombardier CRJ-900 regional jet.

The Columbus was first announced Feb. 6, 2006 and Cessna unveiled it Oct. 6 at the annual National Business Aviation Association convention. Cessna tapped Parker Aerospace's Control Systems Division to supply a hybrid fly-by-wire flight control system for the aircraft, making it the first member of the Citation line to be equipped with that system.

The aircraft would have had a maximum cruise speed of 488 knots, a maximum operating speed of Mach .86, a full fuel payload of 1,950 pounds and takeoff field length of 5,400 feet at maximum takeoff weight. Cessna had hoped for FAA certification by the end of 2013, with deliveries beginning in 2014.

Cessna in April 2008 announced it would build a new plant in Wichita, Kan., to build the Columbus after the Kansas state legislature offered \$33 million in incentives to keep the program in the state. Textron had announced it was investing \$780 million into development of the Columbus, and said the new aircraft line would create up to 1,000 new jobs with an estimated annual payroll of \$74 million.

As of November 2008, Cessna held more than 70 orders for the \$27 million aircraft.

Artist's concept: Cessna

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Wichita Business Journal - July 10, 2009
Wichita stories/230007/09/cally54.html

Wichita Business Journal - July 10, 2009

Wichita Business Journal

Friday, July 10, 2009 | Modified Monday, July 13, 2009

Textron cancels Cessna Columbus program

Wichita Business Journal by [Daniel McCoy](#)

Textron Inc., the parent company of **Cessna Aircraft Co.**, has canceled the Columbus wide-body jet project, according to a filing submitted Thursday with the Security and Exchange Commission.

In April, the company announced it would suspend the program, leading Cessna leaders to say it would only be a matter of time until the project came back.

But in Thursday's filing with the SEC, Textron (NYSE:TXT) said "Upon additional analysis of the business-jet market related to this product offering, we decided to formally cancel further development of the Citation Columbus."

Textron says it already had incurred about \$50 million in capitalized tooling and facility costs related to the project. It says it will record a non-cash pre-tax charge of about \$43 million for the first two quarters of 2009 to reflect the impairment of the facility and tooling assets.

Wichita Mayor Carl Brewer, who was in Denver Friday at a **National Association of Cities** conference, had not heard the Columbus project was being canceled until asked about it by the Wichita Business Journal.

"I'm disappointed," Brewer says. "... We believe this is part of the future for the city of Wichita. We're just really disappointed that it happened."

At the same time, he says, he understands the economic climate has forced businesses to make tough decisions.

The project was to have built 600,000-square-foot final assembly building at Cessna where the majority of the \$27 million business jet would be built. There was also to have been a 45,000-square-foot physical plant to serve the main building.

Construction costs were expected to be \$200 million and bids were put out in March.

These five general contractors all received approval from Cessna to bid on the project:

- **The Law Co. Inc.**
- **Key Construction Inc.**
- **Bondlinger & Sons Construction Co.**
- **Martin K. Eby Construction Co. Inc.**
- Columbus, Kan.-based **Crossland Construction Co. Inc.**

Apart from the loss in construction jobs, the Wichita area now appears to have lost out for good on the 1,000 direct jobs and the 3,000 spin-off jobs the program was estimated to create.

It also appears likely that Cessna will have to pay back the \$10 million it received in city and county incentives and the \$33 million it received from the state for the project.

Like Brewer, Sedgewick County Commissioner Tim Norton says he is disappointed to hear the news of the cancellation.

"I think most Wichitans and the business community looked at that as a big announcement," he says. "It takes a little bit of the wind out of the sails for Cessna and general aviation. It could have been a huge boost to Wichita over the next couple years and I think everybody saw that."

Norton says he hopes the project will be able to return somewhere down the line. The business plan that was put in place, he says, still could be a good fit.

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Could Wichita Become the Next Detroit?



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Joseph C. Anselmo and William Garvey/Wichita
Could Wichita become the next Detroit?

A little more than a year ago, comparisons of the self-proclaimed "Air Capital of the World" with such a potent symbol of industrial decline were far from the minds of most business and civic leaders in Wichita. Demand was at an all-time high for the business jets, turboprops and Boeing 737 fuselages being cranked out of factories in this city of 364,000, the largest in Kansas. As companies scrambled to fill openings, engineering students at Wichita State University were virtually guaranteed well-paying jobs when they graduated. "Wichita's aircraft industry has hit an all-time hot streak, selling out production on some models for years to come," the Wichita Eagle, the region's daily newspaper, wrote in June 2008.

Even when the global credit crisis hit three months later, there were still hopes the industry would be shielded by record backlogs and global orders that had made it less reliant on the U.S. economy. As the National Business Aviation Assn. (NBAA) convention opened in Orlando, Fla., in October 2008, aircraft manufacturers were telling their suppliers to expect no cuts in production rates. A Honeywell forecaster opined that the credit crisis's impact on the industry would be "a short-term blip."

Then it all came crashing down, with a suddenness and severity that no executives had foreseen, even in their worst-case models. Unable to secure financing, huge numbers of buyers deferred delivery or abandoned their deposits and walked away. Meanwhile, new orders slowed to a trickle as a global recession intensified and politicians in Washington, including President Barack Obama, attacked the use of private jets as a symbol of corporate excess (see p. 58).

In less than a year, Wichita's three business jet producers—Cessna, Hawker Beechcraft and Bombardier's Learjet—have shed about 12,000 jobs, or nearly 20% of the local aerospace workforce, and watched billions of dollars of backlog vanish. Only Spirit AeroSystems—an airstructures manufacturer that relies on production of large passenger jets built by Boeing—has been able to avoid layoffs.

"It is as bad as I've ever seen it for that industry, and I've been doing this for 34 years," says Tom Buffenbarger, president of the International Assn. of Machinists (IAM). "In September 2008 we had 9,000 openings in Wichita for machinists, aircraft certified welders, avionics technicians and aircraft sheet metal people. And today we have 11,000 [union member] layoffs. That's a shift of 20,000 jobs right there."

And nobody is quite sure how many more jobs have been lost at suppliers and other businesses down the food chain. Nordam, for example, has cut more than three-quarters of the positions at a Wichita facility that supplies business jet cabinetry. "There are an awful lot of small shops and companies that were completely dependent on the aerospace industry that are going to go by the wayside or get consolidated," says Cessna Chairman, CEO and President Jack Pelton.

The damage is almost certain to continue into 2010, albeit at a slower pace. Honeywell now predicts deliveries will bottom out at 40-45% below their 2008 peak and will not reach that level again until 2017 (see p. 61). And when they do, Wichita's business aircraft manufacturers will be facing another challenge—an onslaught from lower-cost overseas competitors. Notable among these is Brazil's Embraer, an experienced aircraft producer that is aiming to slatter price-versus-value expectations with its line of light, medium and large executive jets.

But do all these factors make Wichita the next Detroit? A visit to the front line of the business aviation industry's meltdown certainly does not reveal any striking similarities between the two cities. Wichita is not full of abandoned factories, crumbling houses or other signs of urban blight. Unemployment insurance has helped keep large numbers of workers from leaving the city. And while the jobless rate of 9.7% is the worst this region has seen in years, it is on par with the national average and nowhere near Detroit's 28.9% unemployment rate.

"You still have trouble getting a table in our restaurants," say Mayor Carl Brewer. "Our hotels are full. People are still shopping."

But some worrying parallels emerge if Wichita is compared with the Detroit of the early 1970s. Today's Wichita and yesterday's Motor City are the centers of dominant U.S. industries that prospered for decades with little foreign competition.

Both have endured strikes by heavily unionized workforces. And both face the arrival of low-cost competitors that are disrupting long-held business models. Wichita's share of the business turbine aircraft market already has slid to 51% in 2008 from a peak of 74% in the mid-1990s, according to an analysis of delivery data from the General Aviation Manufacturers Assn.

A good starting point for a look at the economic tsunami that hit this industry is Cessna's sprawling business and general aviation complex, which is located at Mid-Continent Airport on the western edge of town. With mass cancellations and an anemic order intake that averaged just three aircraft per month for the first five months of 2009, backlog shrank to \$8.2 billion from \$16 billion in just nine months. In response, Cessna has cut its workforce to 8,300 from 16,000, forfeiting the title of Wichita's biggest employer to Spirit. Those reductions far exceed the 22% of jobs cut by the company during the business jet downturn of 2002-03.

Cessna's \$775-million development of the 4,000-naut.-mi.-range Citation Columbus, launched with great fanfare in 2008, was scrapped in May. And this summer it closed all of its assembly lines for four weeks and furloughed most employees. The Citation Sovereign line remains dark. "You see work in progress that is just shut down," laments Pelton. "Growing up in this country, you think of the steel industry and factories we've seen becoming ghost towns."

Because the business jet industry typically lags corporate profits by eight quarters, jobs lost in recent months will not be coming back anytime soon. Pelton says it will take at least five years for Cessna to get back to 2008 production levels. But he also believes comparisons of Wichita with Detroit are overblown. Cessna, Learjet and Spirit have so far managed to remain profitable, he notes. And business jet builders "are continuing to develop new products based on customers' needs rather than guesswork. We are continuously innovating. Customer service is not just an afterthought."

The question of whether Wichita will become the next Detroit finds more resonance on the other end of town at Hawker Beechcraft, where a contract dispute with the IAM led to a month-long strike in 2008. "If we continue to be the recipient of dull thinking from a lot of quarters, the answer could be 'yes,'" says Bill Boisture, a longtime business aviation veteran who was tapped as chairman and CEO in March. "From both an organized labor and government [lack of support] standpoint, there is a pretty strong parallel."

Hawker Beechcraft's private-equity owners paid a top-of-the-market price of \$3.3 billion when they bought the company from Raytheon in 2007. Now Boisture believes the industry's stellar run in 2007-08 was a bubble inflated by cheap and readily available credit for aircraft buyers, a weak U.S. dollar that made jets a bargain for international buyers, and a rush of deliveries of the Eclipse 500 very light jet, whose manufacturer subsequently went bankrupt.

A more realistic benchmark, he says, is 2006. But even that level of deliveries will not be reached for another 5-6 years, he predicts. In the meantime, Hawker is hoping that growing sales of military products—such as the T-6B/C trainer, a light attack variant and King Air special-mission aircraft—will offset slumping commercial sales and help the company survive the downturn.

Boisture denies rumors that Hawker Beechcraft is in danger of going bankrupt, though "there are [competitors] here who would like us to be." But the dramatic re-sizing of the industry has raised questions about whether there are now too many manufacturers—Hawker, Cessna, Bombardier, Gulfstream, Dassault, Embraer and niche players.

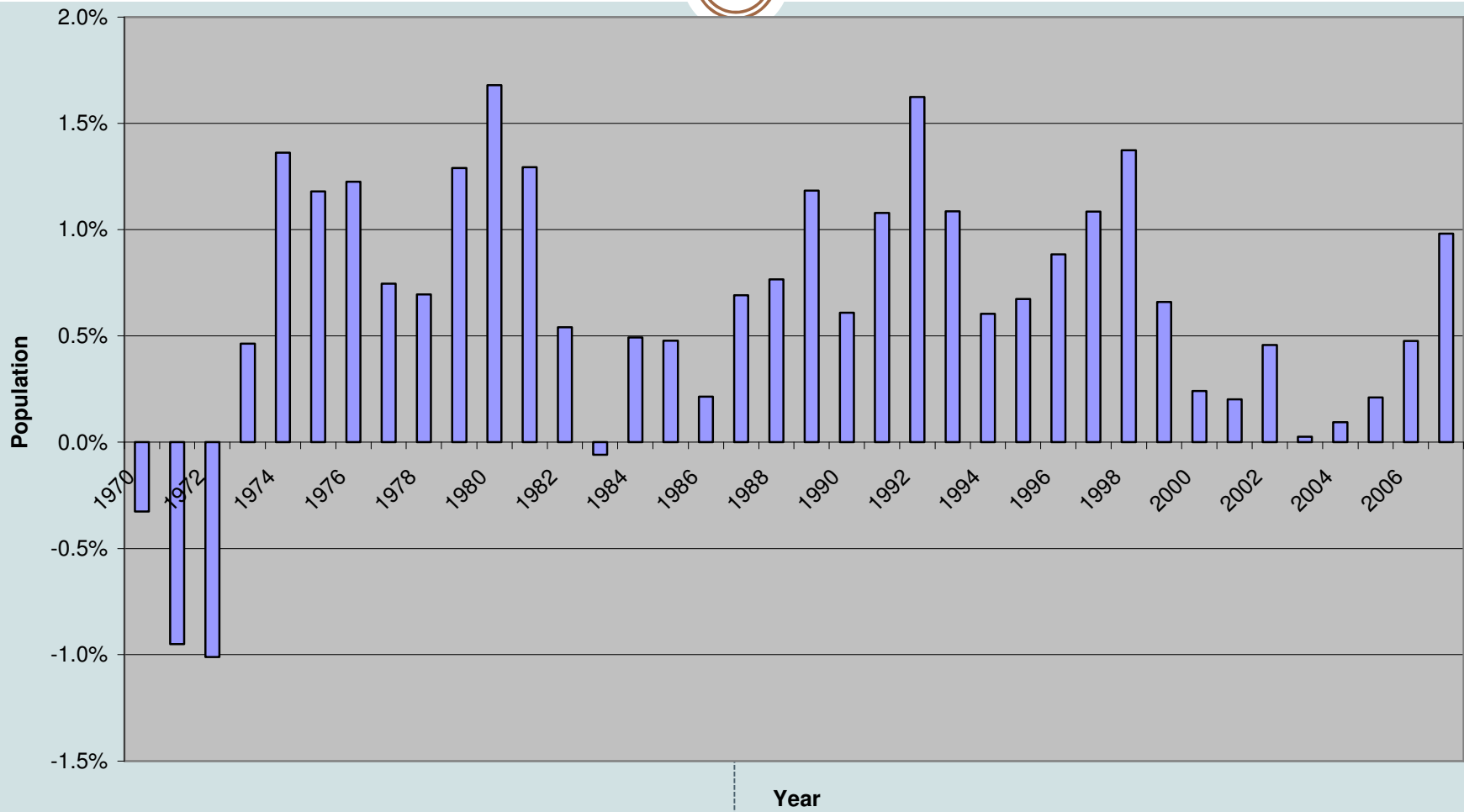
"Could there be consolidation?" Boisture asks. "Yeah, there could be."

Embraer's disruptive entry into the market—and the potential of a Chinese rival down the road—could force U.S. business aviation titans to send more work to low-wage countries to remain competitive on price. Cessna already does all standard wire-harness assembly and assorted sheet-metal-parts fabrication and subassembly in Mexico and is establishing a composites center of excellence there. The company also contracted to have its new SkyCatcher light trainer fabricated in China so it could be competitively priced. "We have been working on our cost structure continuously," says Pelton. "With the support of the IAM, we hope this never becomes a disadvantage."

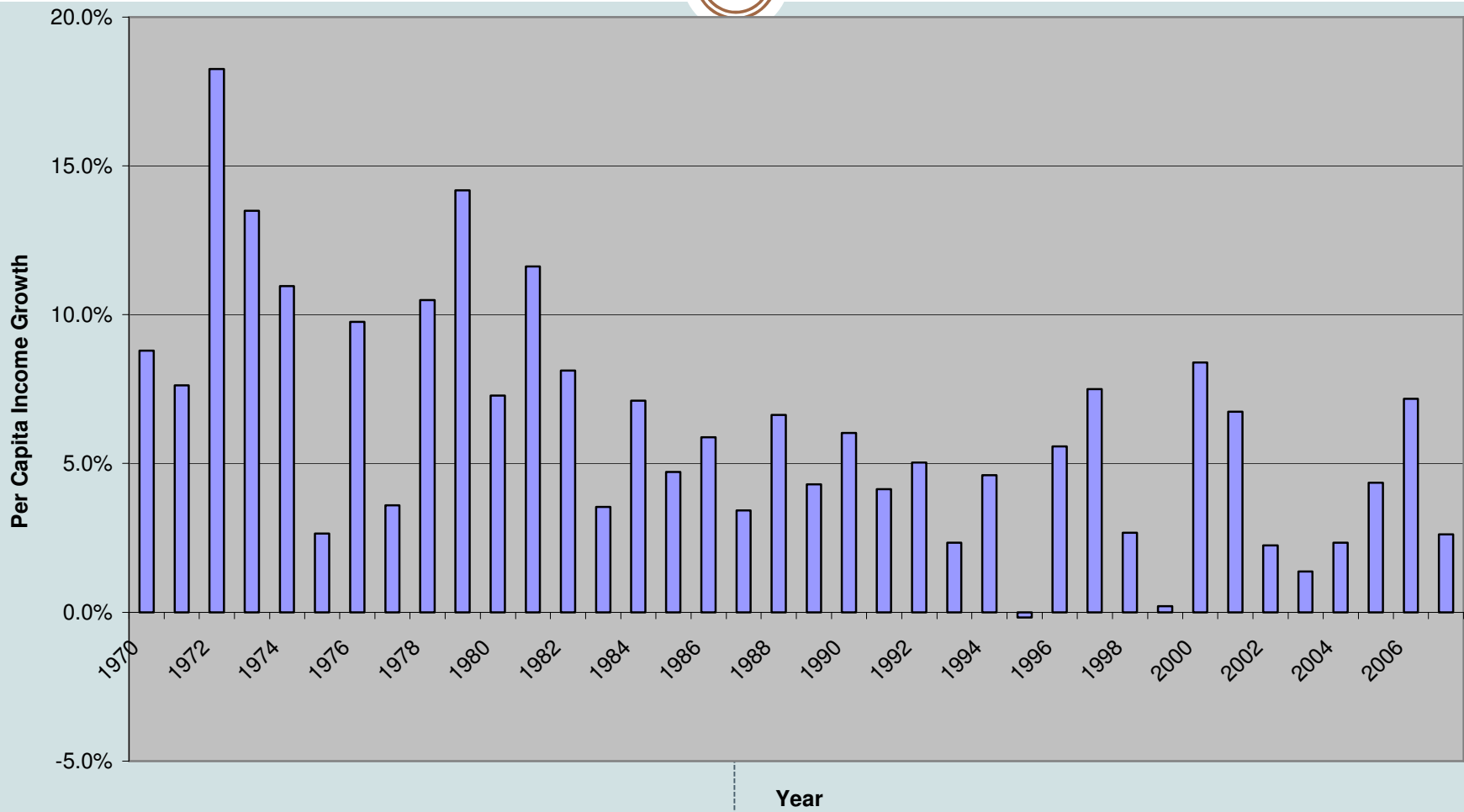
Meanwhile, Bombardier's Learjet is betting heavily on its Model 85, now under development, its largest aircraft ever and its first all-new product in 15 years. The \$17-million twinjet, which will be the first all-composite FAR Part 25-certified aircraft, is to begin service in 2013. While the aircraft will be completed at Lear's Mid-Continent facility by some 400-500 workers, all manufacturing will take place at a 190,000-sq.-ft. factory under construction in Queretaro, Mexico, about 200 km. (125 mi.) north of Mexico City.

Bombardier began assembling wire harnesses in Queretaro in 2006 with 12 workers; today, it employs more than 1,000. Their work includes assembling the entire aft section of the Global Express, Bombardier's top-of-the-line business jet. Ultimately, 850 yet-to-be hired workers could be employed on the Model 85 program in Mexico.

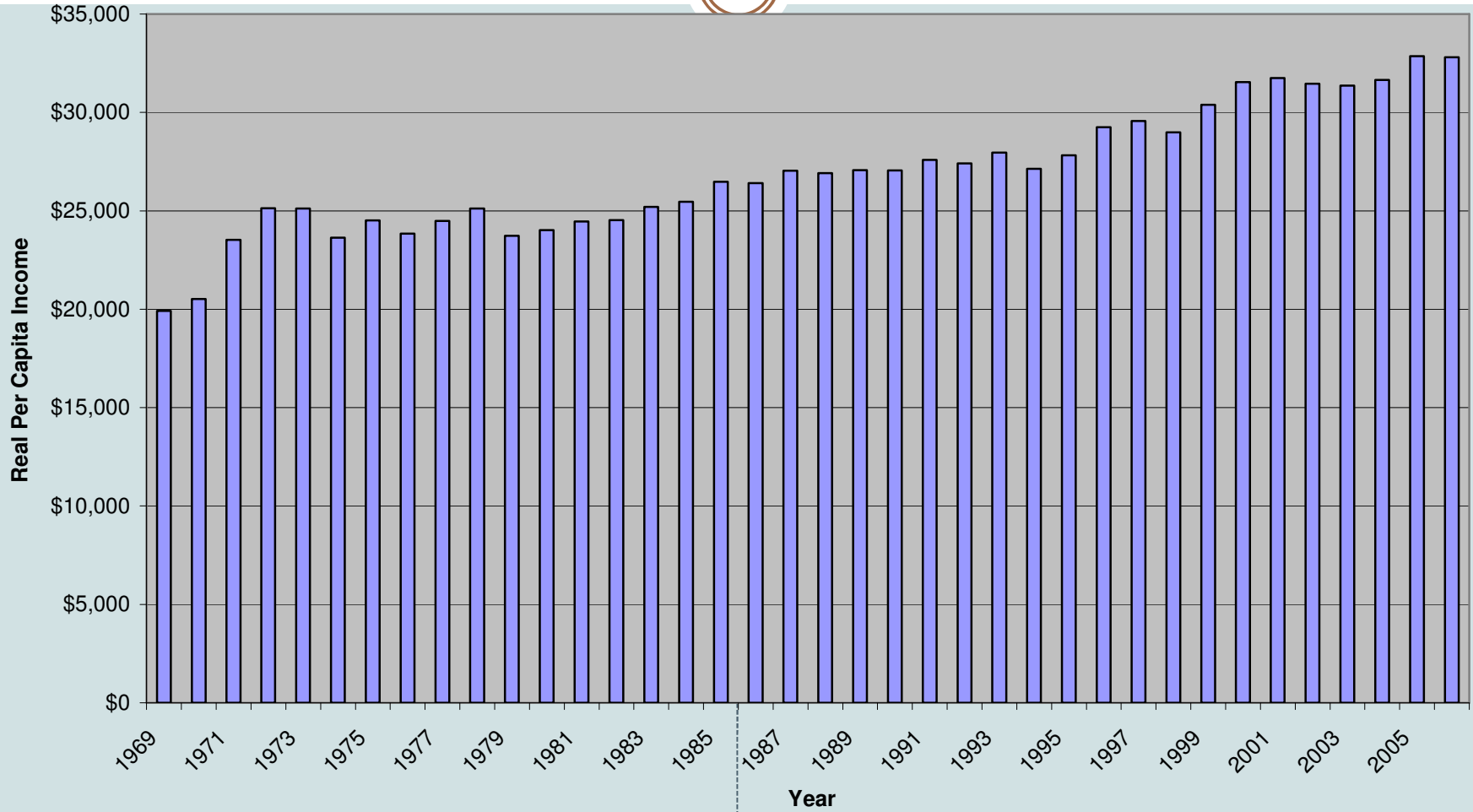
**Population Growth
Regional Economic Area Partnership (REAP)
1970-2007**



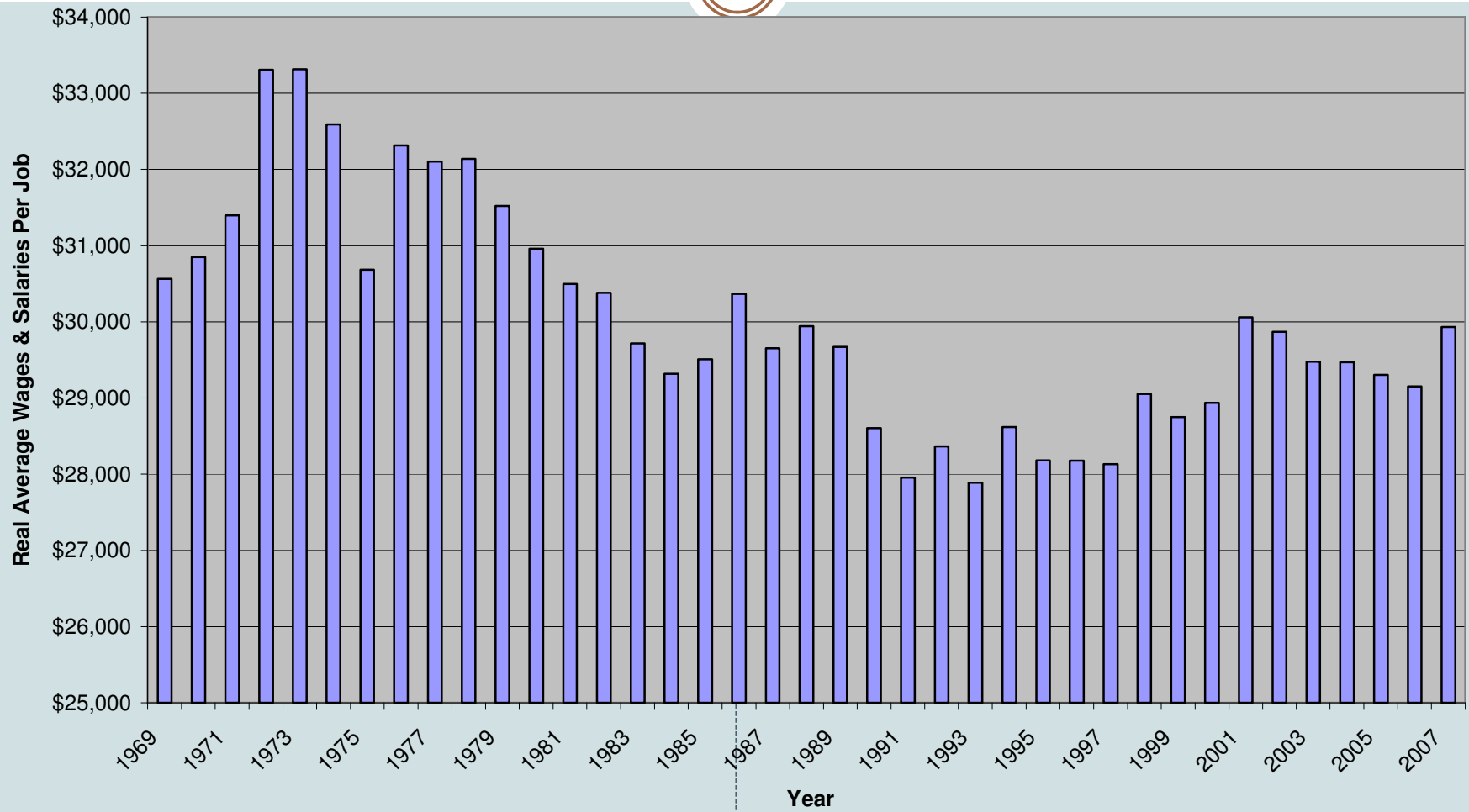
**Per Capita Income Growth
Regional Economic Area Partnership (REAP)
1970-2007**



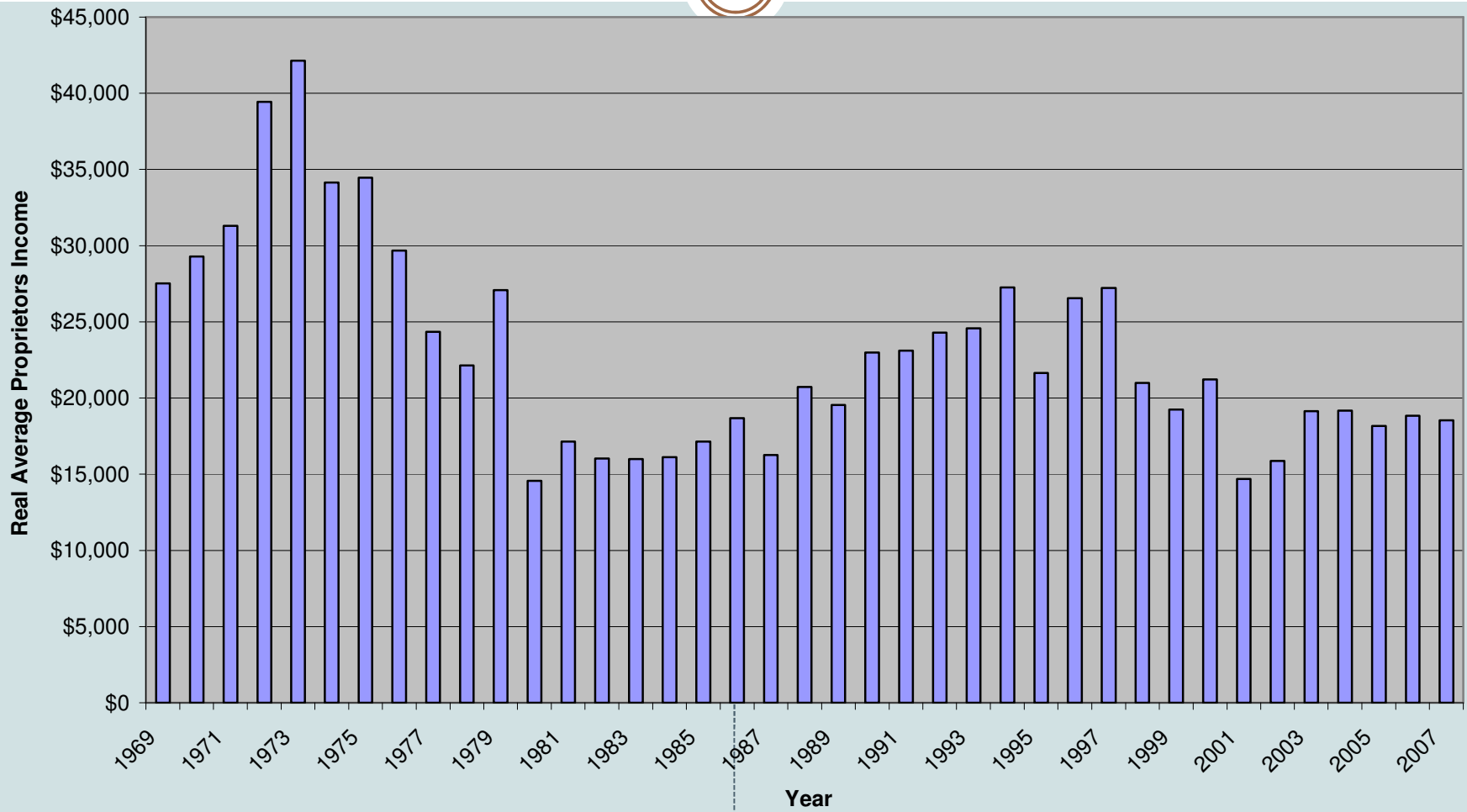
**Real Per Capita Income
Regional Economic Area Partnership (REAP)
1969-2007**



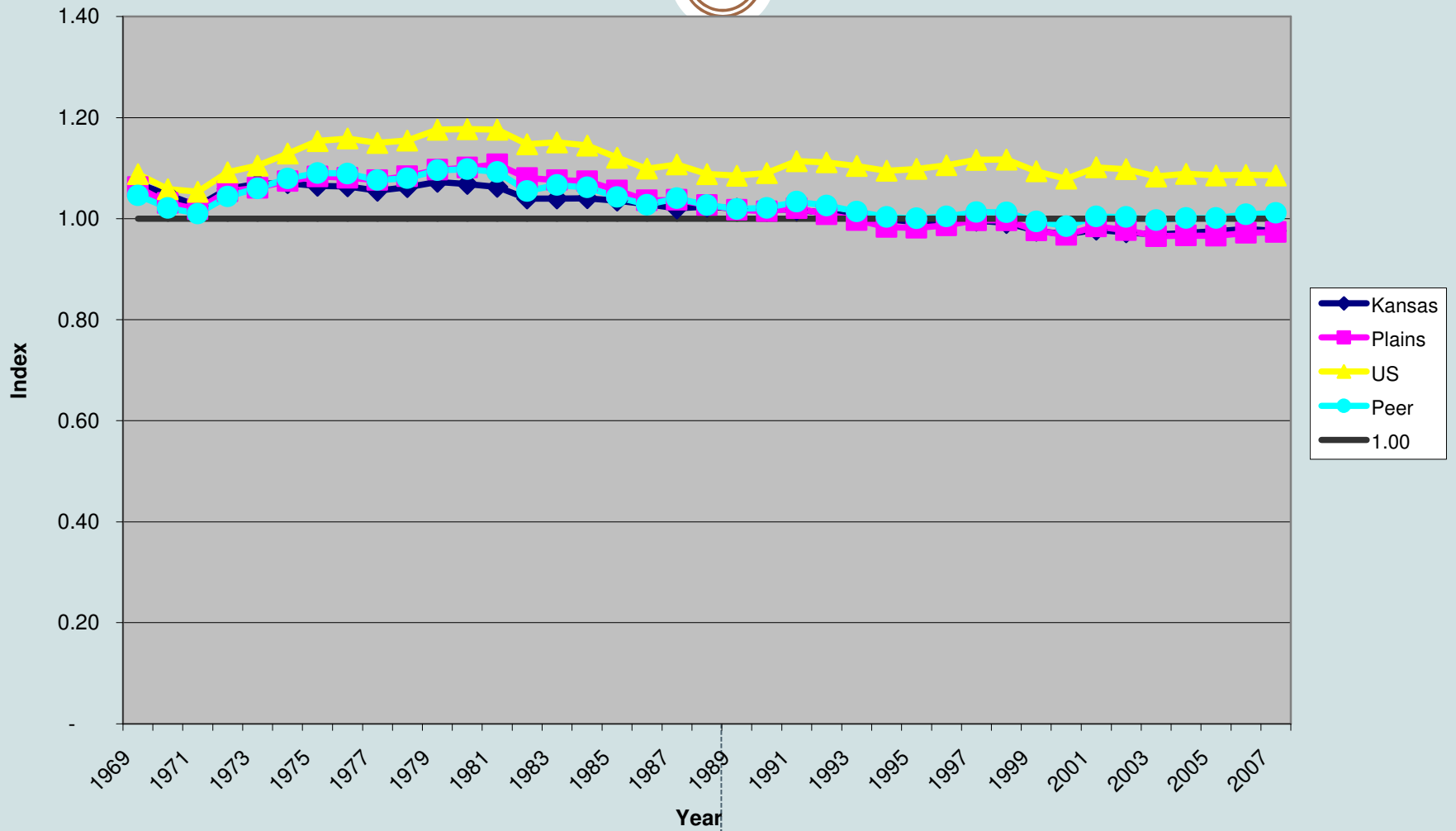
**Real Average Wages & Salaries Per Job
Regional Economic Area Partnership (REAP)
1969-2007**



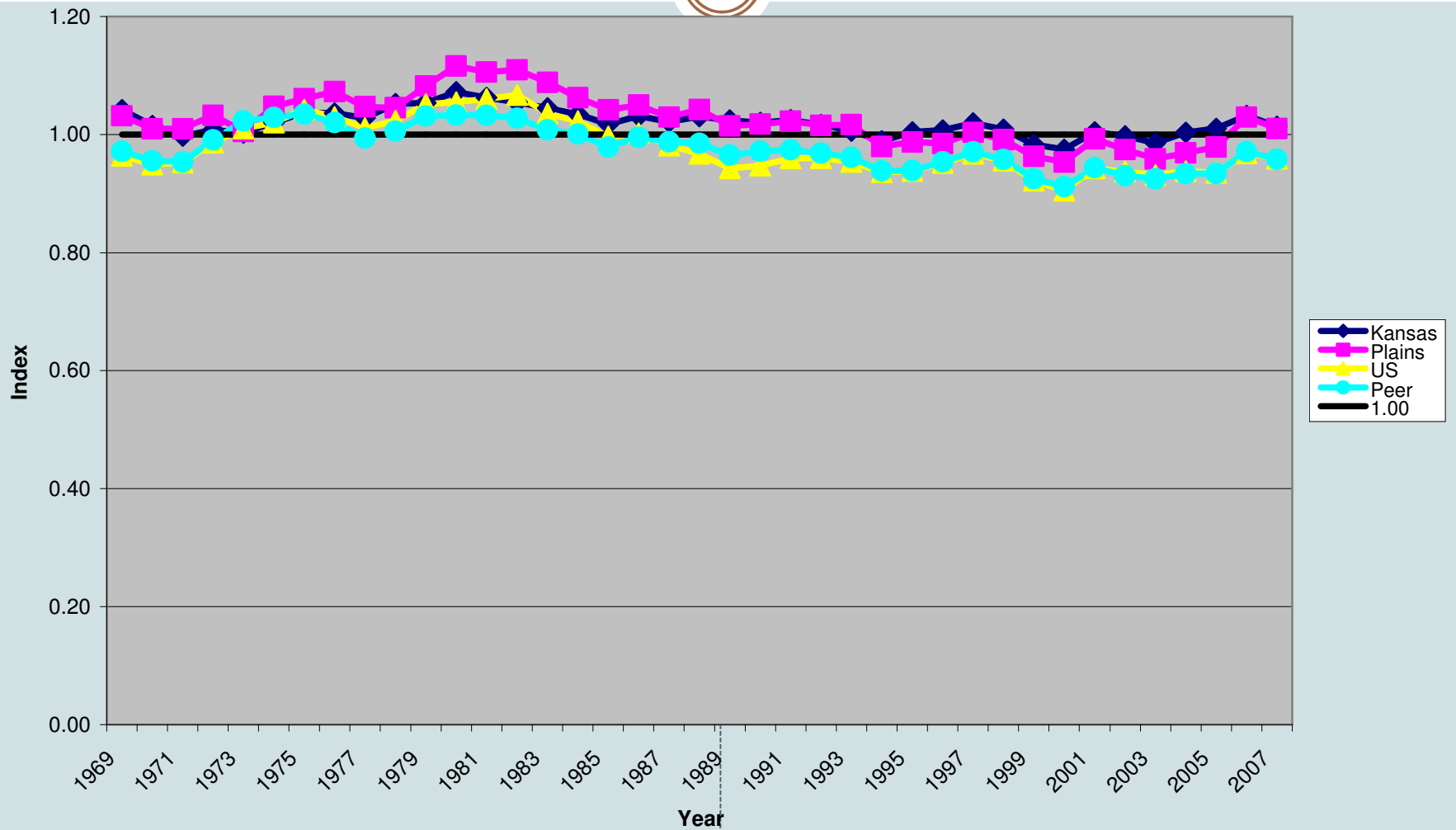
**Real Average Proprietors Income
Regional Economic Area Partnership (REAP)
1969-2007**



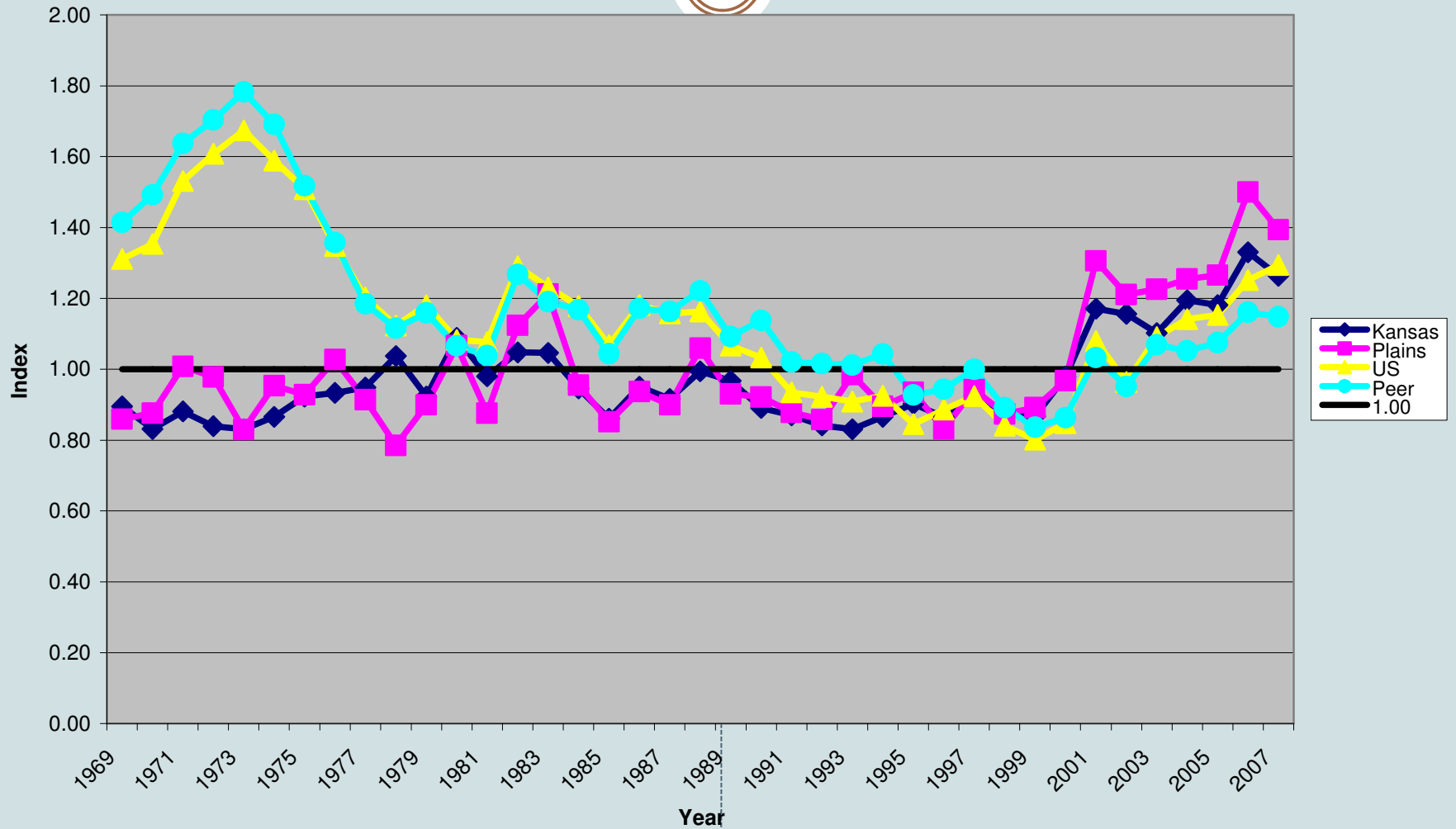
EMPLOYMENT INDEX 1969-2007



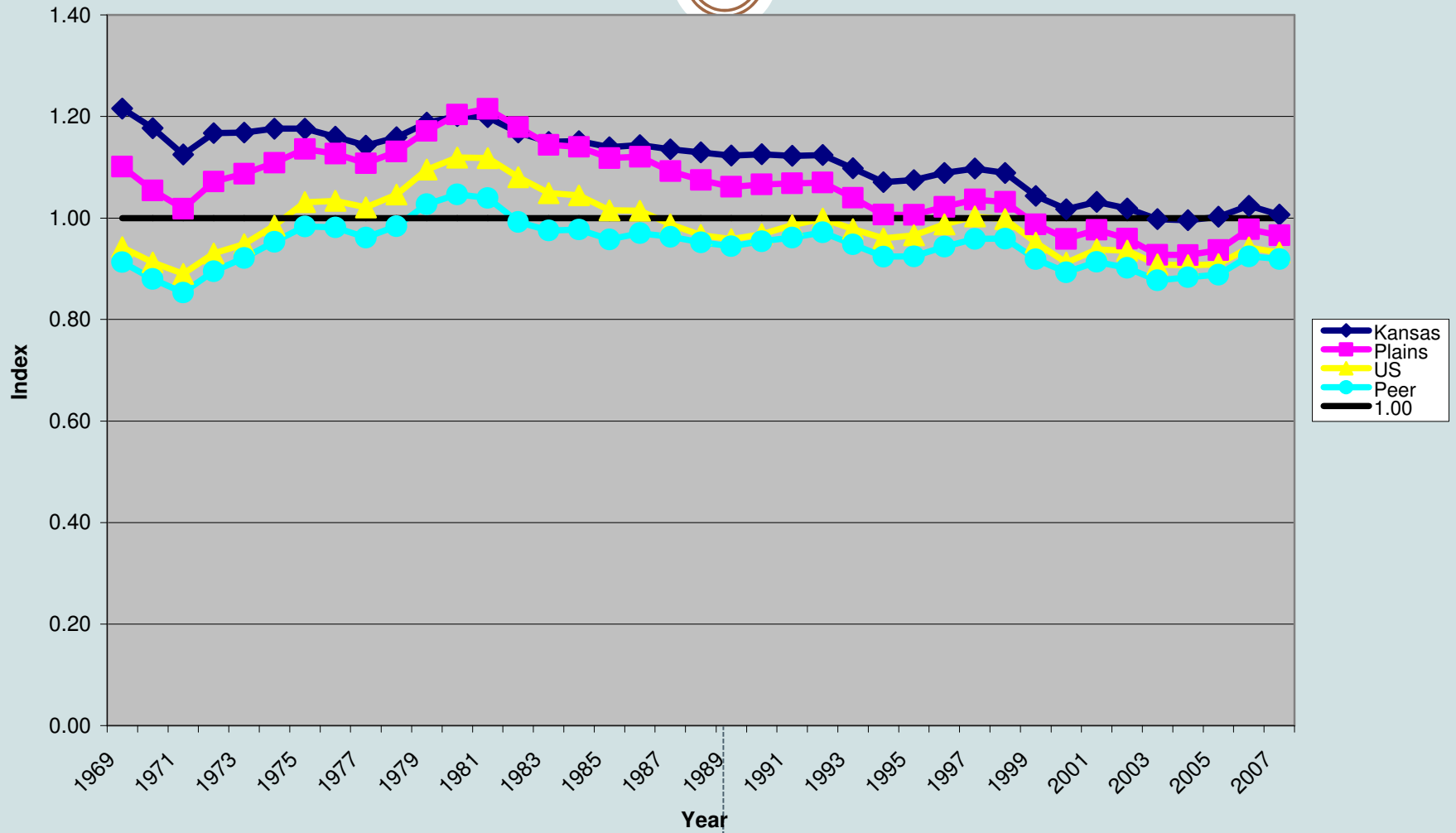
PERSONAL INCOME INDEX 1969-2007



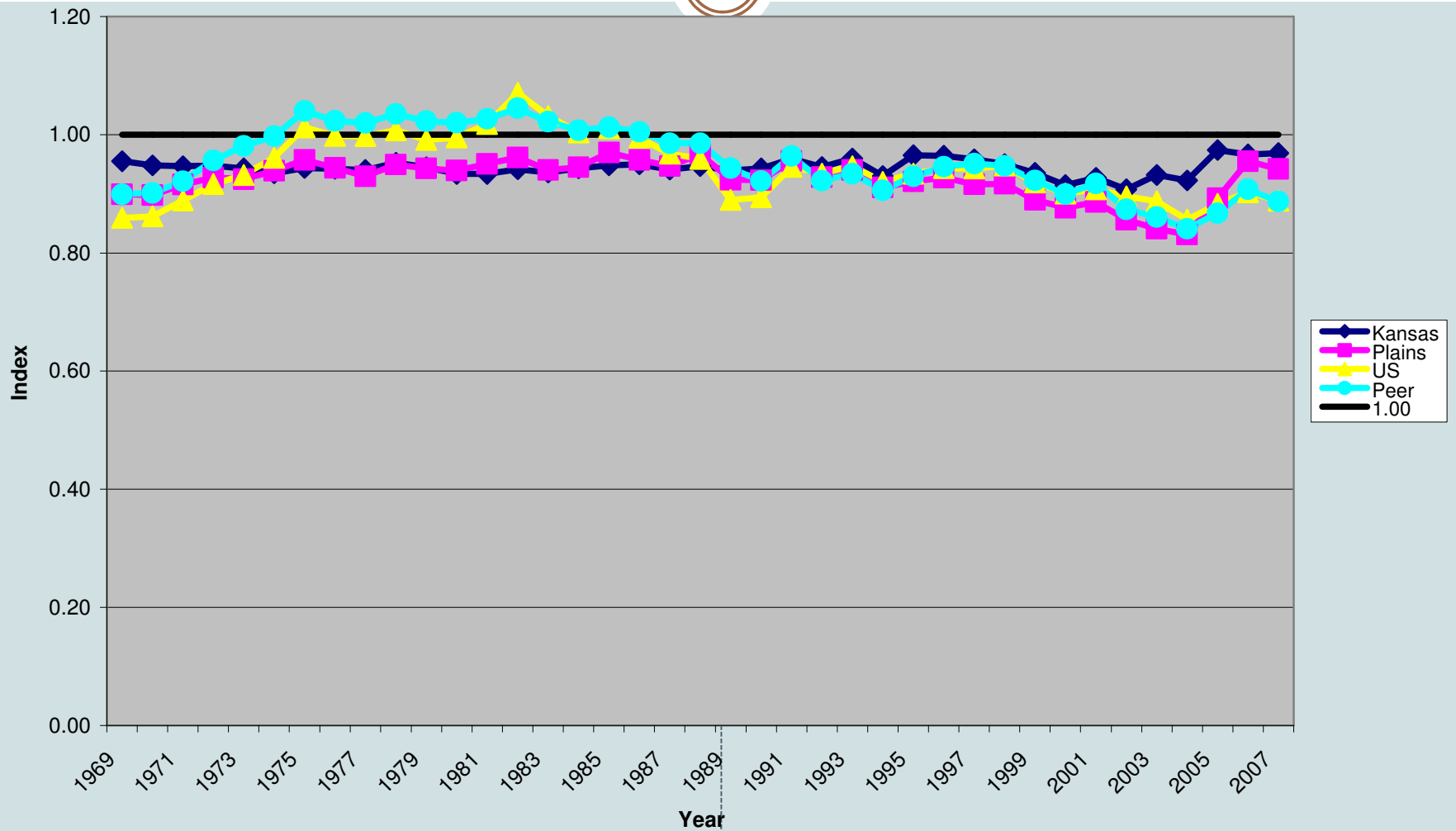
PROPRIETORS INCOME INDEX 1969-2007



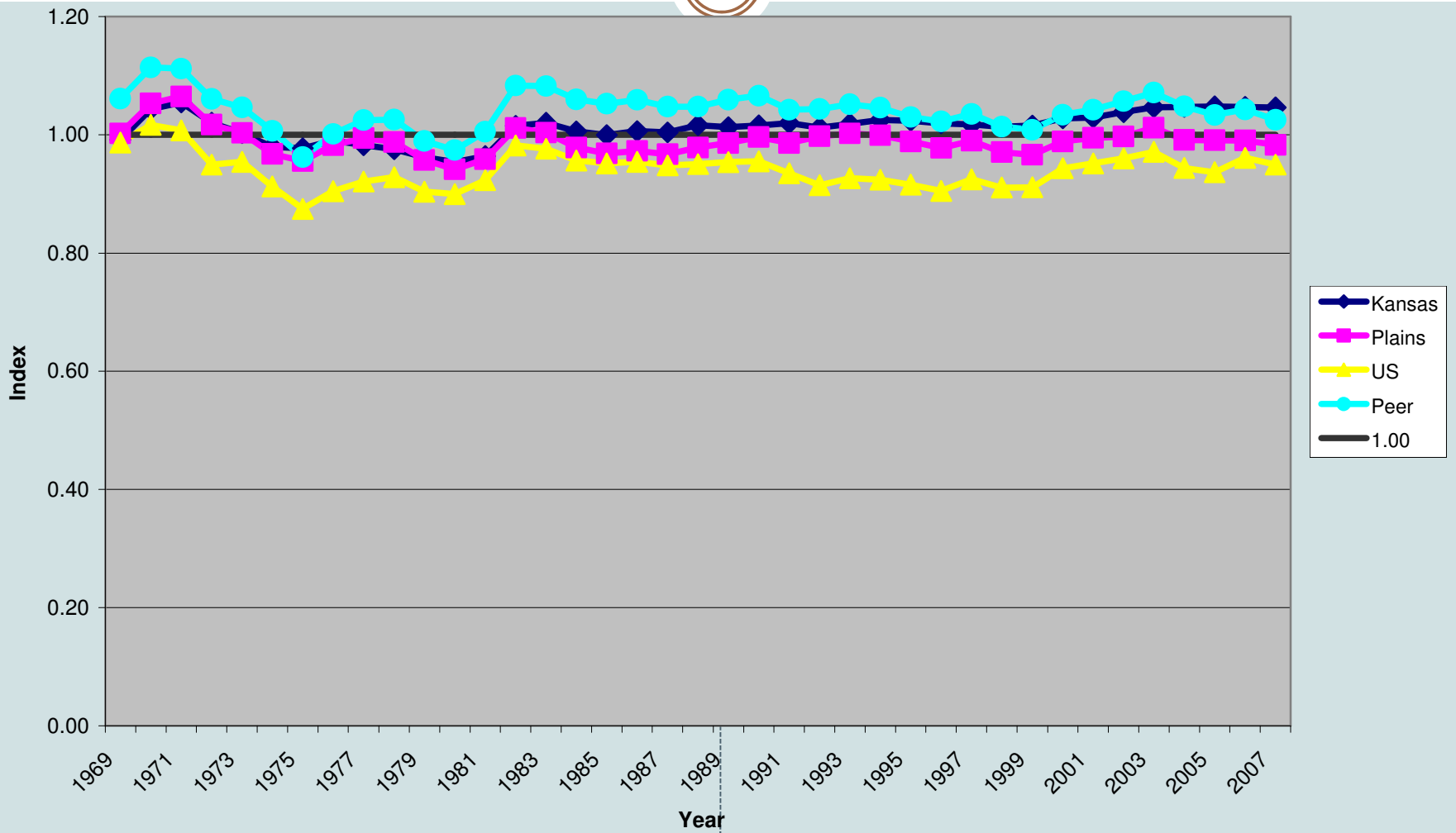
EARNED INCOME INDEX 1969-2007



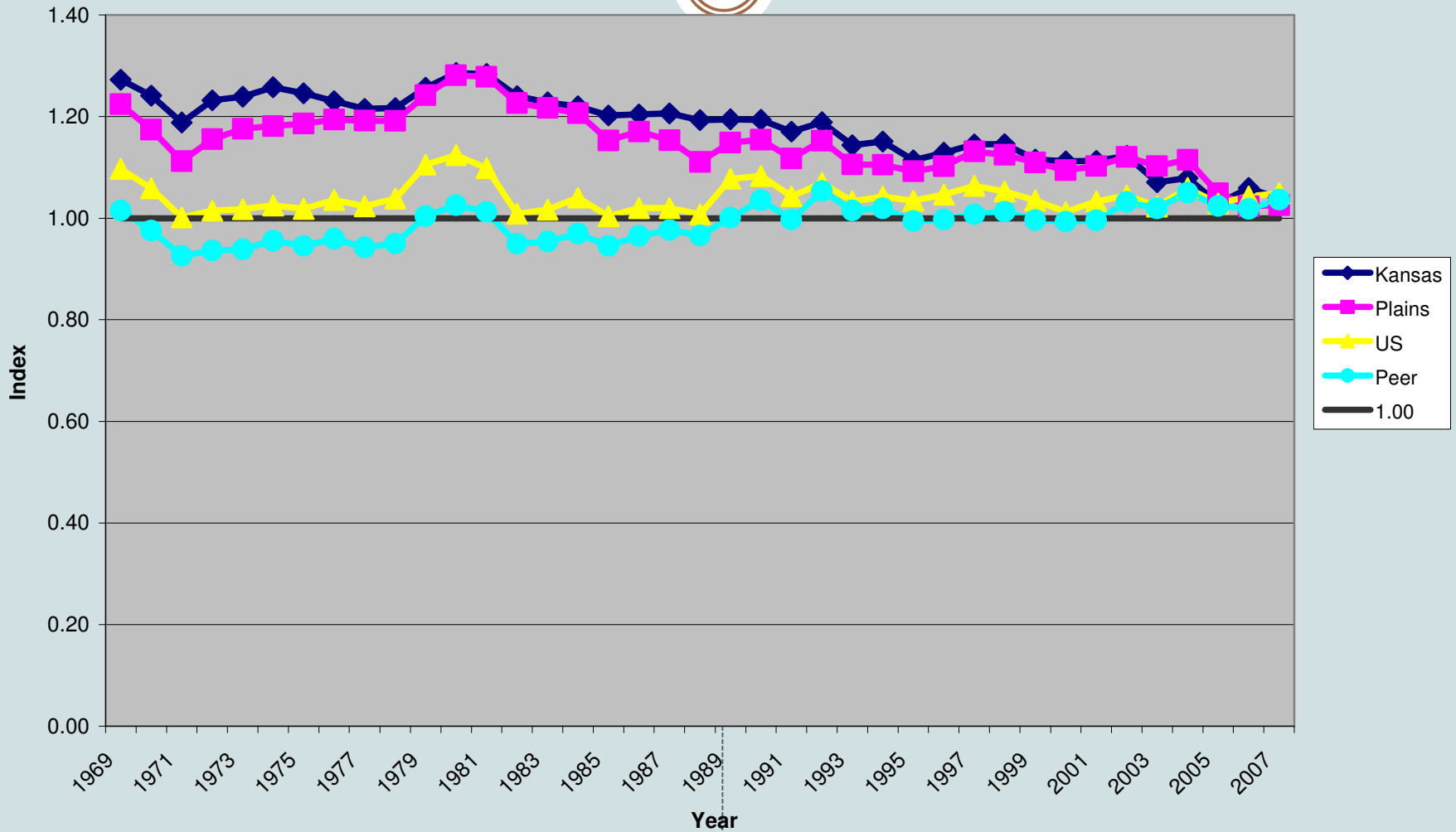
WEALTH INCOME INDEX 1969-2007



TRANSFER INCOME INDEX 1969-2007

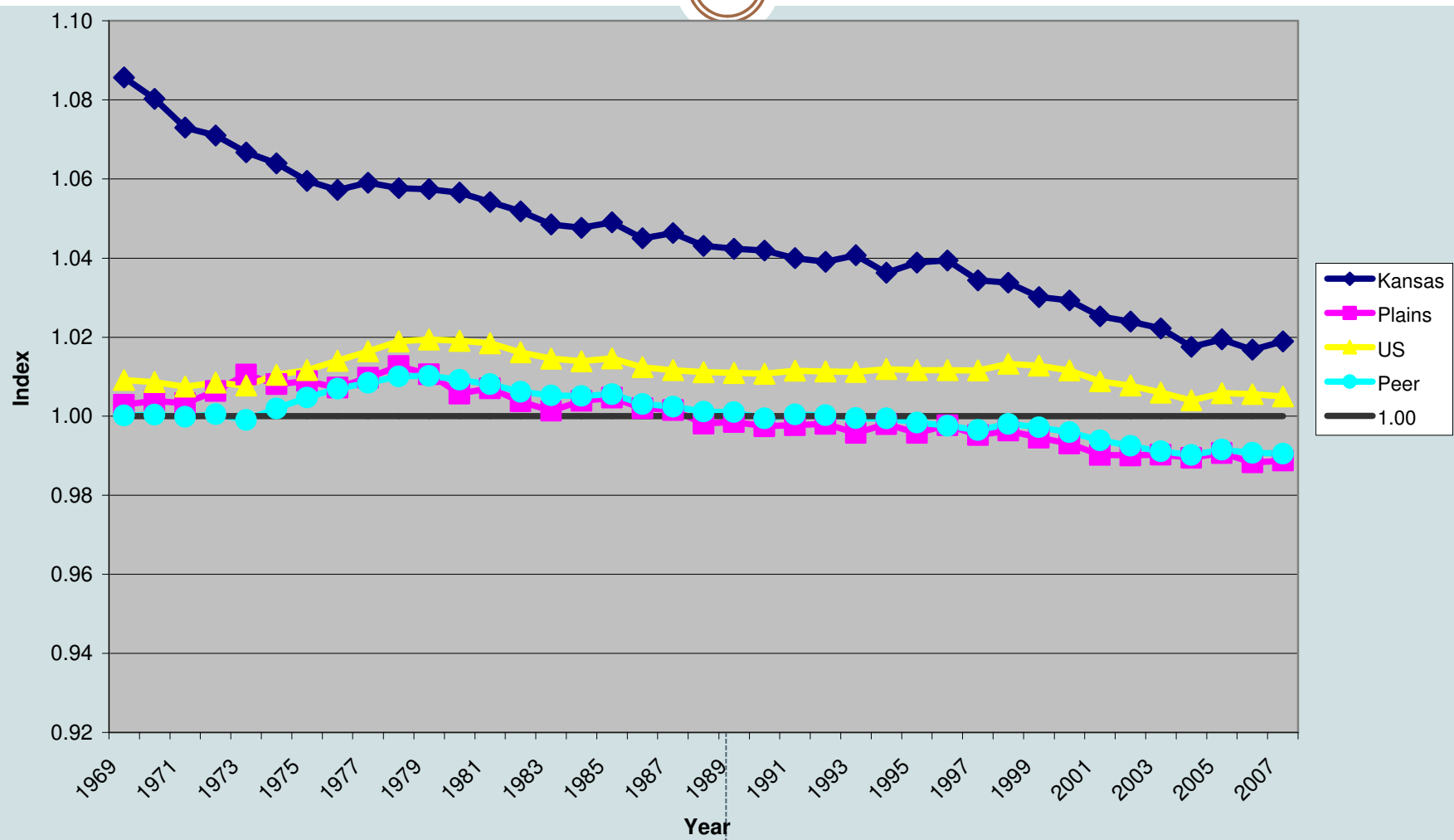


ACTIVE/PASSIVE RATIO 1969-2007

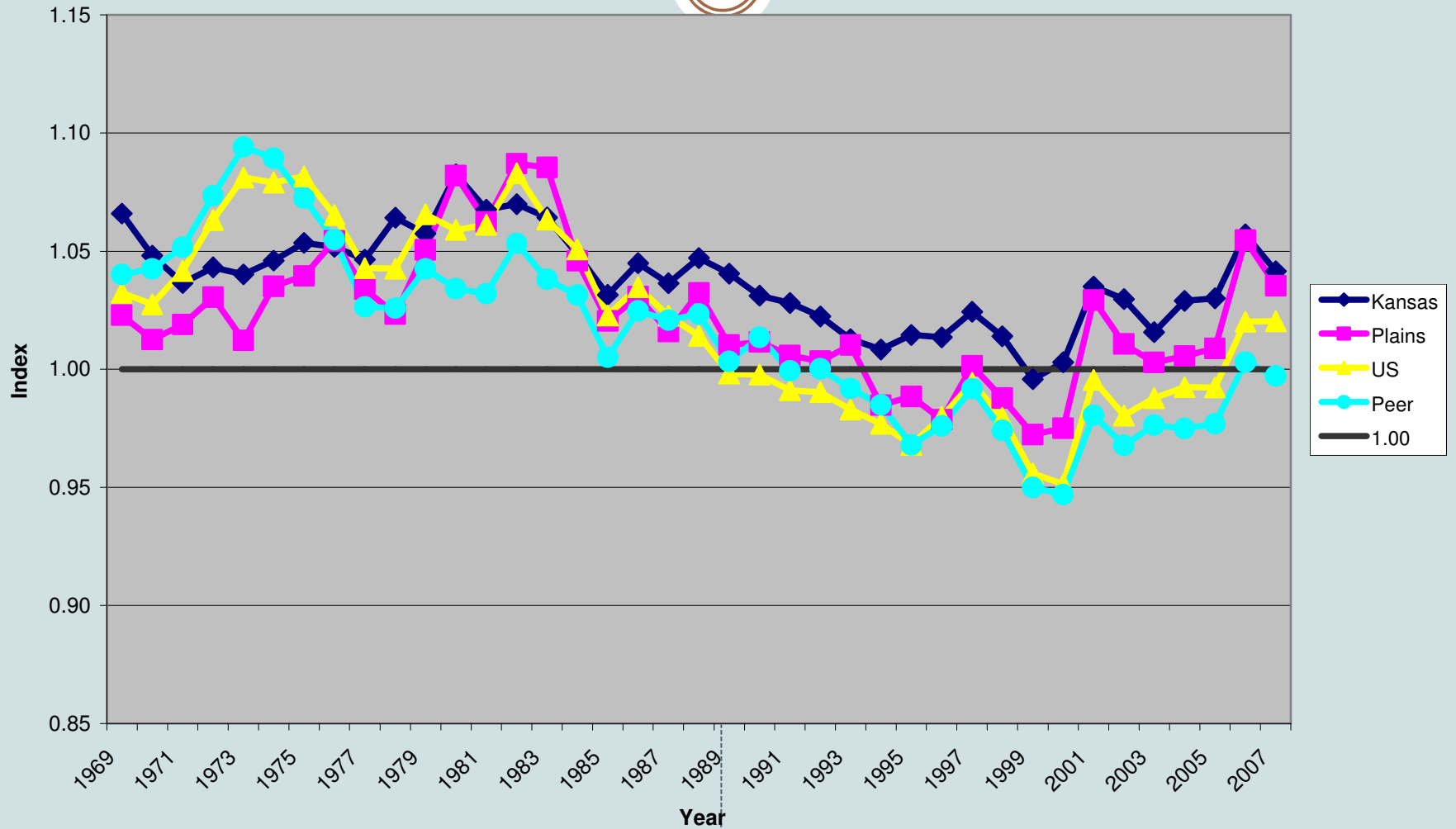


WORK/RESIDENCE RATIO

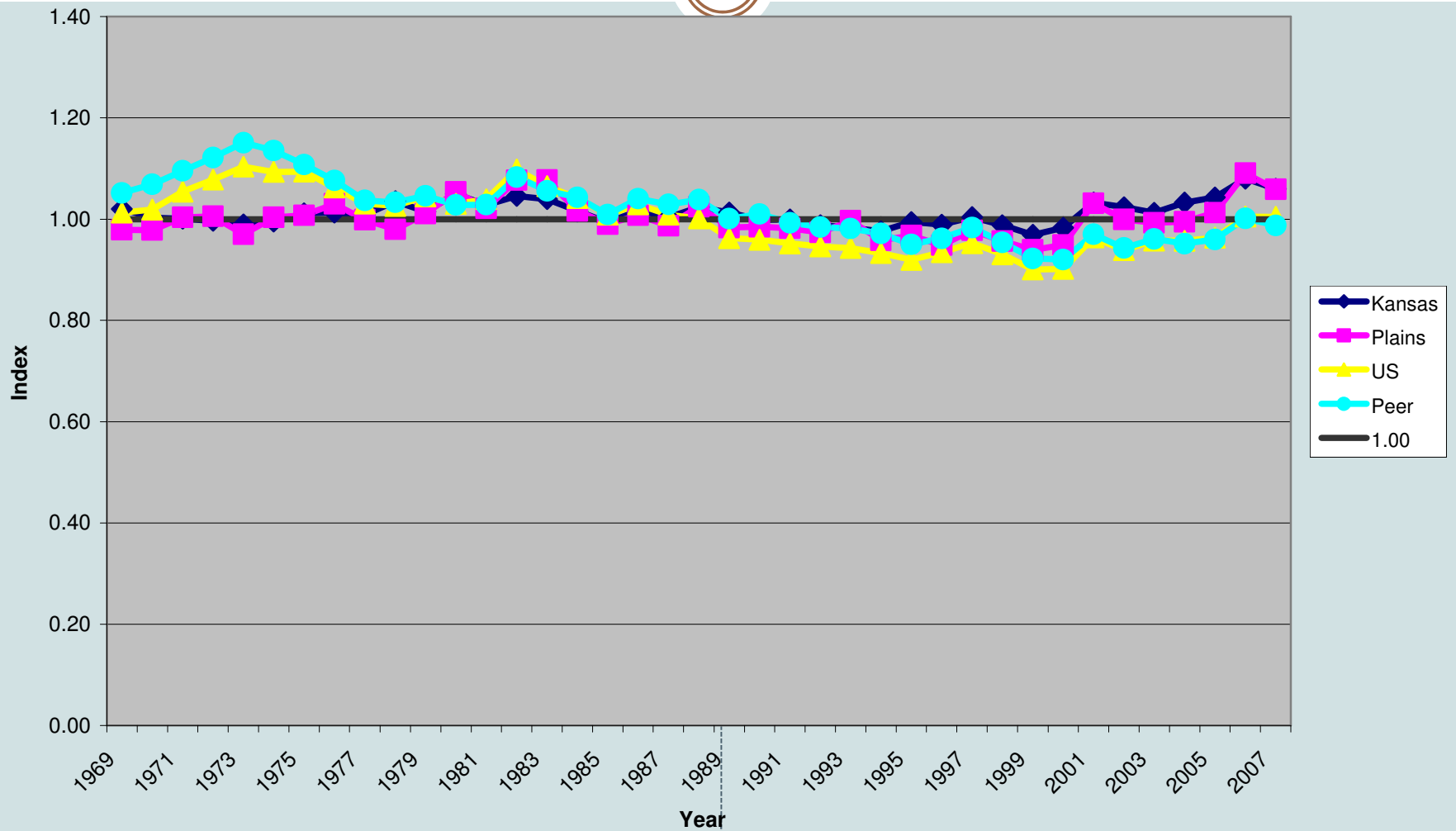
1969-2007



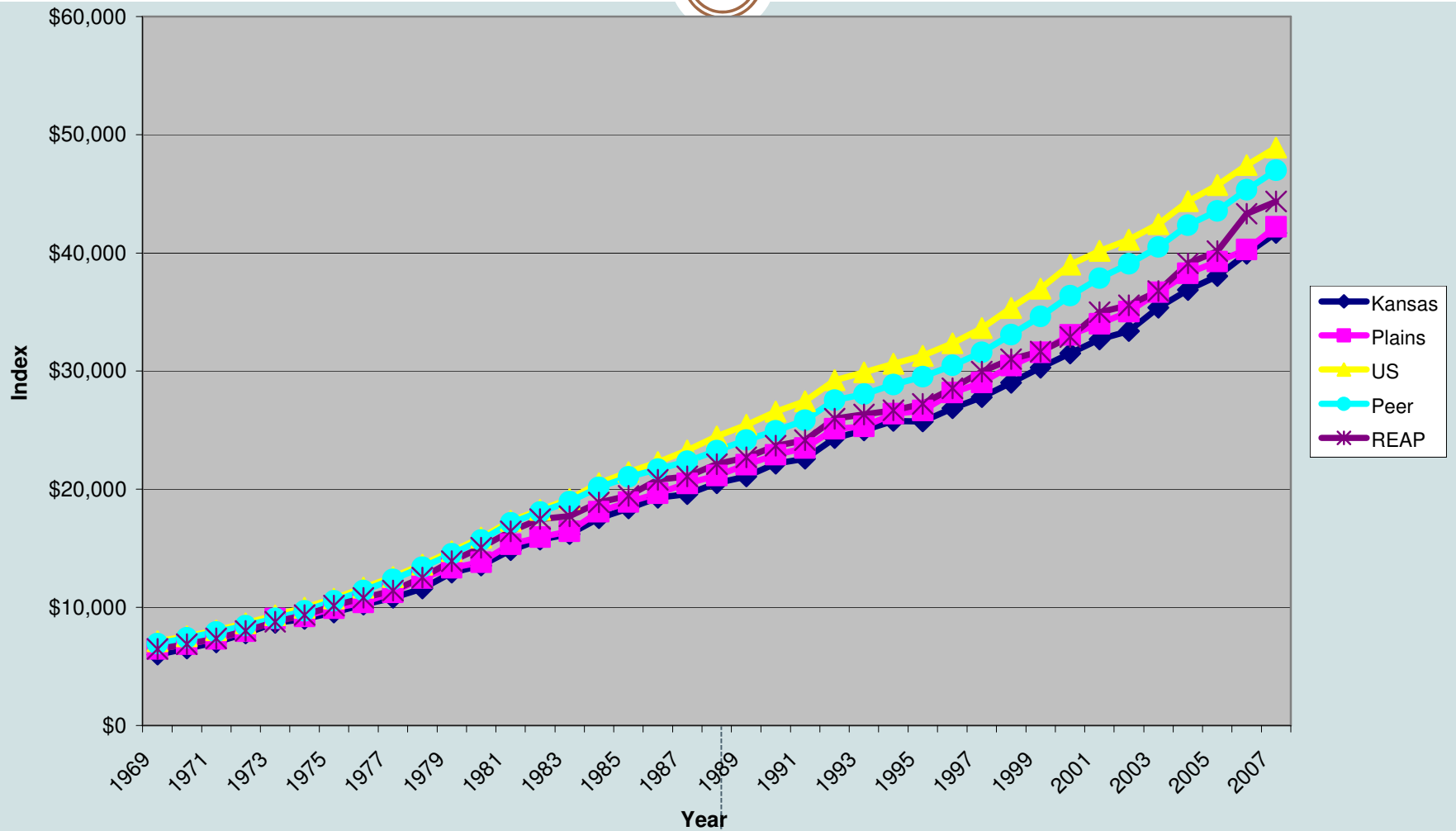
COMPOSITE INDEX 1969-2007



CORE COMPOSITE INDEX 1969-2007

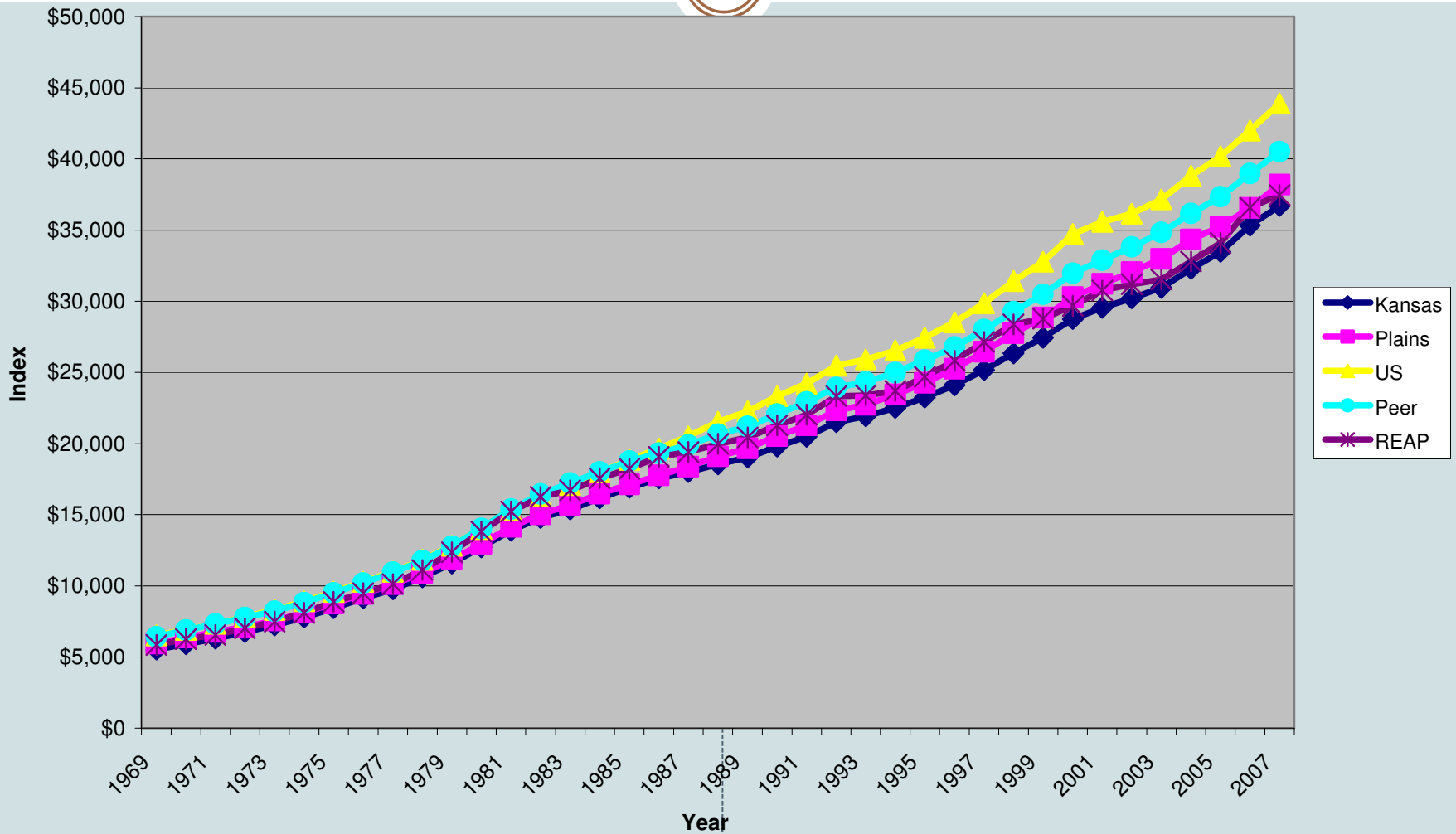


AVERAGE EARNINGS PER JOB 1969-2007



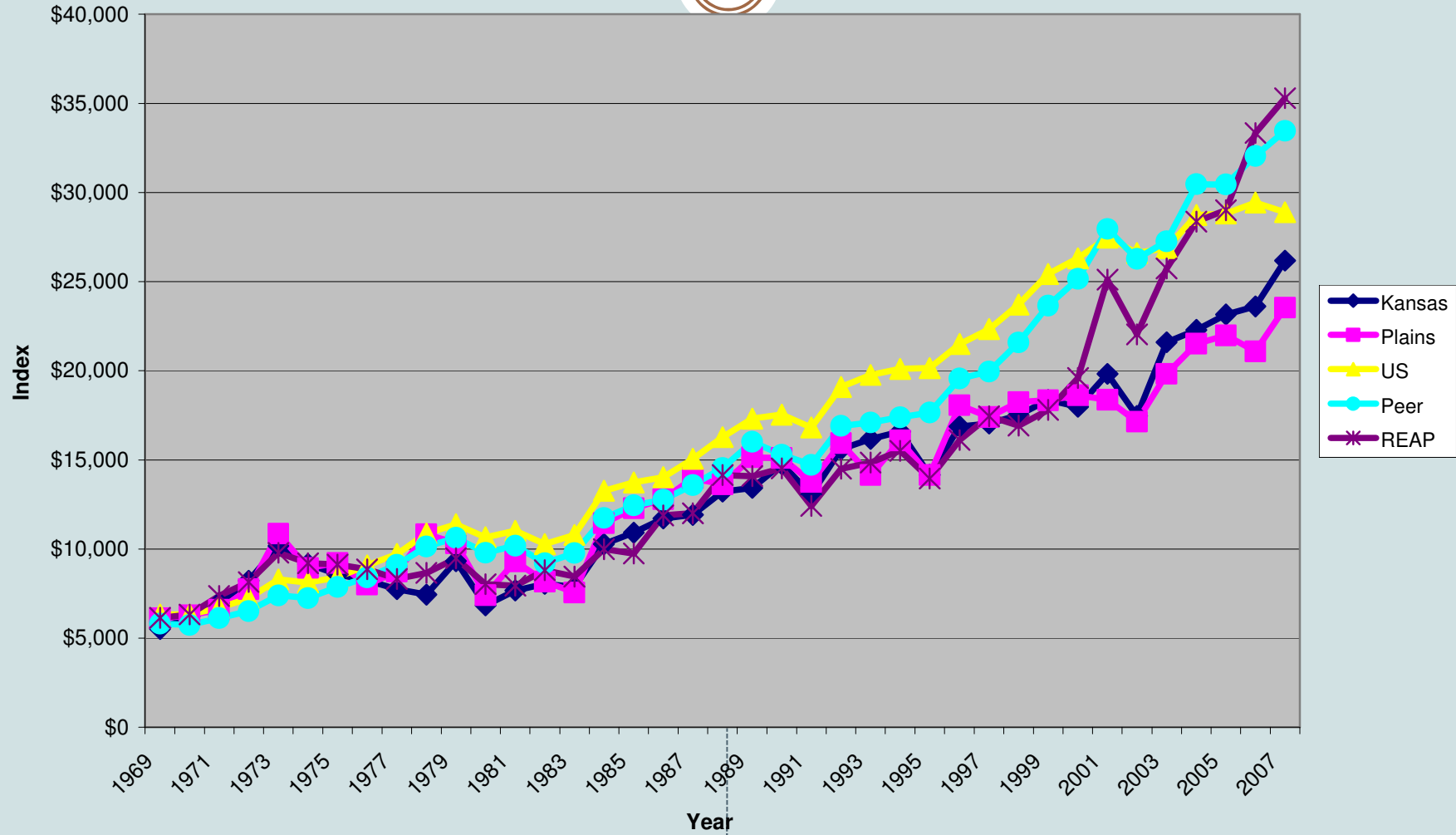
AVERAGE WAGES & SALARIES PER JOB

1969-2007

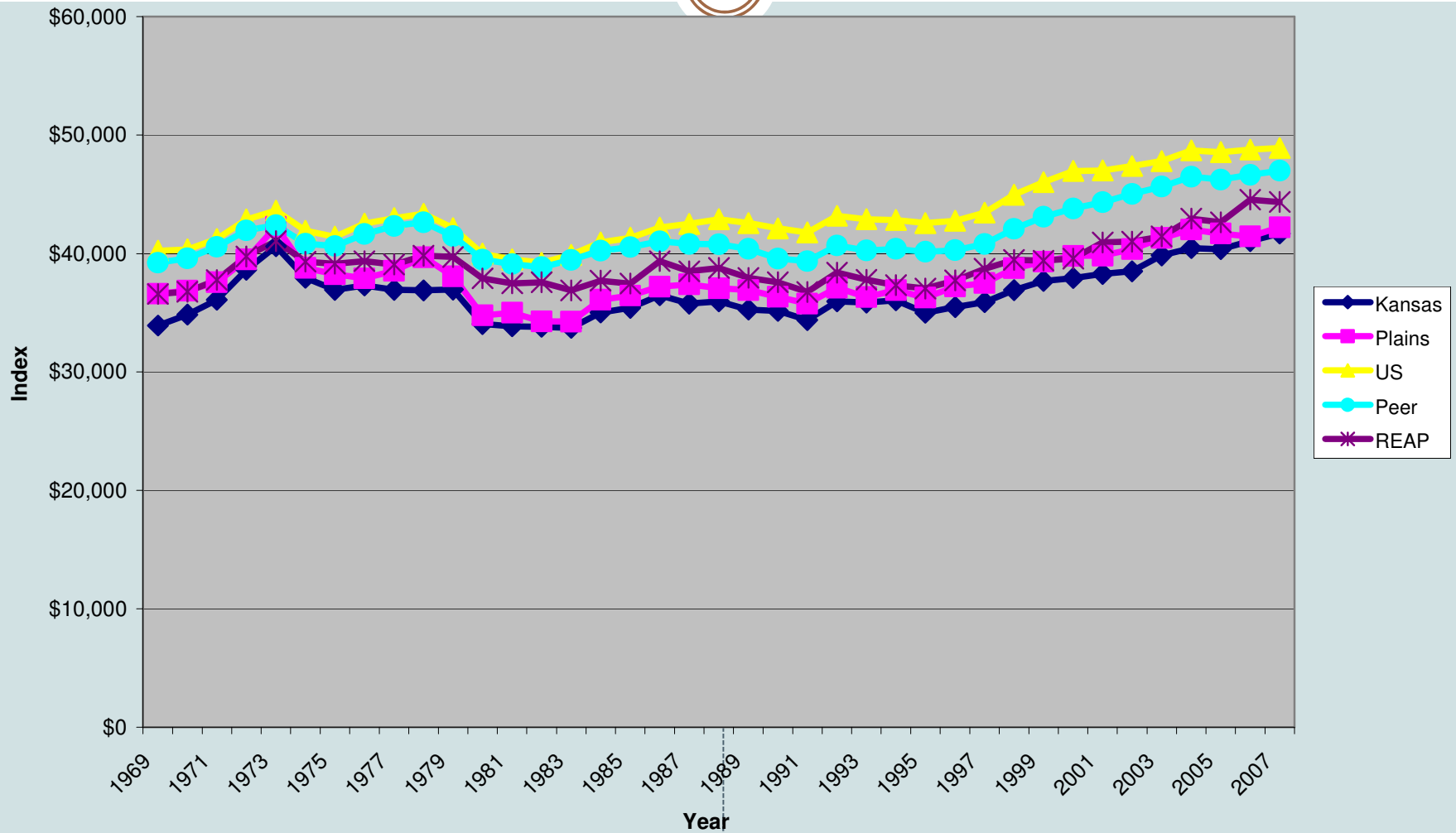


AVERAGE PROPRIETORS INCOME

1969-2007



REAL AVERAGE EARNINGS PER JOB 1969-2007



Identifying the Economic Base



- The industries that account for the largest share of employment or earnings are not necessarily the same as those that underpin growth in the local economy
- The industries that are most crucial to local economic growth are those that produce goods and services sold outside the local economy resulting in an inflow of income

Location Quotient Analysis



- *Location quotient*—A ratio that compares the percentage of industry employment in the local economy to the percentage of industry employment in a reference economy
- Location quotient analysis indicates which industries have a comparatively larger presence in the local economy

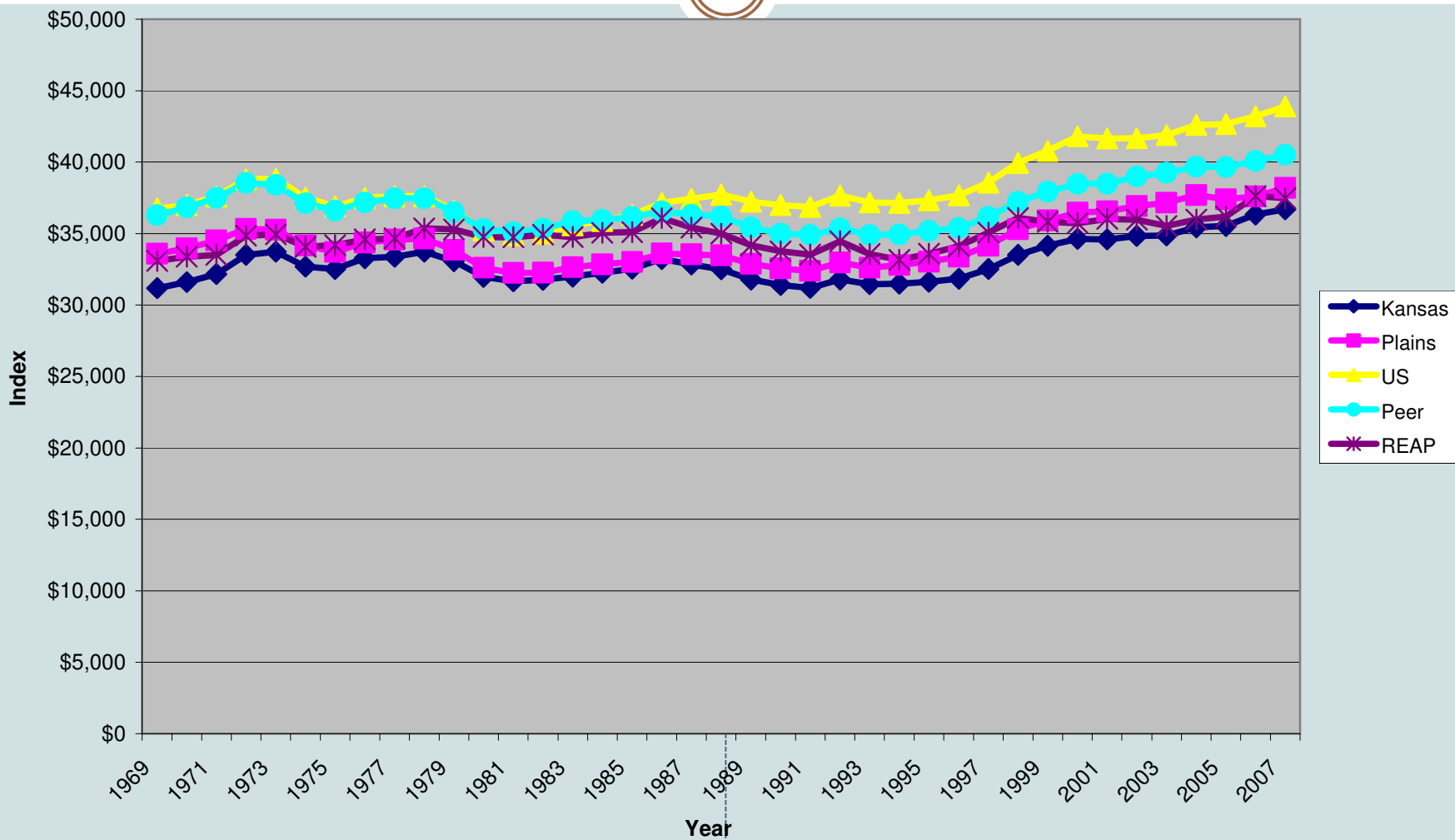
Basic and Nonbasic Industries



- *Basic industries*—Industries with a location quotient greater than one are considered basic industries because they have the potential to export products out of the local economy
- *Nonbasic industries*—Industries with a location quotient less than one are considered nonbasic industries because they only have the ability to supply local demands for their product

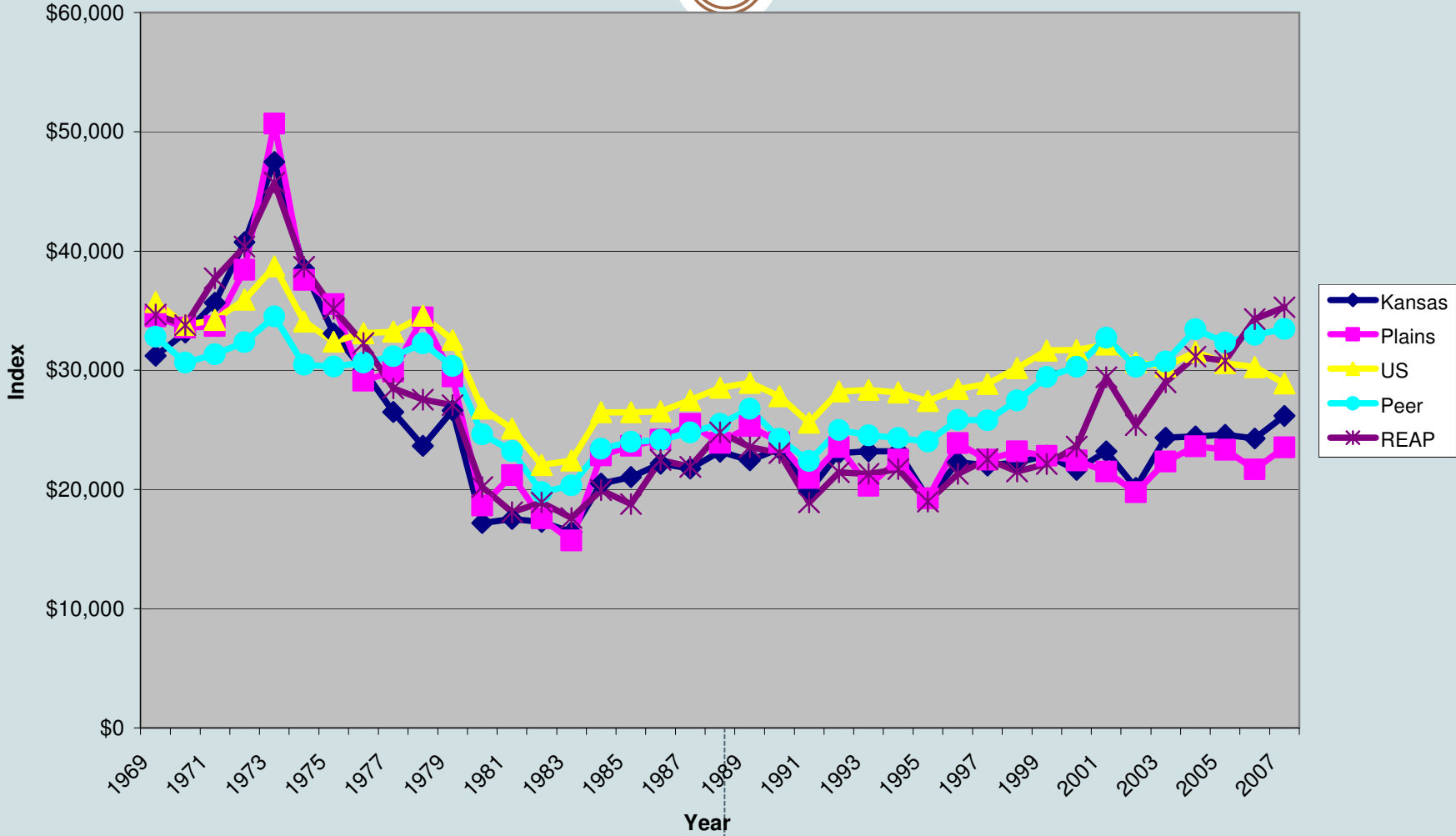
REAL AVERAGE WAGES & SALARIES PER JOB

1969-2007

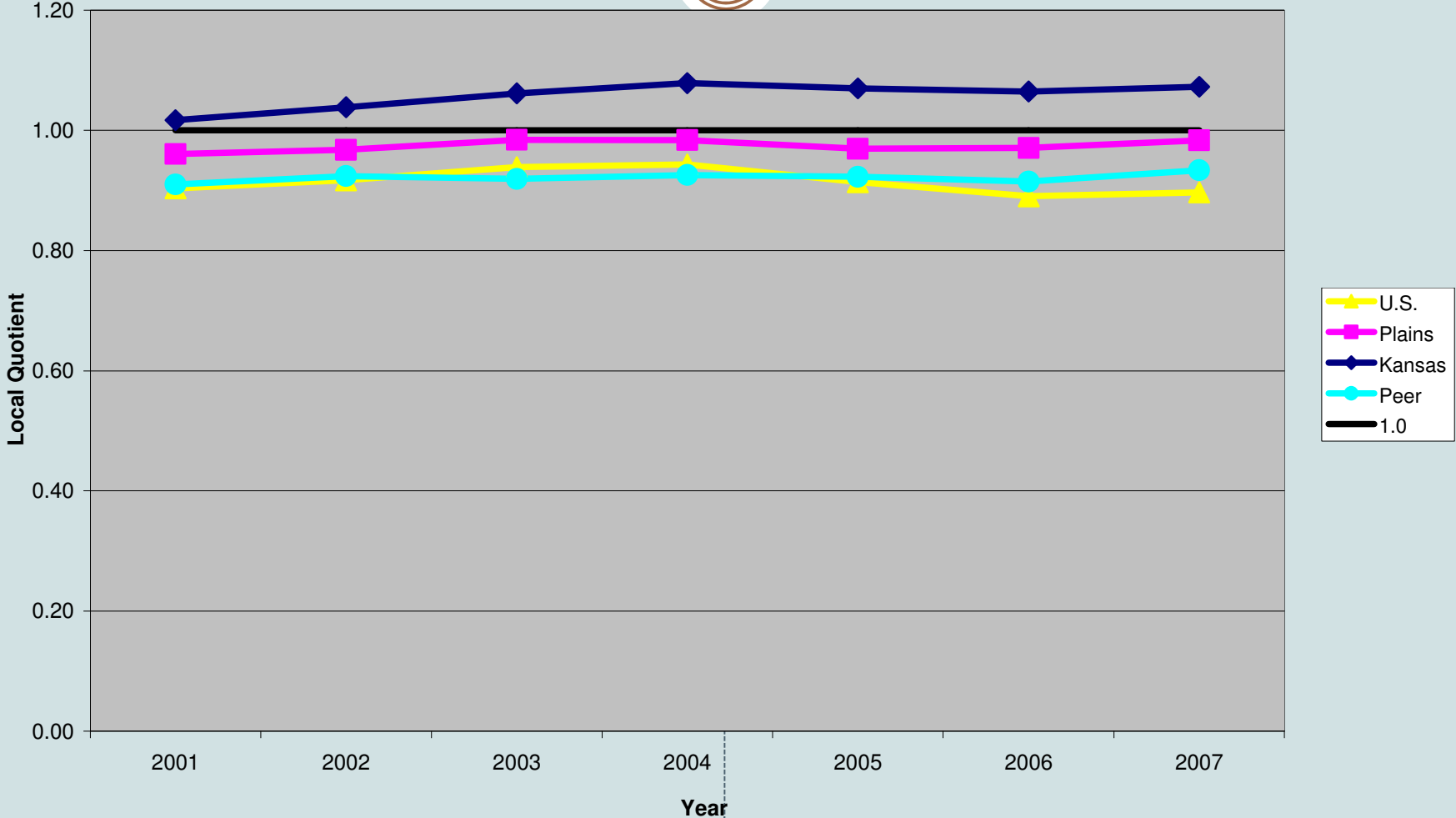


REAL AVERAGE PROPRIETORS INCOME

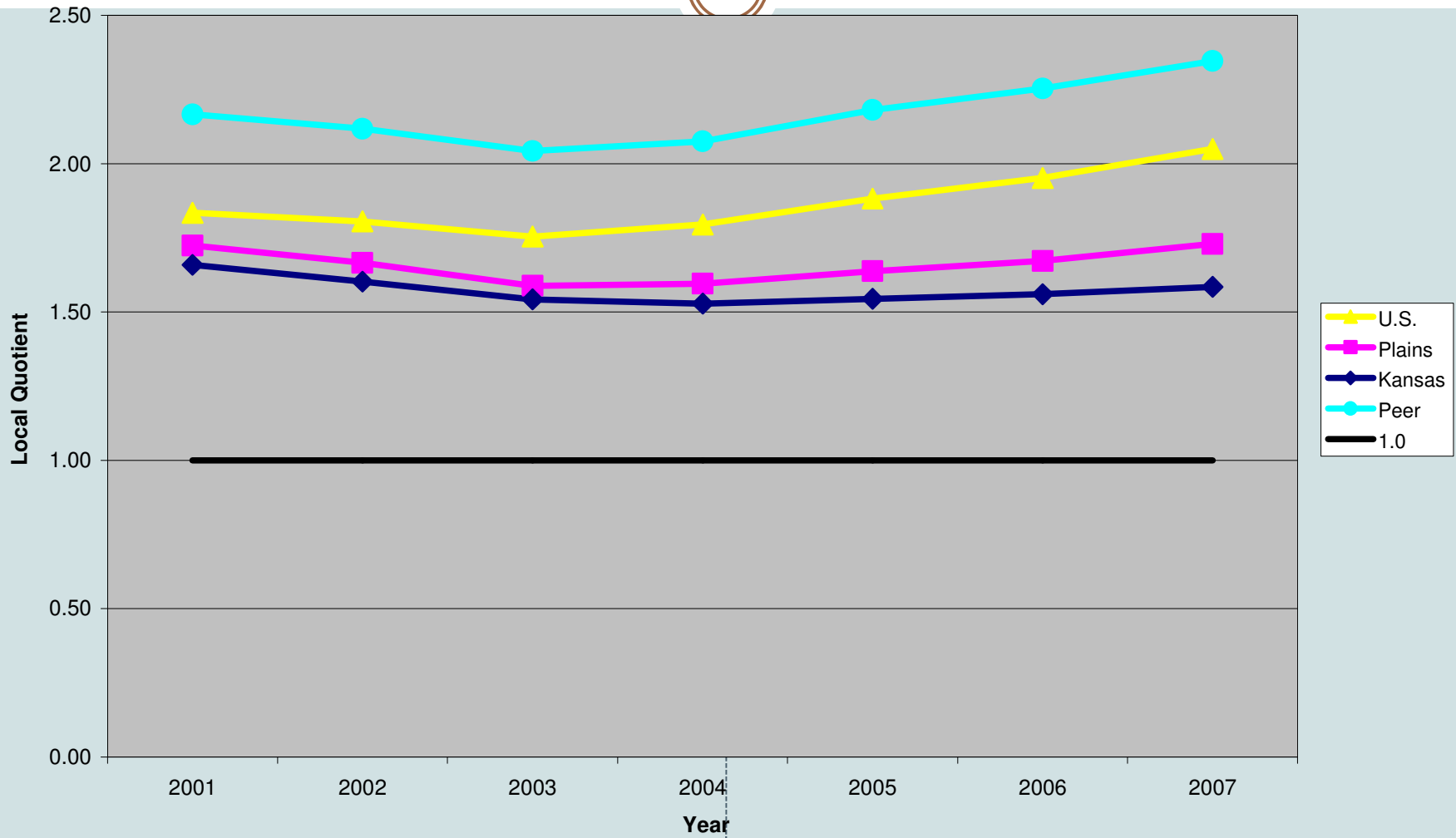
1969-2007



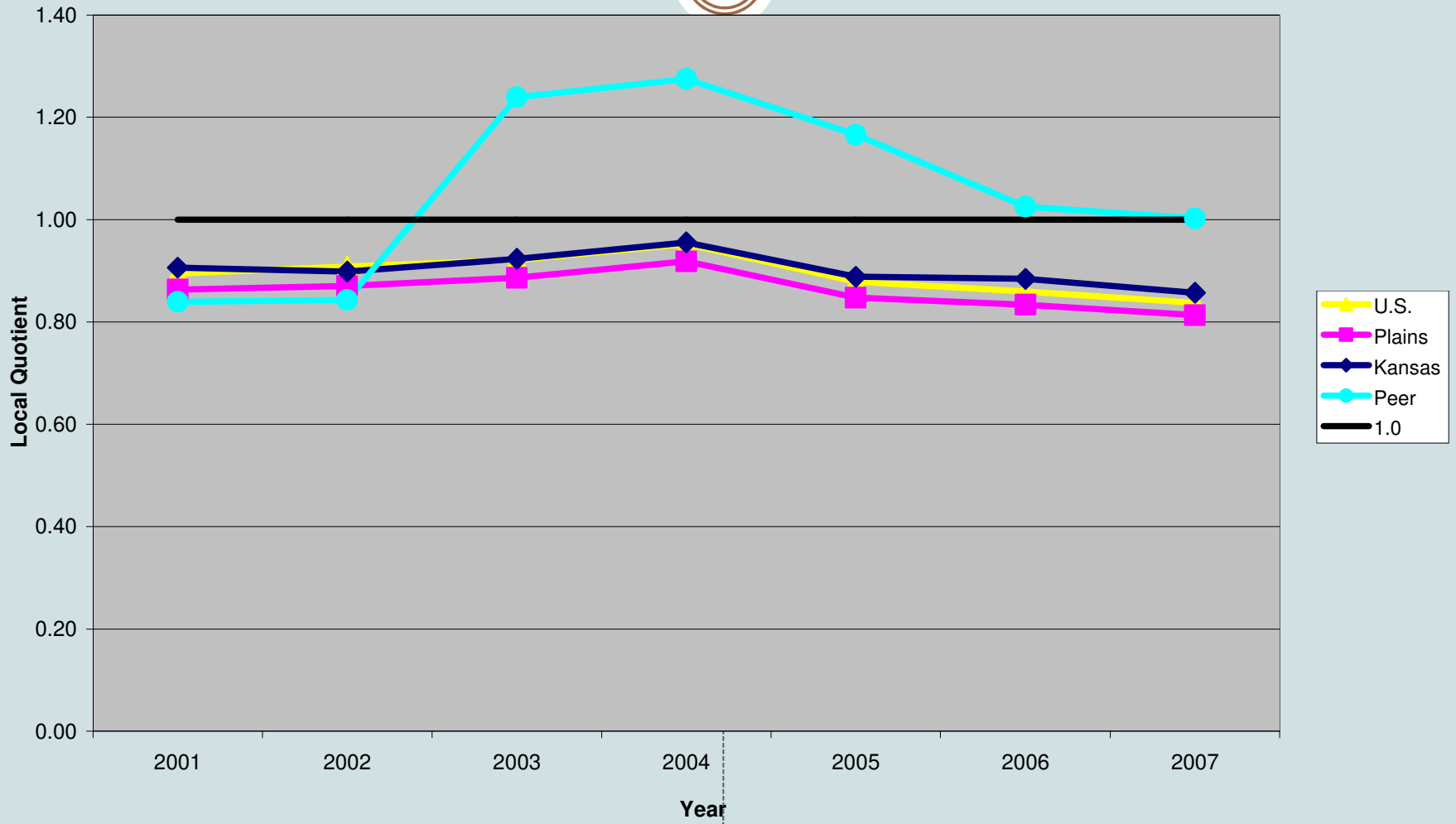
CONSTRUCTION LOCATION QUOTIENTS 2001-2007



MANUFACTURING LOCATION QUOTIENTS 2001-2007



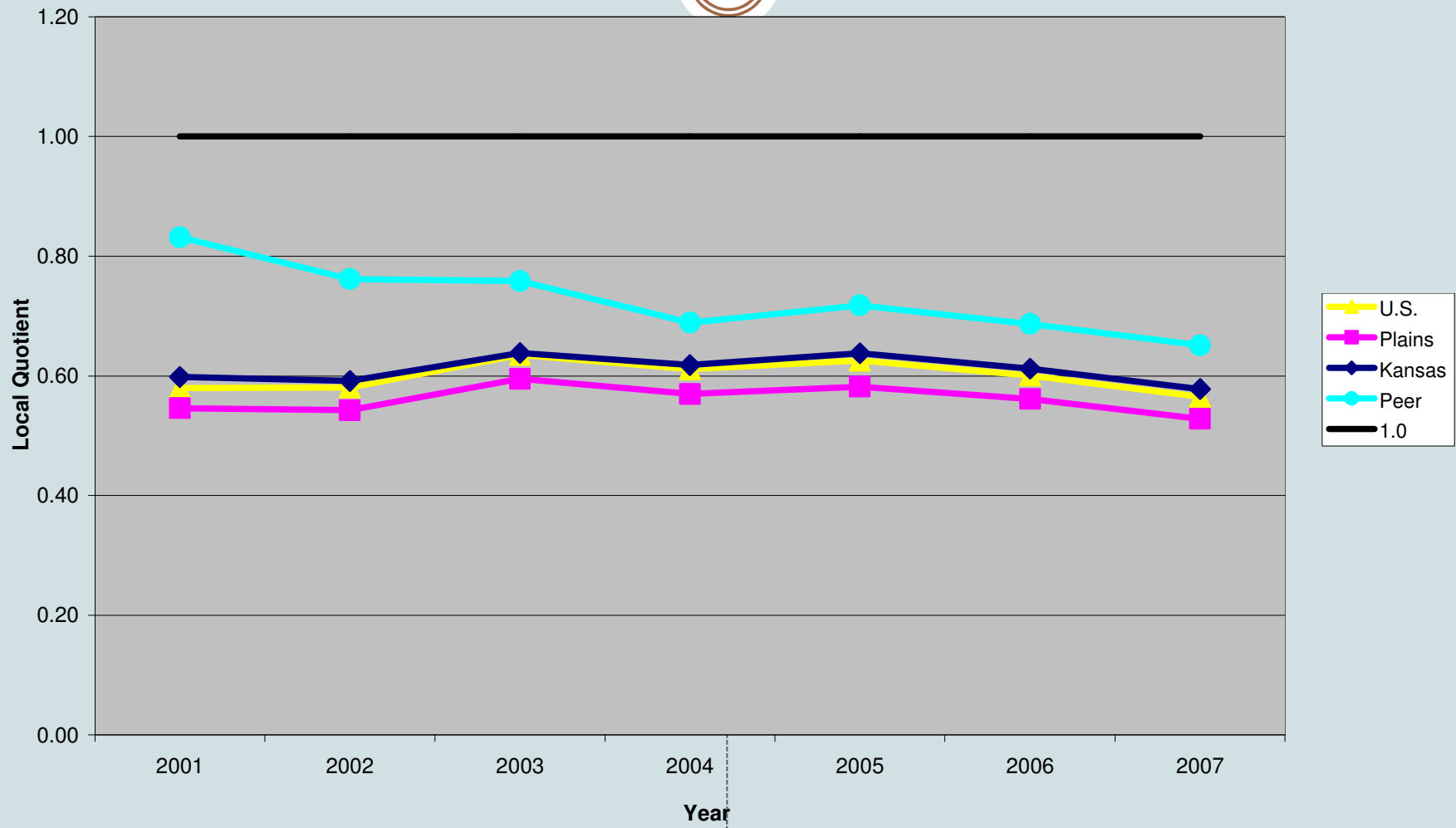
WHOLESALE TRADE LOCATION QUOTIENTS 2001-2007



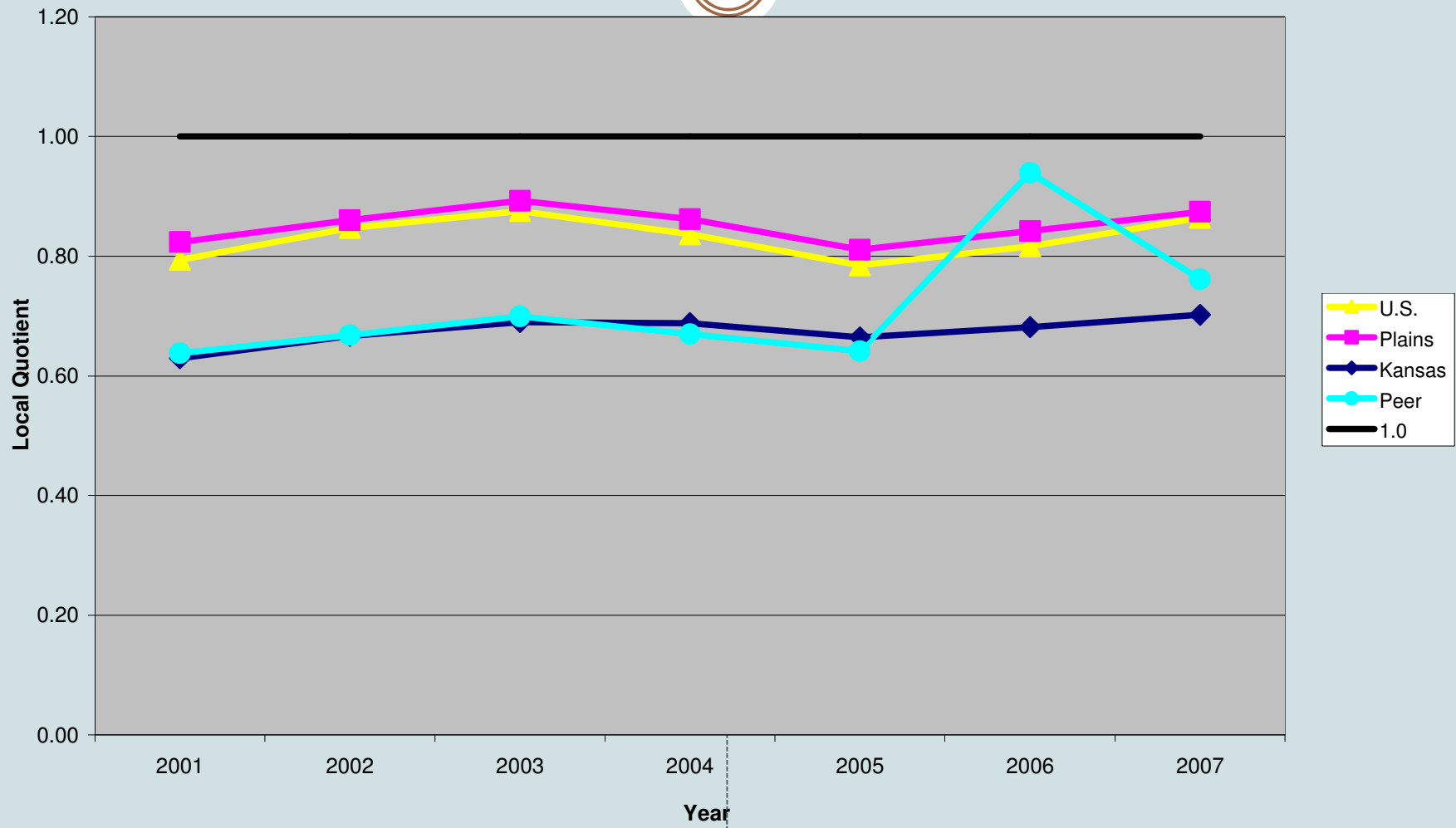
RETAIL TRADE LOCATION QUOTIENTS 2001-2007



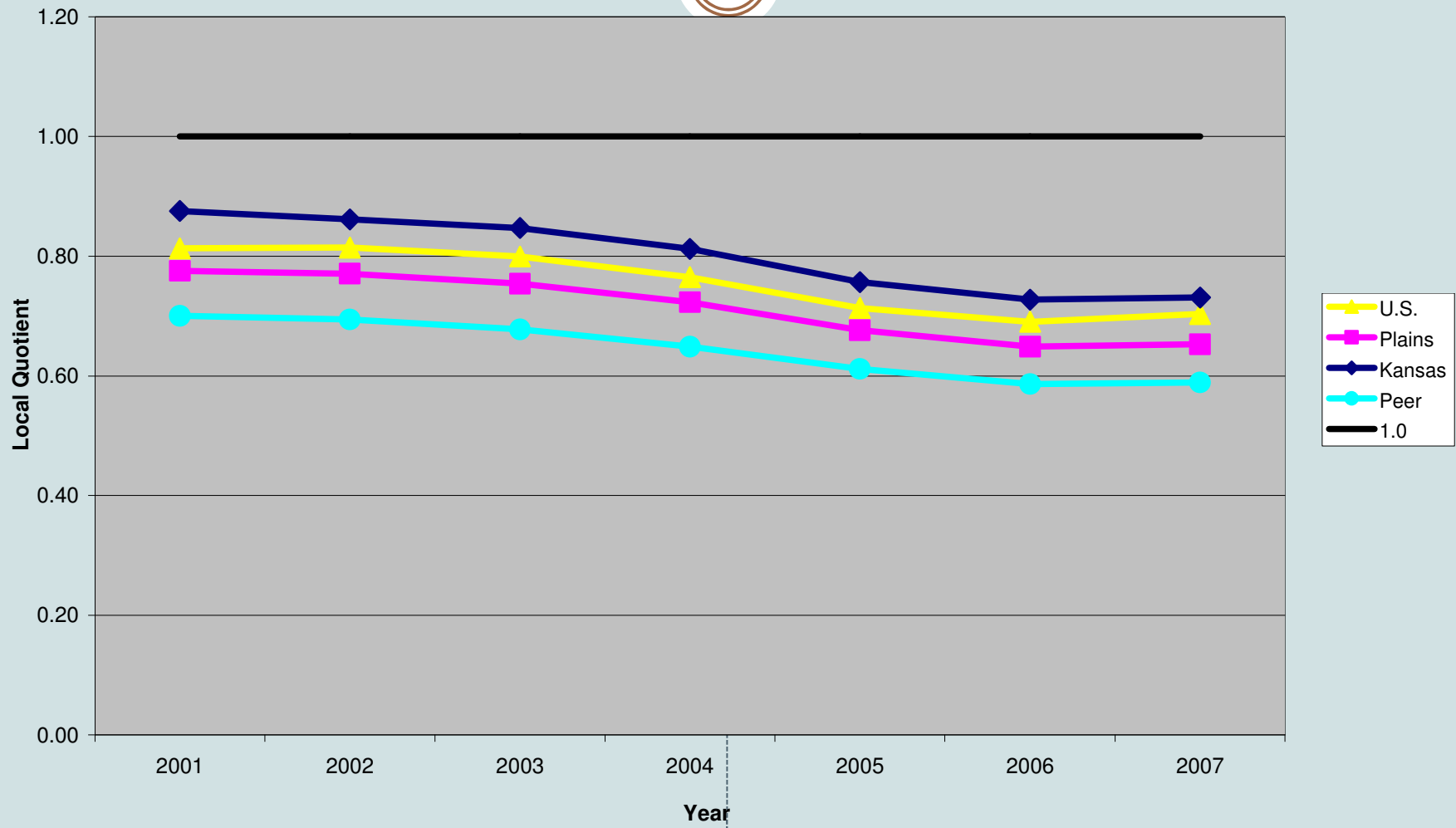
TRANSPORTATION & WAREHOUSING LOCATION QUOTIENTS 2001-2007



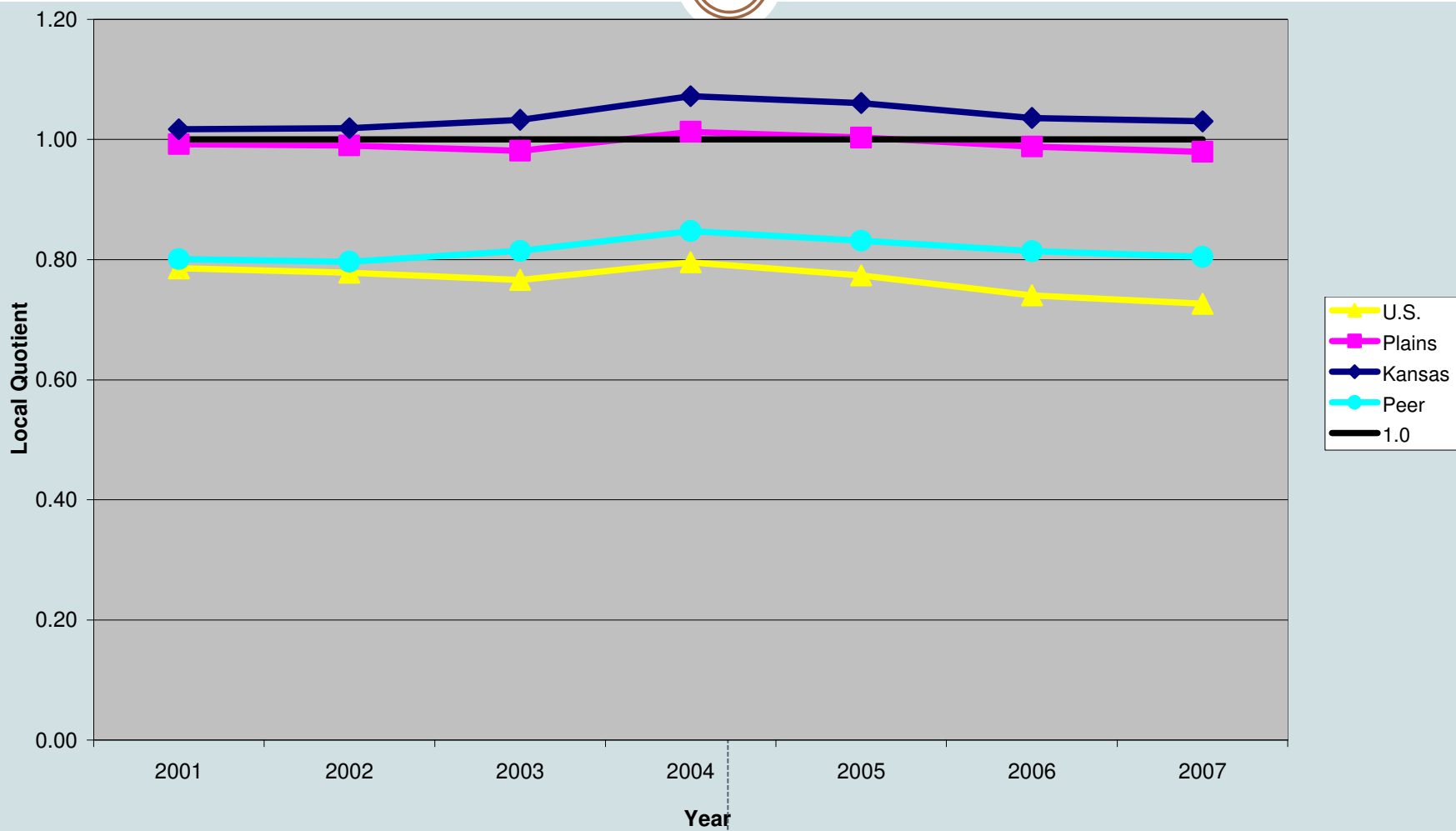
INFORMATION LOCATION QUOTIENTS 2001-2007



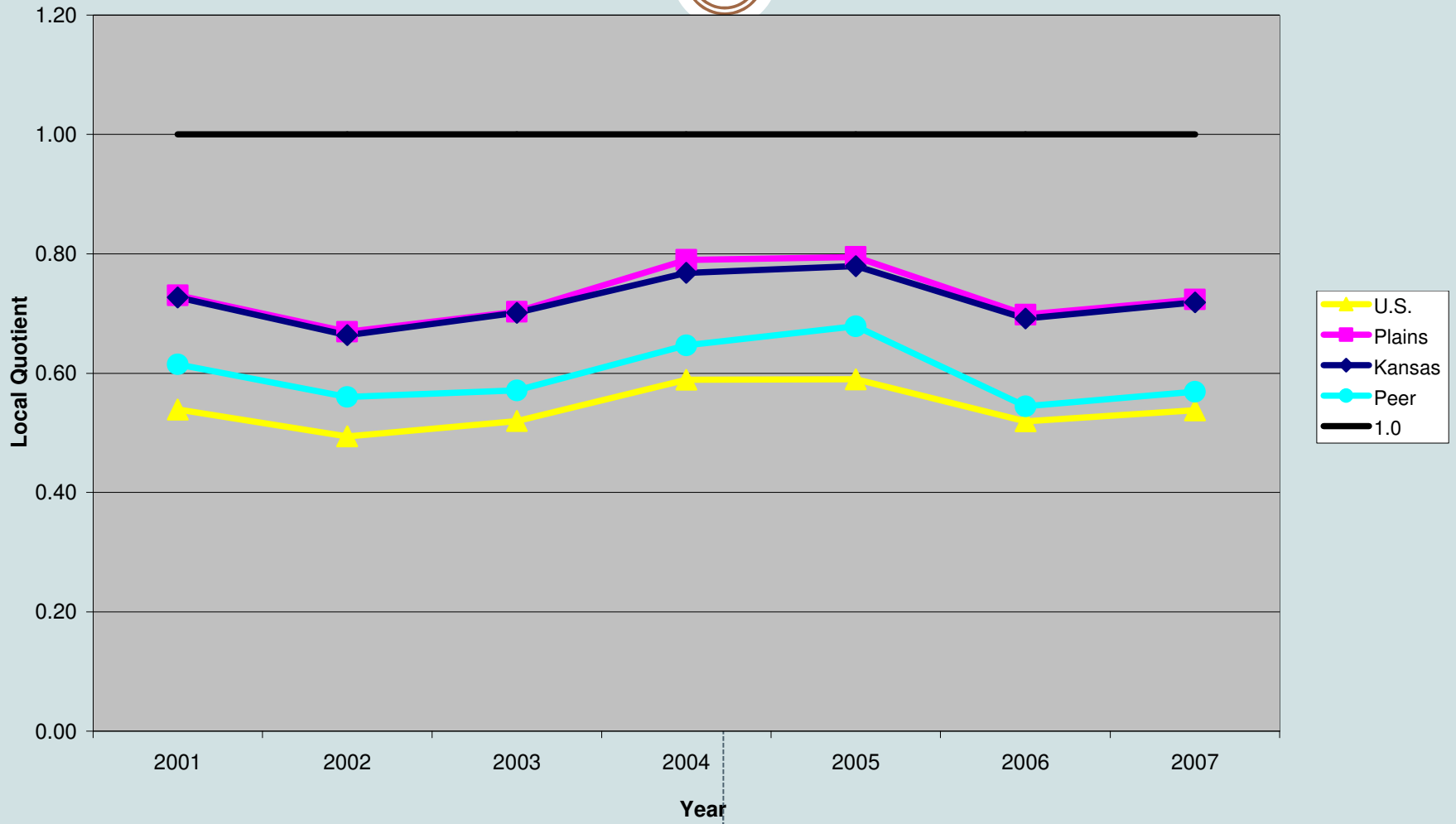
FINANCE & INSURANCE LOCATION QUOTIENTS 2001-2007



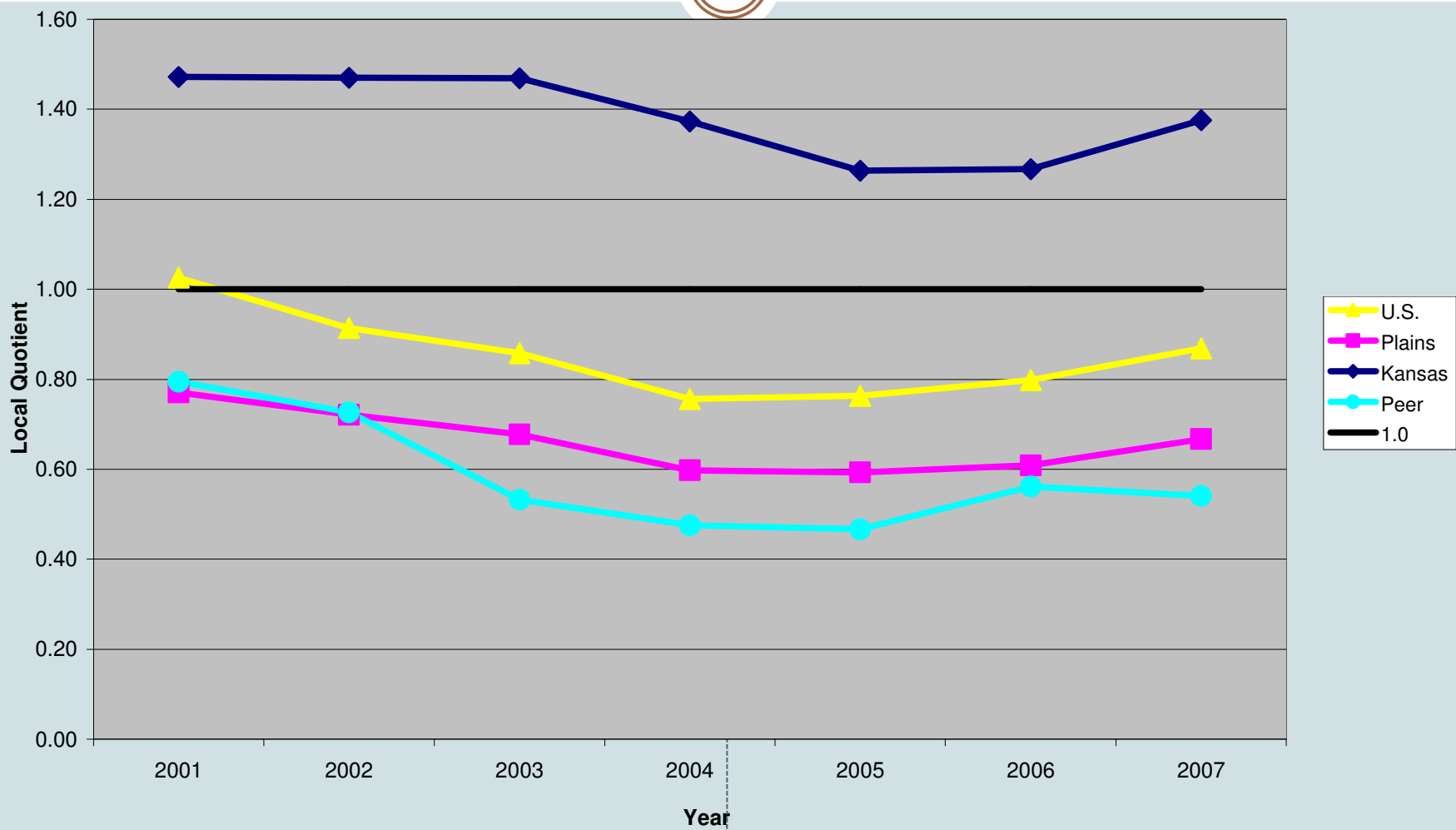
REAL ESTATE, RENTAL & LEASING LOCATION QUOTIENTS 2001-2007



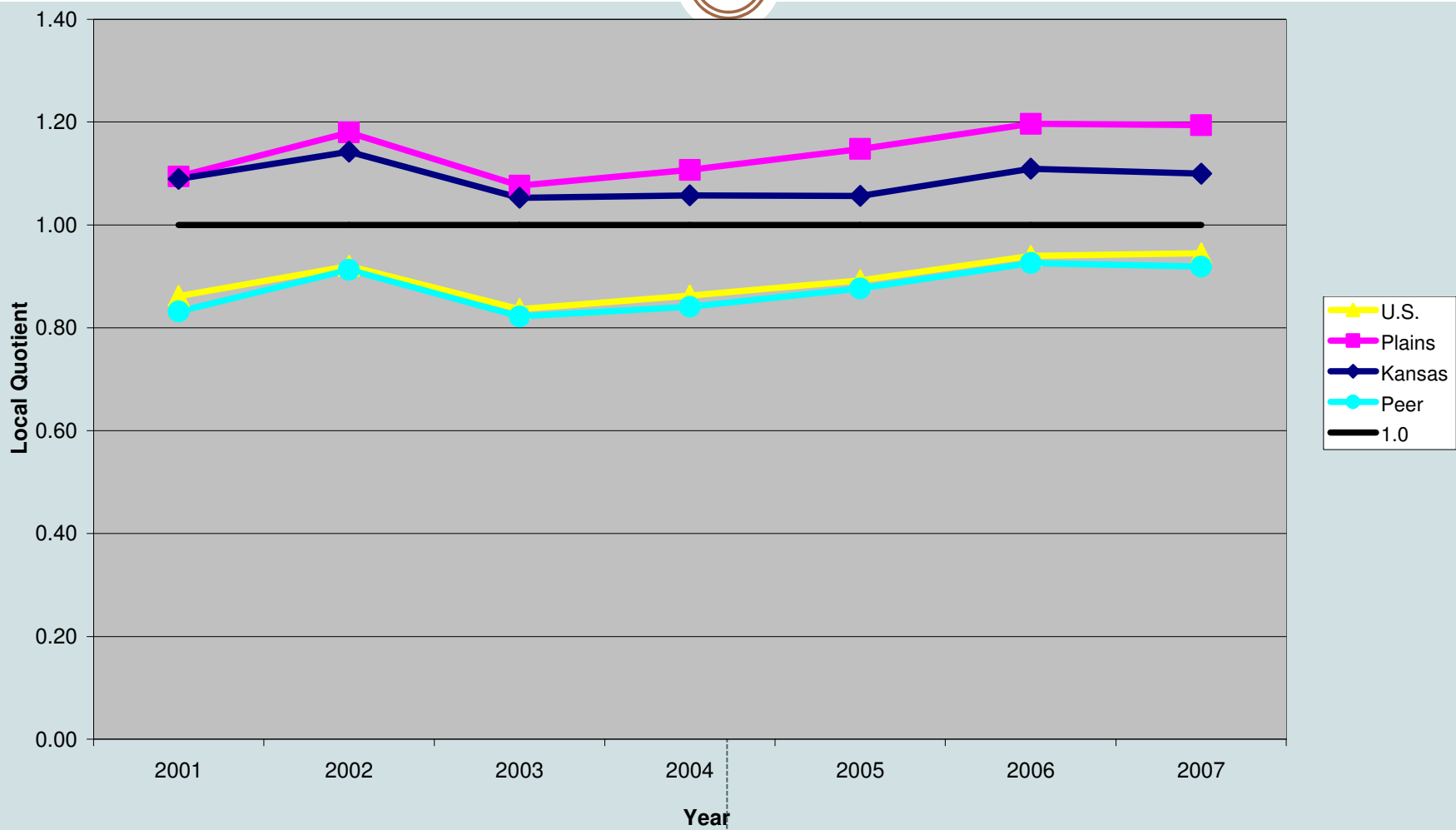
PROFESSIONAL & TECHNICAL SERVICES LOCATION QUOTIENTS 2001-2007



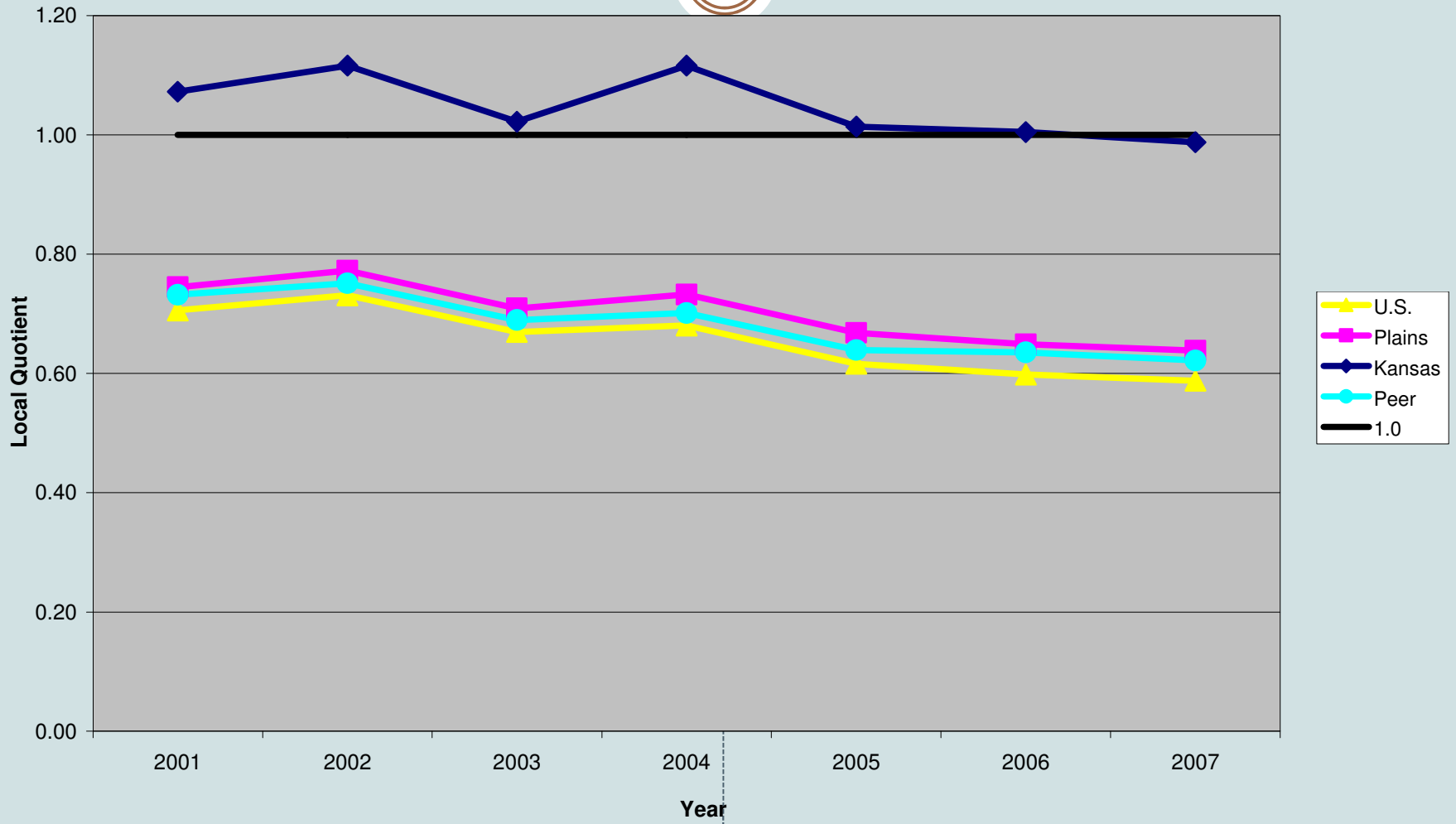
MANAGEMENT OF COMPANIES & ENTERPRISES LOCATION QUOTIENTS 2001-2007



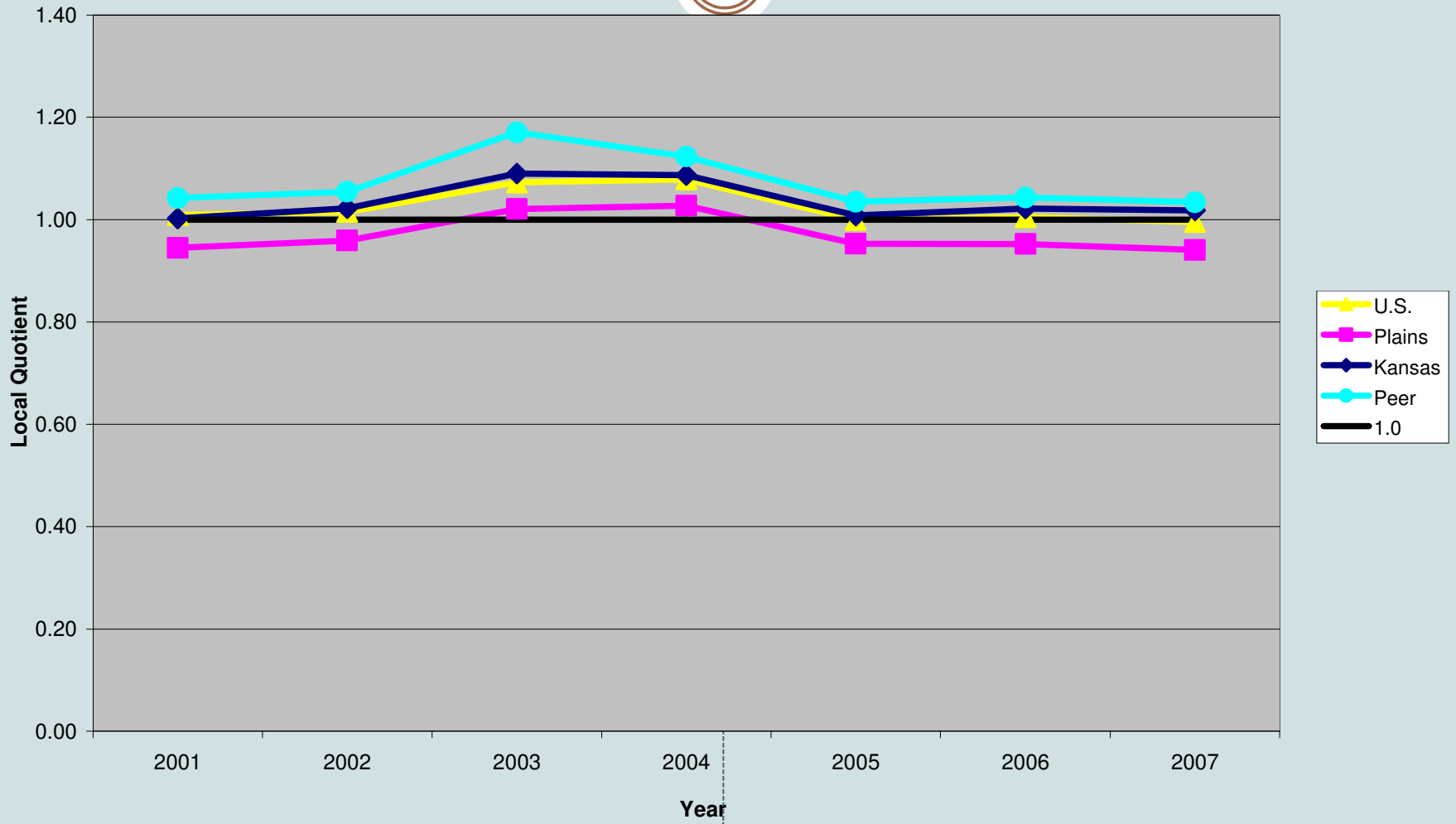
ADMINISTRATIVE & WASTE SERVICES LOCATION QUOTIENTS 2001-2007



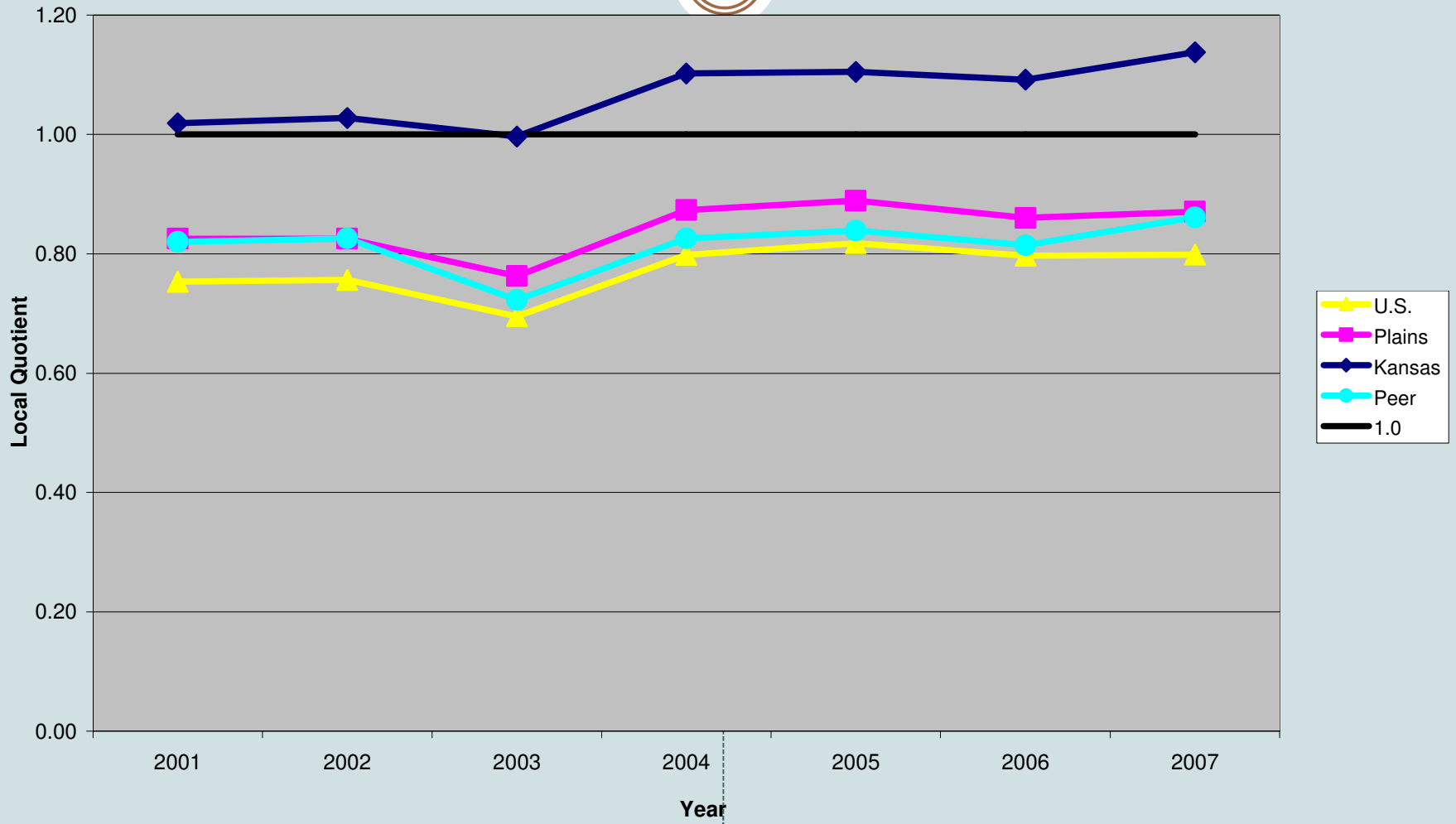
EDUCATIONAL SERVICES LOCATION QUOTIENTS 2001-2007



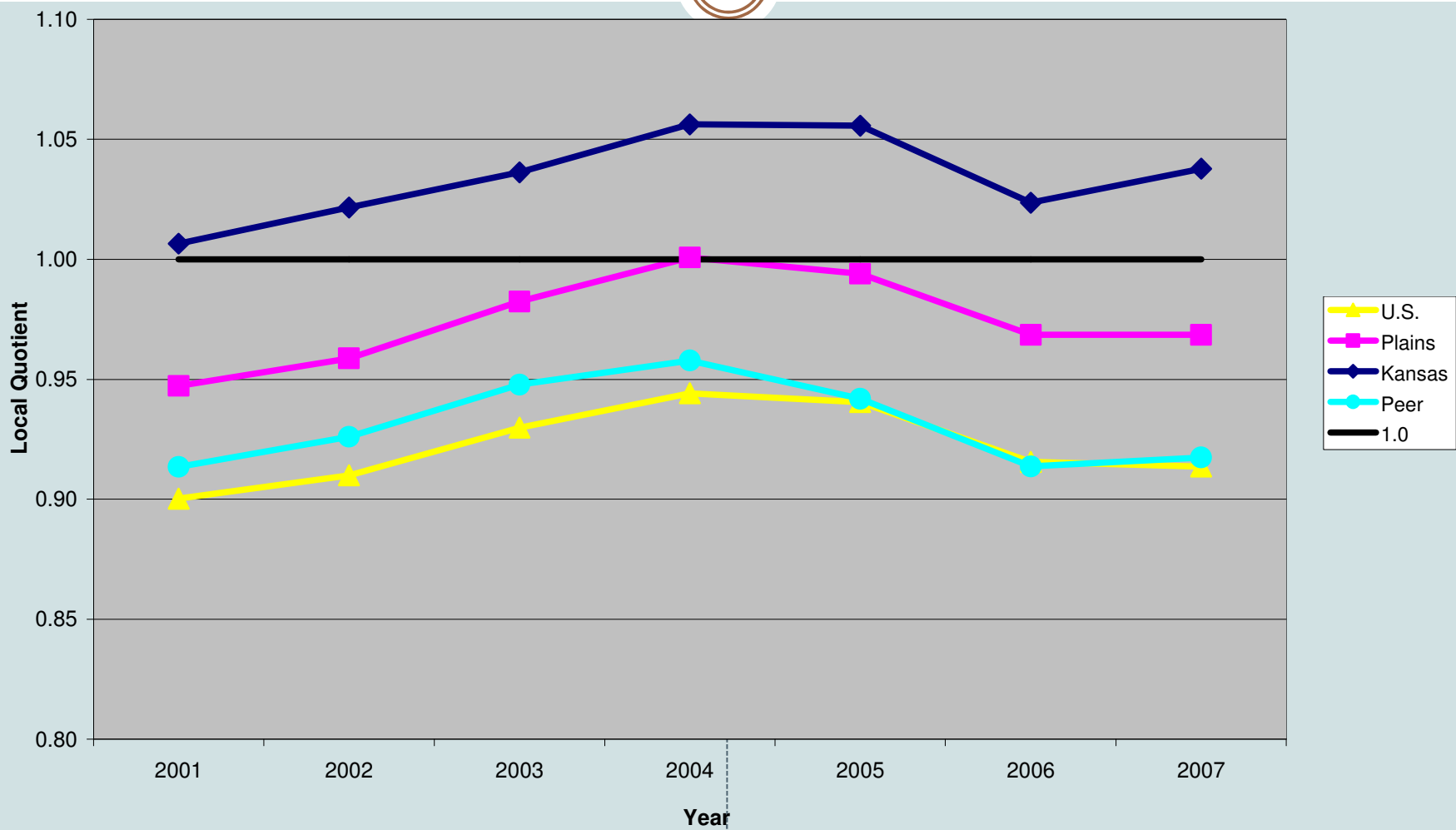
HEALTH CARE & SOCIAL ASSISTANCE LOCATION QUOTIENTS 2001-2007



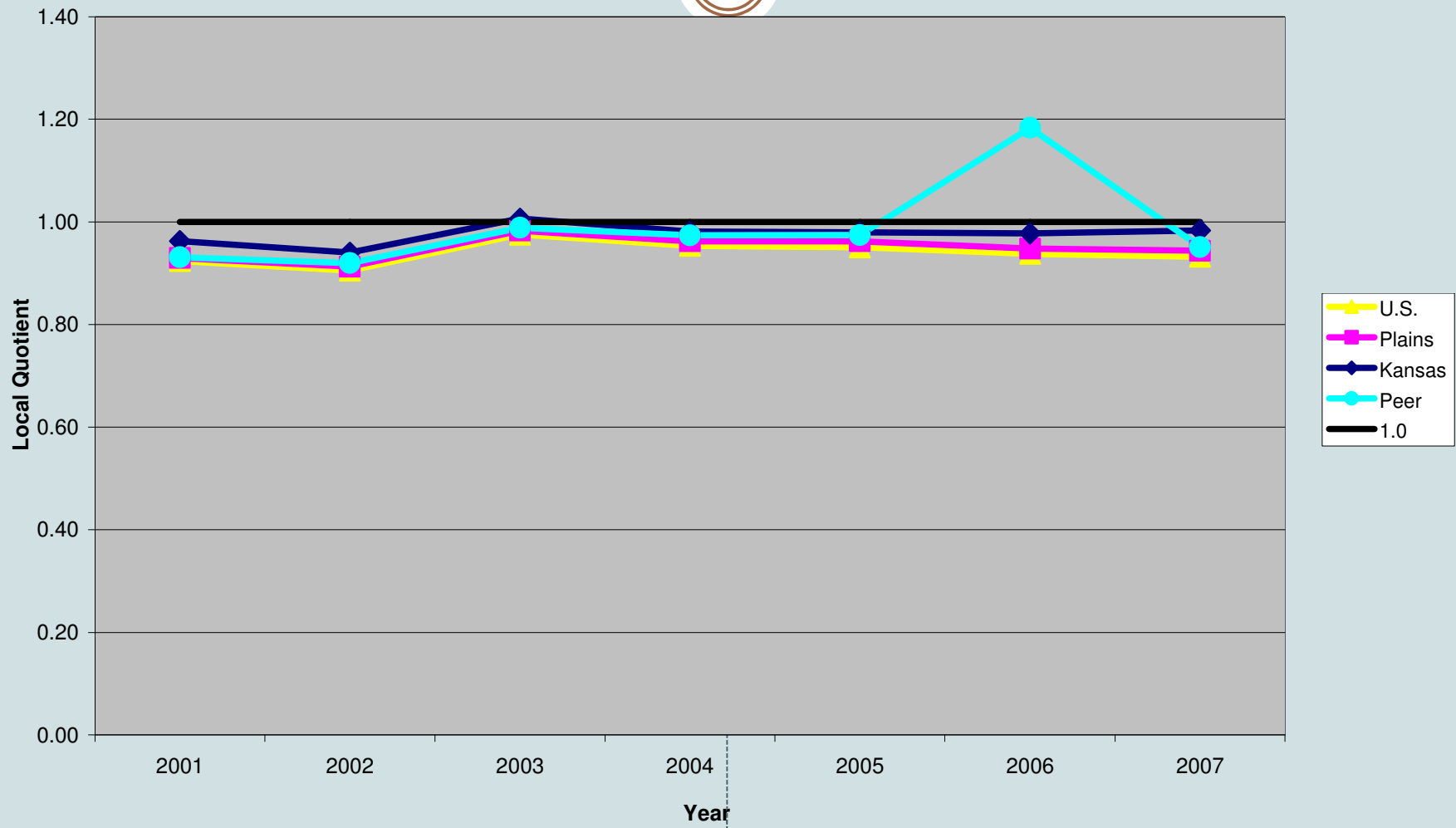
ARTS, ENTERTAINMENT & RECREATION LOCATION QUOTIENTS 2001-2007



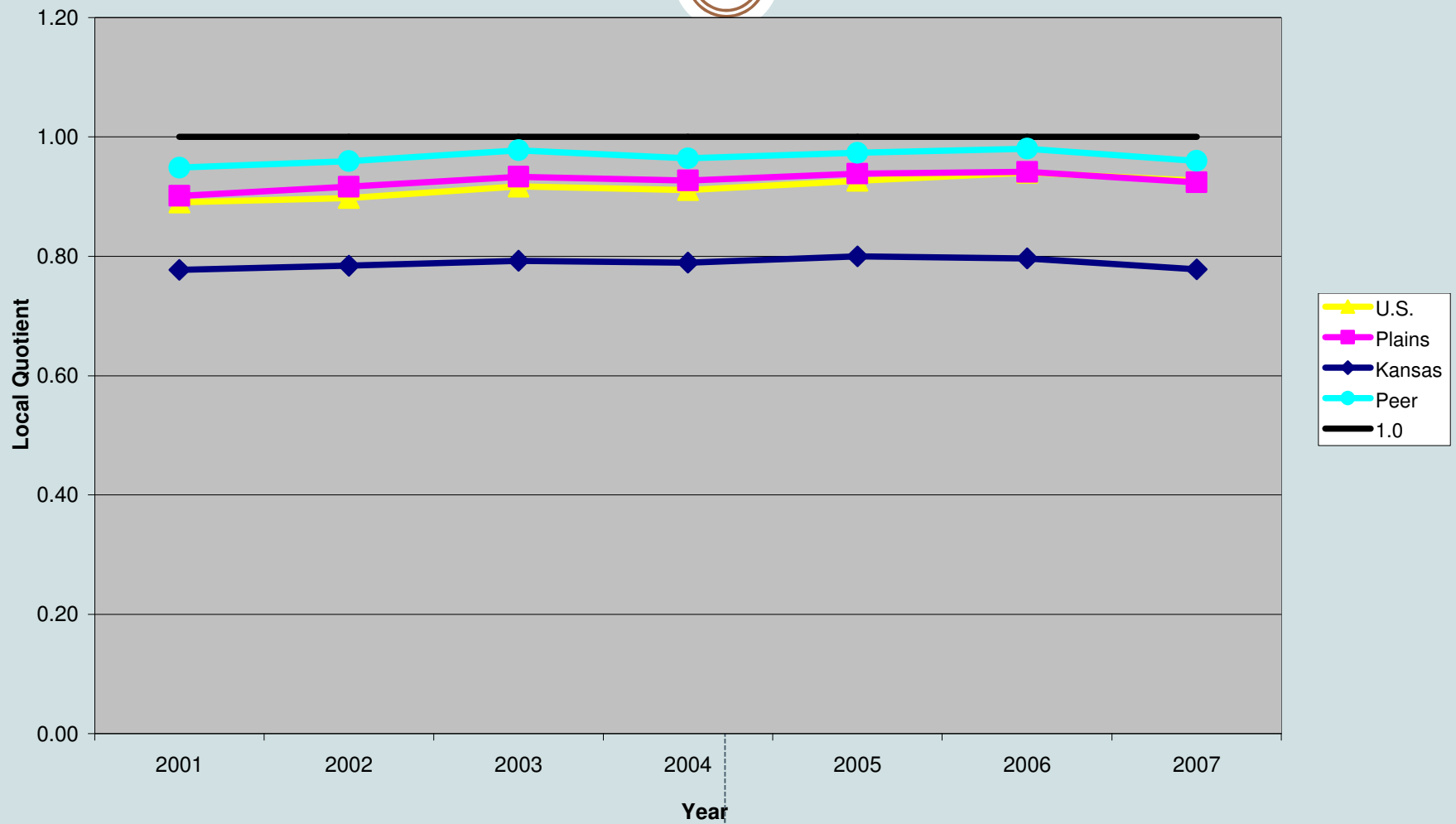
ACCOMMODATION & FOOD SERVICES LOCATION QUOTIENTS 2001-2009



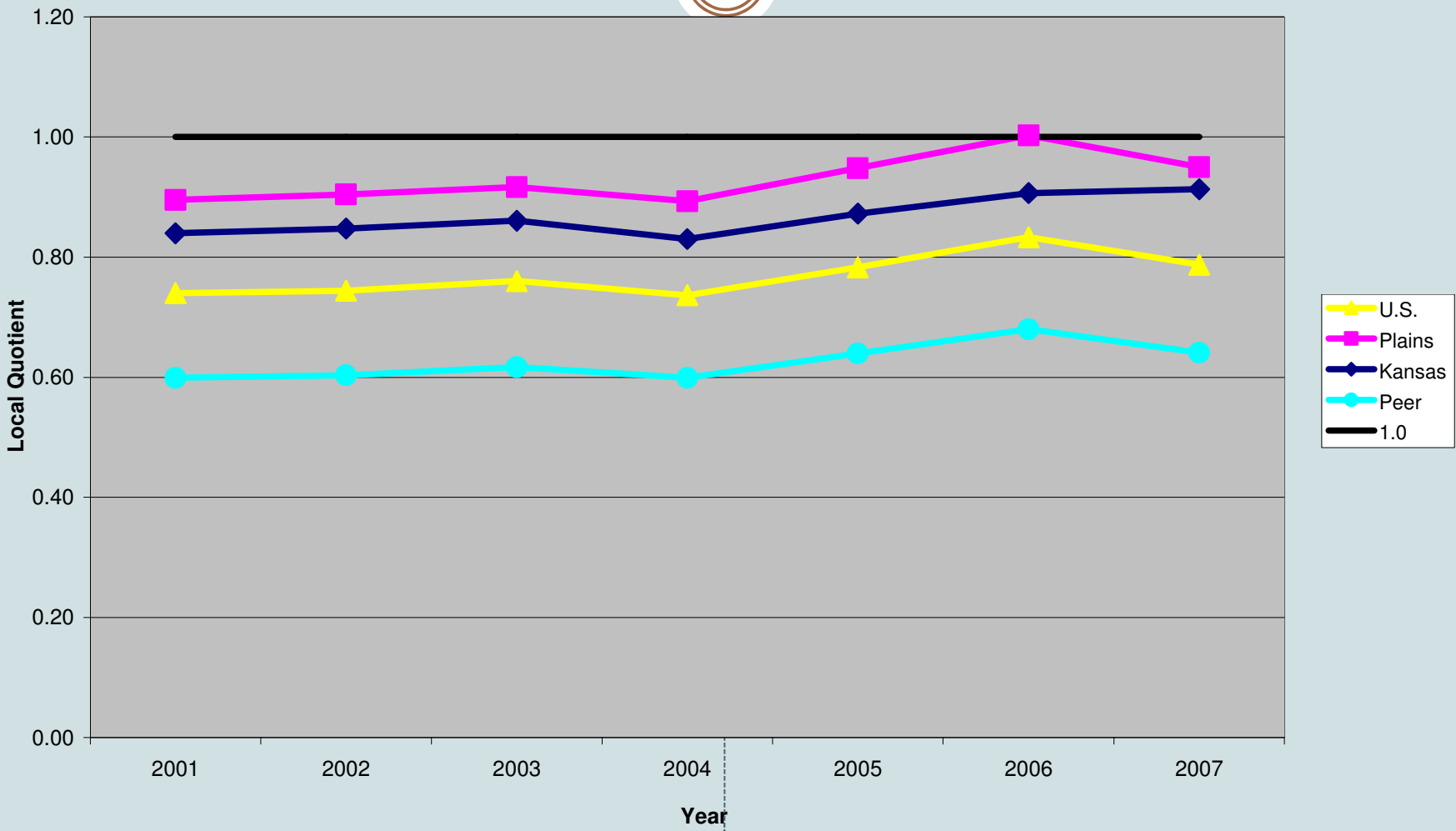
OTHER SERVICES LOCATION QUOTIENTS 2001-2007



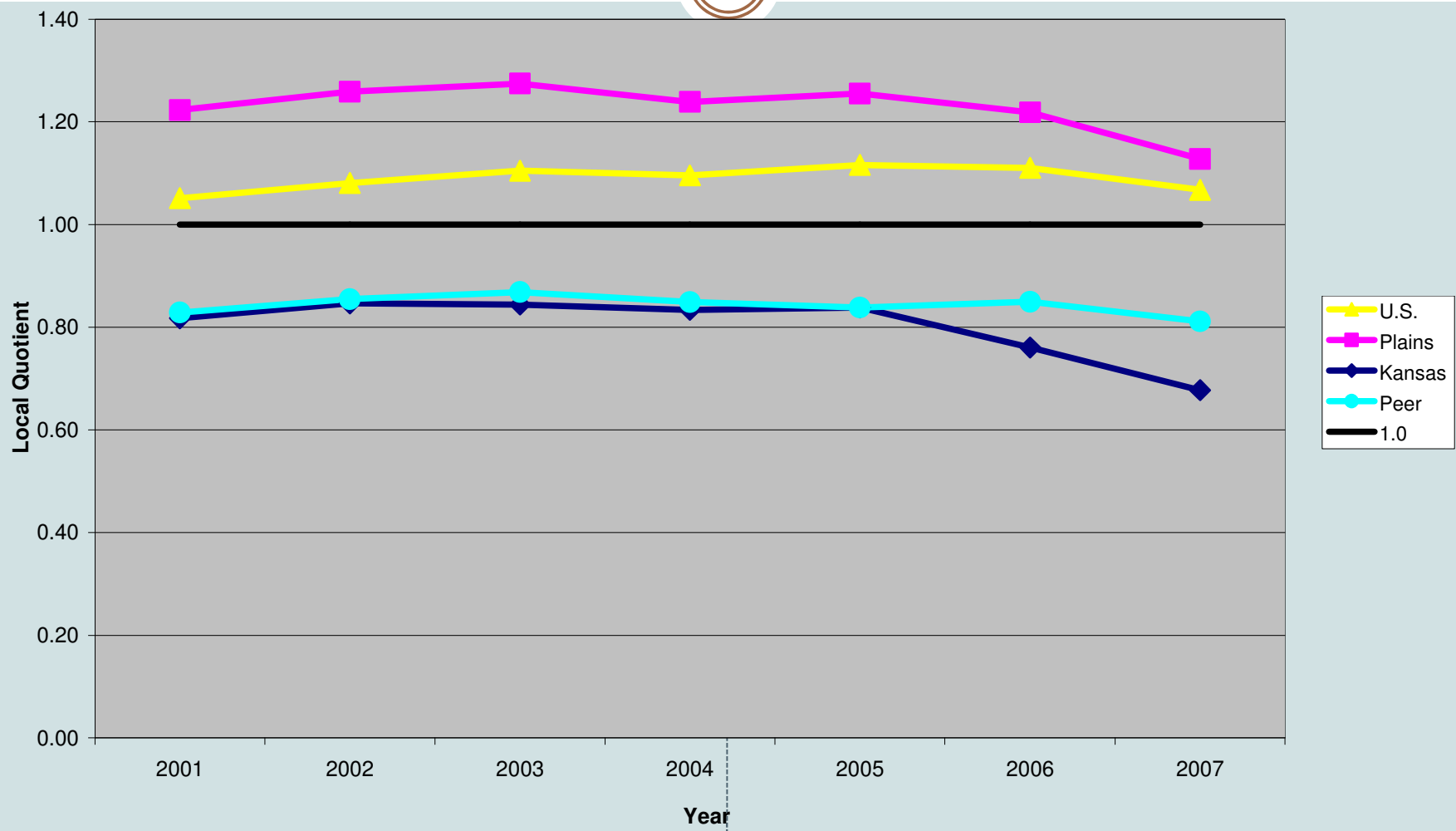
GOVERNMENT & GOVERNMENT ENTERPRISES LOCATION QUOTIENTS 2001-2007



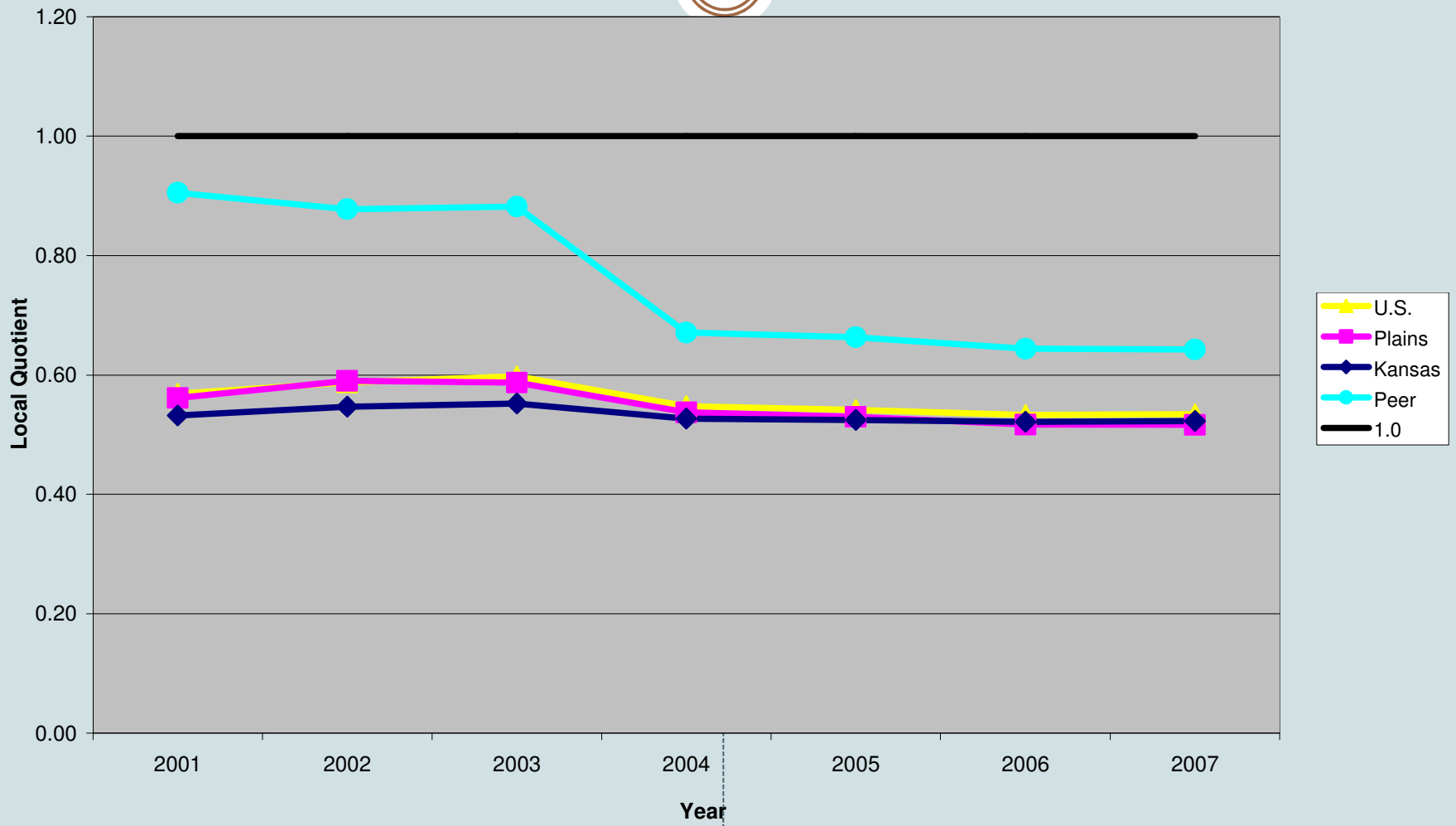
FEDERAL GOVERNMENT (CIVILIAN) LOCATION QUOTIENTS
2001-2007



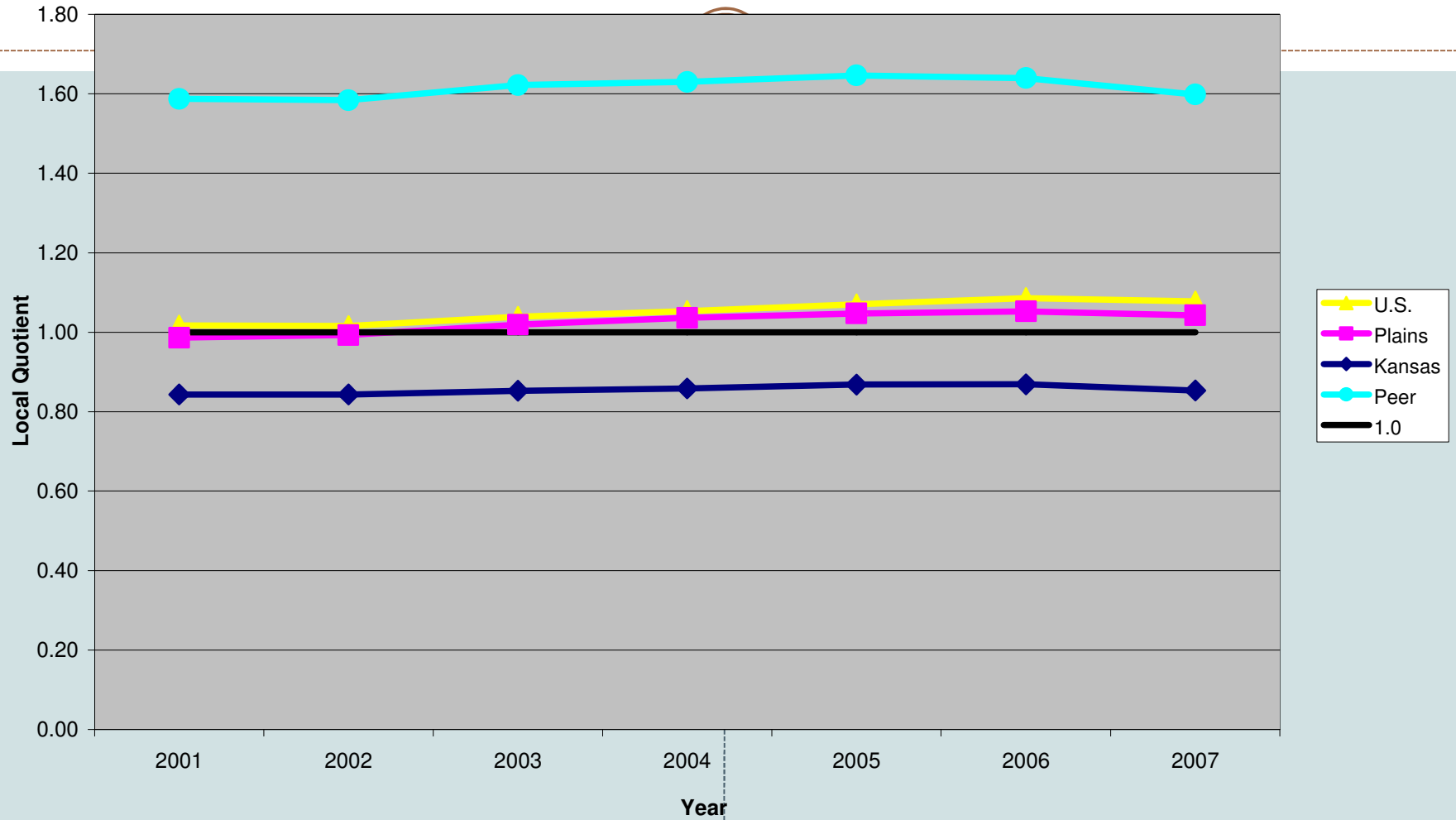
MILITARY LOCATION QUOTIENTS 2001-2007



STATE GOVERNMENT LOCATION QUOTIENTS 2001-2007



LOCAL GOVERNMENT LOCATION QUOTIENTS 2001-2007



Shift-and-Share Analysis



- **Purpose**
 - Distinguishes local influences on growth from industry-wide or national growth
 - Identifies strengths and weaknesses in the local economy
 - Isolates the contribution of an area's industrial mix to economic growth
- **Shift-and-share analysis focuses on changes in the local economy by industry over a period of time**
- **Shift-and-share analysis is a computational technique that describes how the local economy, classified by industry has changed compared with changes in a benchmark economy**
 - By relating changes in the local economy to those in the benchmark economy, differences in the local growth of an industry can be compared with the benchmark growth of the same industry
 - While shift-and-share analysis identifies these growth differences, it does not purport to explain why a local industry is performing better or worse than the benchmark industry
 - Part of the local economy's change over time results from the local economy's being heavily concentrated in industries that are growing or declining
 - Another part of the change in the local economy over time is the result of the local area's increasing or decreasing share of an industry

Key Questions Addressed by Shift-and-Share Analysis



- How is the local mix of industries growing compared to the benchmark mix of industries?
- Is the local economy capturing an increasing or decreasing share of each industry over time?

Shift-and-Share Components



- *Benchmark growth*—The growth rate of the overall benchmark economy
- *Industrial mix*—The difference between the growth rate for a particular industry in the benchmark economy and the growth rate of the overall benchmark economy
 - Industrial Mix Component = Benchmark Industrial Growth - Benchmark Overall Growth
- *Competitive share*—The difference between the growth rate for a particular industry in the local economy and its growth rate in the benchmark economy
 - Competitive Share Component = Local Industrial Growth - Benchmark Industrial Growth

SHIFT-AND-SHARE ANALYSIS: REAP COUNTIES VERSUS U.S.

Industry	National Growth	Industrial Mix	Competitive Share	Economic Performance
Total employment	38,703	-	(23,346)	Lagging
Wage and salary employment	31,699	(15,316)	(10,482)	Lagging
Proprietors employment	7,004	16,670	(14,218)	Lagging
Farm proprietors employment	830	(1,249)	231	Constrained
Nonfarm proprietors employment 2/	6,174	16,712	(13,242)	Lagging
Farm employment	937	(1,728)	467	Constrained
Nonfarm employment	37,765	1,298	(23,382)	Lagging
Private employment	32,984	3,725	(23,257)	Lagging
Forestry, fishing, related activities, and other 3/	44	(48)	(165)	Weak
Mining	533	833	(5,339)	Lagging
Utilities	57	(105)	107	Constrained
Construction	2,062	2,443	(1,565)	Lagging
Manufacturing	7,226	(19,883)	4,838	Constrained
Wholesale trade	1,301	(345)	(1,784)	Lagging
Retail Trade	4,240	(2,174)	(134)	Lagging
Transportation and warehousing	735	(69)	(674)	Lagging
Information	746	(1,886)	298	Constrained
Finance and insurance	1,477	(144)	(3,340)	Lagging
Real estate and rental and leasing	1,010	4,644	(2,098)	Lagging
Professional and technical services	1,321	612	(864)	Lagging
Management of companies and enterprises	423	107	(1,078)	Lagging
Administrative and waste services	1,922	1,813	1,217	Strong
Educational services	500	1,019	(1,548)	Lagging
Health care and social assistance	3,650	3,620	(3,023)	Lagging
Arts, entertainment, and recreation	566	467	89	Strong
Accommodation and food services	2,258	1,313	(990)	Lagging
Other services, except public administration	1,937	863	(986)	Lagging
Government and government enterprises	4,782	(2,118)	(435)	Lagging
Federal, civilian	468	(357)	84	Strong
Military	511	(681)	(190)	Weak
State and local	3,803	(1,117)	(293)	Lagging
State government	663	(388)	(857)	Lagging
Local government	3,140	(577)	412	Strong
Total Employment	38,703	-	(23,346)	Lagging

SHIFT-AND-SHARE ANALYSIS: REAP COUNTIES VERSUS PLAINS STATES

Industry	Plains Growth	Industrial Mix	Competitive Share	Economic Performance
Total employment	26,381	-	(11,024)	Lagging
Wage and salary employment	21,607	(8,672)	(7,034)	Lagging
Proprietors employment	4,774	8,360	(3,678)	Lagging
Farm proprietors employment	566	(942)	188	Constrained
Nonfarm proprietors employment 2/	4,208	10,882	(5,447)	Lagging
Farm employment	639	(1,175)	212	Constrained
Nonfarm employment	25,742	2,125	(12,185)	Lagging
Private employment	22,482	3,509	(12,539)	Lagging
Forestry, fishing, related activities, and other 3/	30	14	(212)	Weak
Mining	363	485	(4,821)	Lagging
Utilities	39	(61)	82	Lagging
Construction	1,405	1,523	12	Strong
Manufacturing	4,925	(11,151)	(1,593)	Weak
Wholesale trade	887	(448)	(1,267)	Lagging
Retail Trade	2,890	(2,533)	1,576	Strong
Transportation and warehousing	501	2	(512)	Lagging
Information	508	(1,646)	296	Constrained
Finance and insurance	1,007	366	(3,380)	Lagging
Real estate and rental and leasing	689	3,436	(569)	Lagging
Professional and technical services	900	721	(553)	Lagging
Management of companies and enterprises	288	(14)	(822)	Lagging
Administrative and waste services	1,310	1,886	1,755	Strong
Educational services	341	783	(1,153)	Lagging
Health care and social assistance	2,488	3,075	(1,315)	Lagging
Arts, entertainment, and recreation	386	499	237	Strong
Accommodation and food services	1,539	1,057	(15)	Lagging
Other services, except public administration	1,321	688	(194)	Lagging
Government and government enterprises	3,259	(1,165)	134	Strong
Federal, civilian	319	(332)	208	Constrained
Military	349	(76)	(632)	Lagging
State and local	2,592	(749)	550	Strong
State government	452	(210)	(824)	Lagging
Local government	2,140	(480)	1,314	Strong
Total Employment	26,381	-	(11,024)	Lagging

SHIFT-AND-SHARE ANALYSIS: REAP COUNTIES VERSUS KANSAS

Industry	Kansas Growth	Industrial Mix	Competitive Share	Economic Performance
Total employment	19,070	-	(3,713)	Lagging
Wage and salary employment	15,619	(5,626)	(4,092)	Weak
Proprietors employment	3,451	5,251	754	Weak
Farm proprietors employment	409	(599)	2	Constrained
Nonfarm proprietors employment 2/	3,042	6,780	(178)	Lagging
Farm employment	462	(837)	51	Constrained
Nonfarm employment	18,608	1,555	(4,481)	Lagging
Private employment	16,252	1,231	(4,030)	Lagging
Forestry, fishing, related activities, and other 3/	22	19	(210)	Weak
Mining	263	860	(5,095)	Weak
Utilities	28	(35)	67	Constrained
Construction	1,016	705	1,219	Strong
Manufacturing	3,560	(7,051)	(4,328)	Weak
Wholesale trade	641	(507)	(962)	Lagging
Retail Trade	2,089	(3,770)	3,614	Constrained
Transportation and warehousing	362	10	(380)	Lagging
Information	367	(1,991)	782	Constrained
Finance and insurance	728	515	(3,250)	Lagging
Real estate and rental and leasing	498	2,980	78	Weak
Professional and technical services	651	741	(324)	Weak
Management of companies and enterprises	208	(402)	(354)	Weak
Administrative and waste services	947	3,959	45	Strong
Educational services	246	287	(562)	Weak
Health care and social assistance	1,798	2,063	386	Weak
Arts, entertainment, and recreation	279	73	770	Weak
Accommodation and food services	1,113	797	672	Weak
Other services, except public administration	955	520	341	Weak
Government and government enterprises	2,356	289	(416)	Weak
Federal, civilian	230	(461)	425	Constrained
Military	252	641	(1,252)	Lagging
State and local	1,874	105	414	Weak
State government	327	(725)	(183)	Weak
Local government	1,547	1,265	163	Strong
Total Employment	19,070	-	(3,713)	Lagging

SHIFT-AND-SHARE ANALYSIS: REAP COUNTIES VERSUS PEERS

Industry	Peer Growth	Industrial Mix	Competitive Share	Economic Performance
Total employment	32,527	-	(17,170)	Lagging
Wage and salary employment	26,641	(11,136)	(9,604)	Lagging
Proprietors employment	5,886	13,116	(9,546)	Lagging
Farm proprietors employment	697	(1,059)	174	Constrained
Nonfarm proprietors employment 2/	5,189	13,212	(8,757)	Lagging
Farm employment	788	(1,353)	241	Constrained
Nonfarm employment	31,740	787	(16,845)	Lagging
Private employment	27,721	1,187	(15,456)	Lagging
Forestry, fishing, related activities, and other 3/	37	75	(281)	Lagging
Mining	448	(695)	(3,726)	Weak
Utilities	48	(66)	77	Constrained
Construction	1,733	1,476	(269)	Lagging
Manufacturing	6,073	(17,325)	3,433	Constrained
Wholesale trade	1,093	(3,886)	1,965	Constrained
Retail Trade	3,564	(2,828)	1,198	Strong
Transportation and warehousing	618	2,224	(2,850)	Lagging
Information	627	(2,540)	1,071	Constrained
Finance and insurance	1,241	391	(3,640)	Lagging
Real estate and rental and leasing	849	3,193	(486)	Lagging
Professional and technical services	1,110	1,977	(2,019)	Lagging
Management of companies and enterprises	355	1,462	(2,365)	Lagging
Administrative and waste services	1,615	1,580	1,756	Strong
Educational services	420	859	(1,309)	Lagging
Health care and social assistance	3,067	3,290	(2,111)	Lagging
Arts, entertainment, and recreation	476	538	108	Strong
Accommodation and food services	1,898	1,613	(930)	Lagging
Other services, except public administration	1,628	547	(360)	Lagging
Government and government enterprises	4,019	(376)	(1,413)	Lagging
Federal, civilian	393	(384)	186	Strong
Military	430	(456)	(333)	Weak
State and local	3,196	830	(1,633)	Lagging
State government	557	2,244	(3,383)	Lagging
Local government	2,639	1,492	(1,156)	Lagging
Total Employment	32,527	-	(17,170)	Lagging