



INDUSTRY RESEARCH EXCHANGE

Welcome

8:30 | Log-in to GoToWebinar and Test System

9:00 | Welcoming Remarks

ARE KANSANS HEALTHY, WEALTHY, AND WISE?

9:05 |



Jeremy Hill

Director, Center for Economic Development and Business Research
W. Frank Barton School of Business, Wichita State University

[Read Bio](#)

KANSAS INCOME GAPS

9:30 |



Mike Busch

Senior Research Economist, Center for Economic Development and Business Research

W. Frank Barton School of Business, Wichita State University

[Read Bio](#)

While incomes have grown in Kansas in recent years, not all workers in Kansas have benefited equally. This presentation examines the gaps in income geographically throughout the state, as well as income gaps in Kansas by gender, ethnicity, and age, and how those compare to the nation.

COVID-19 IMPACT DISCUSSION

10:00 |

Jeremy Hill

10:30 |

Adjourn

Thank you

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**KANSAS HEALTH
FOUNDATION**

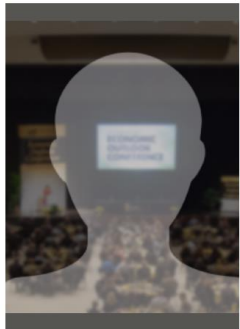
KANSAS ECONOMIC >> OUTLOOK CONFERENCE

Wichita, KS

**41st ANNUAL KANSAS ECONOMIC
OUTLOOK CONFERENCE**
Thursday, October 8, 2020 from 7:30-11:30 AM
Century II Convention Center
225 W Douglas Ave, Wichita, KS 67202

<http://eoc2020.cedbr.org/>

SPEAKERS AND PRESENTATIONS



Welcoming Remarks



Opening Remarks



National Economy



State and Local
Employment Forecast



Healthcare



TBD



TBD



Closing Remarks

This morning

- **Technical issues**

- Use the chat box or call Jeremy at 316-213-3673.

- **Questions**

- Participants are encouraged to ask questions during the meeting.
 - **Raise hand**
 - **Chat box**

- **Program changes**

- **Presentation materials**

- **Event recording**



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Thank you

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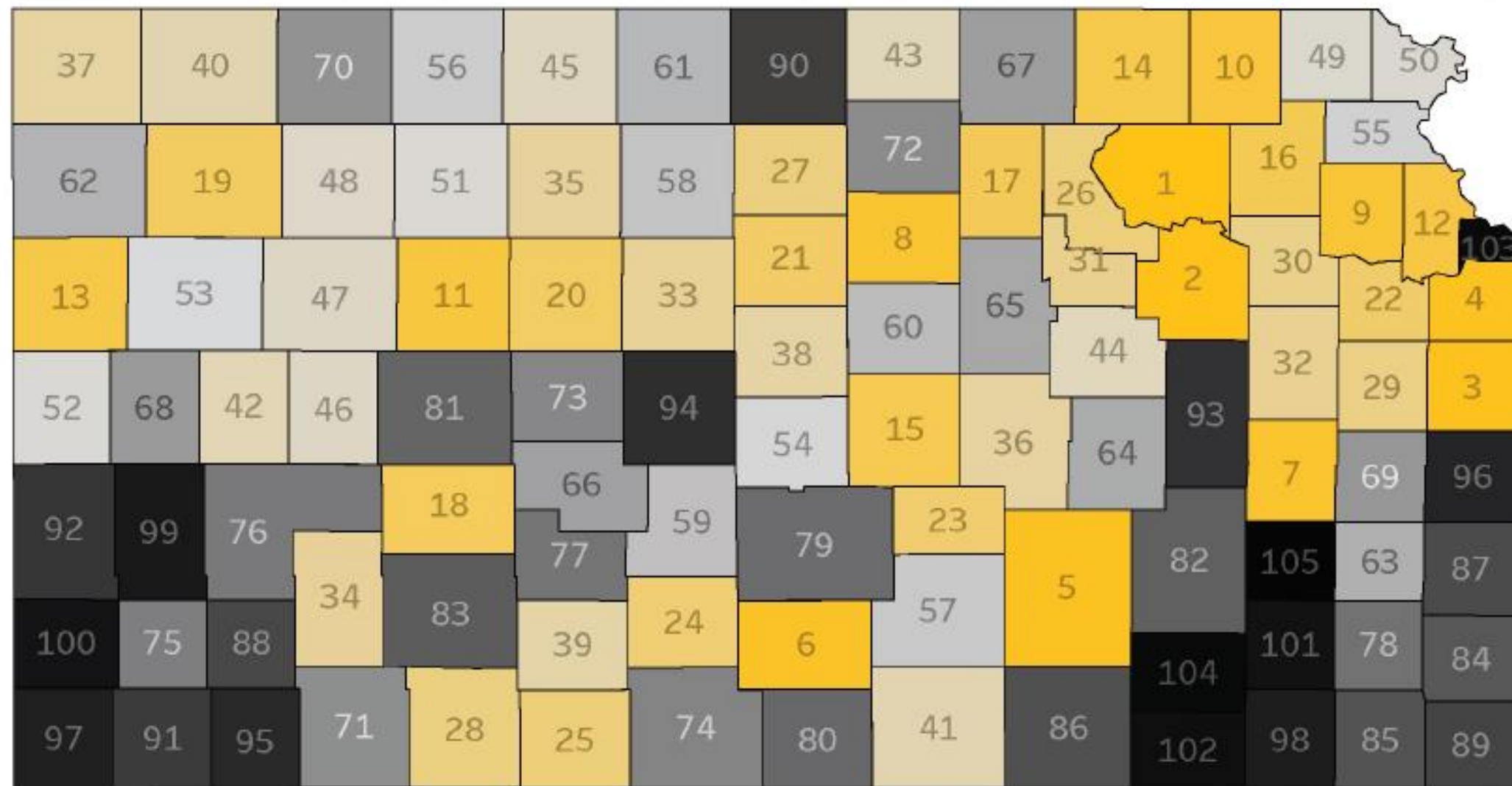
10:30 |

Adjourn

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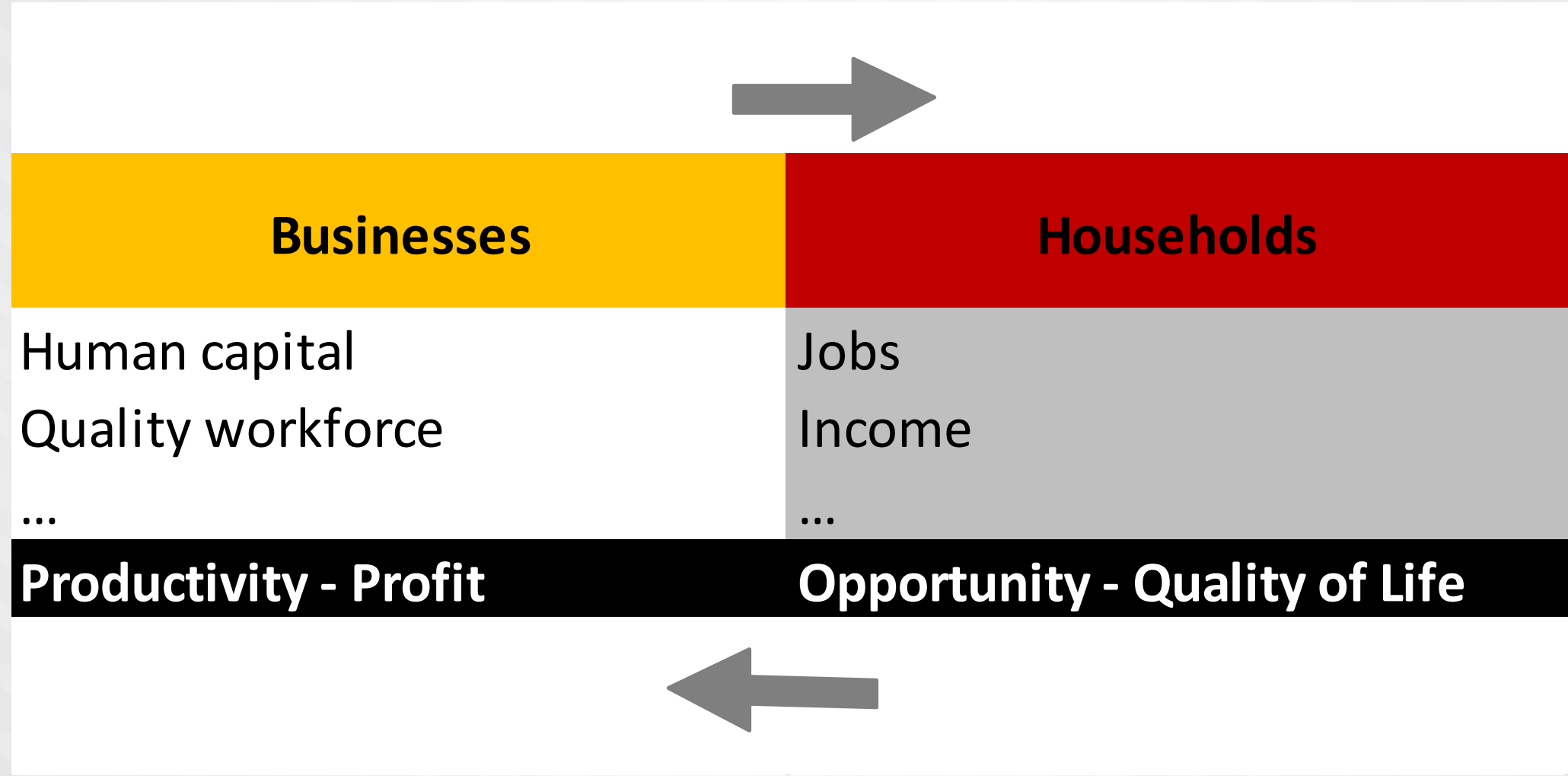
Health, Wealthy, Wise

Healthy, Wealthy, Wise 2020 Ranking

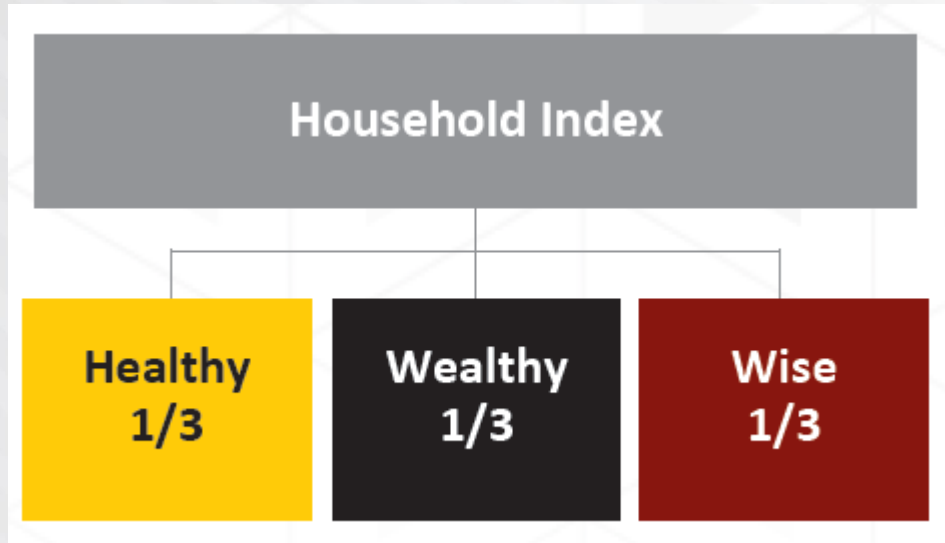


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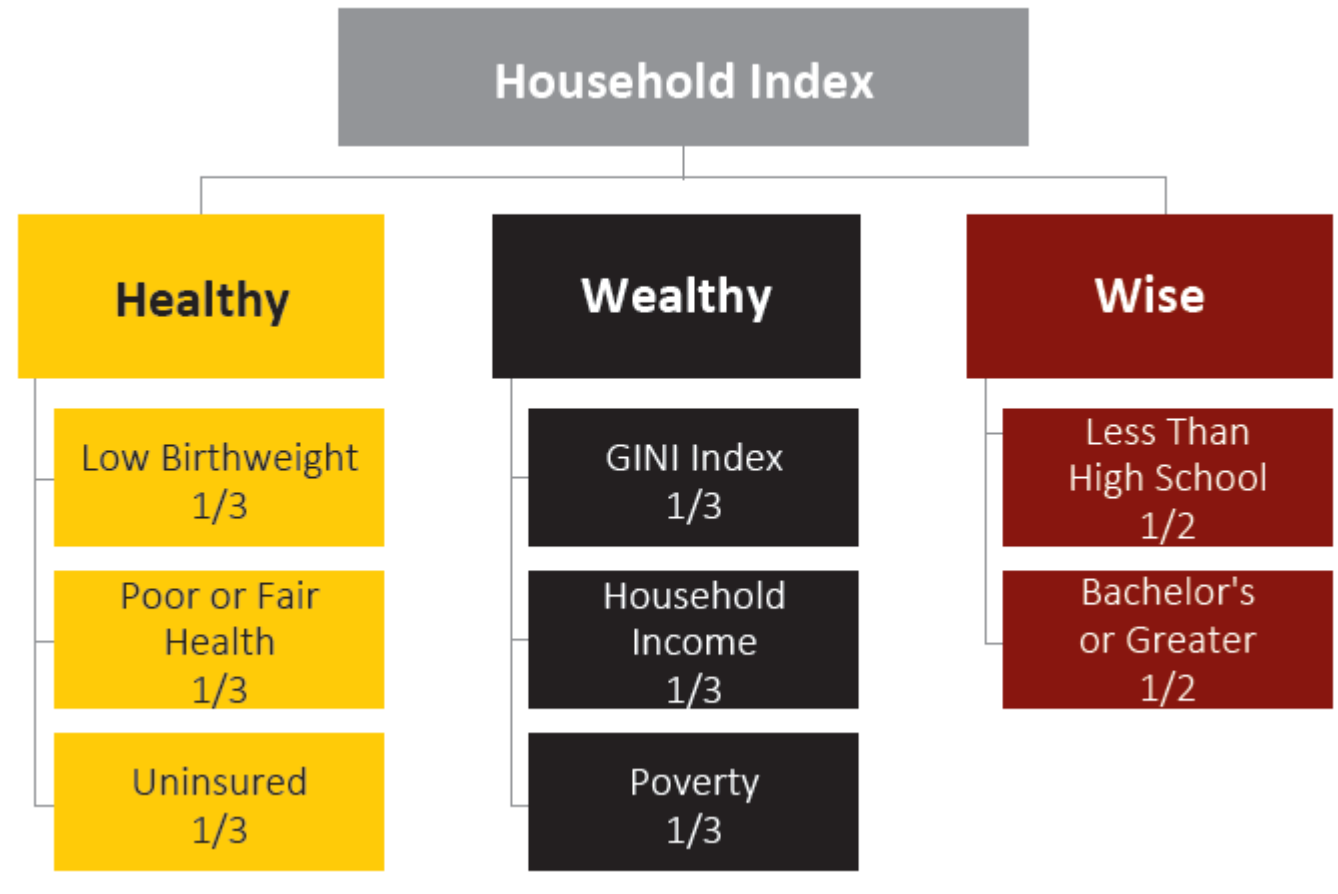
Why should we care about the overall wellness of households across markets in Kansas?



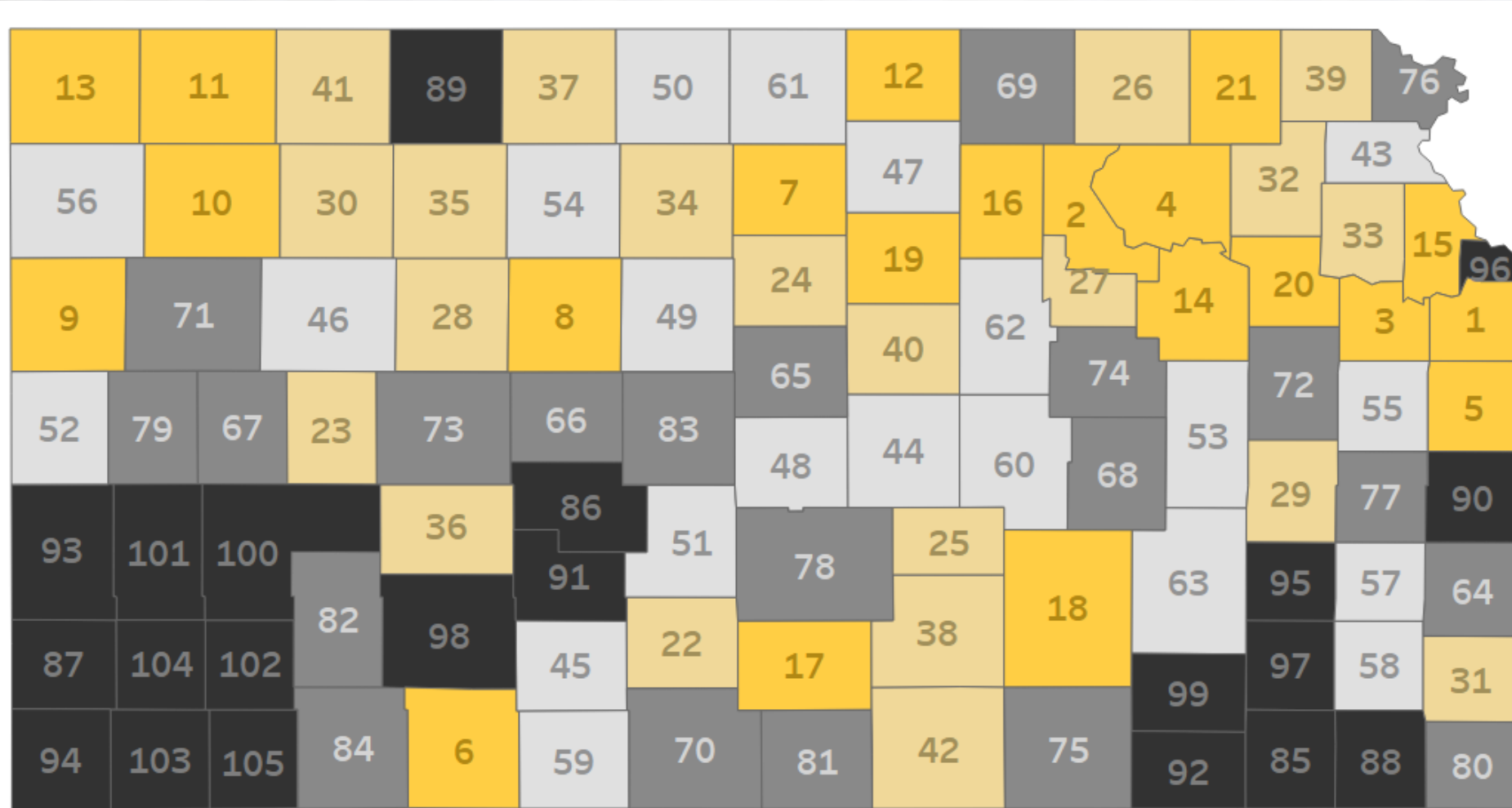
What should be included in household wellness?



Why are there only eight variables?

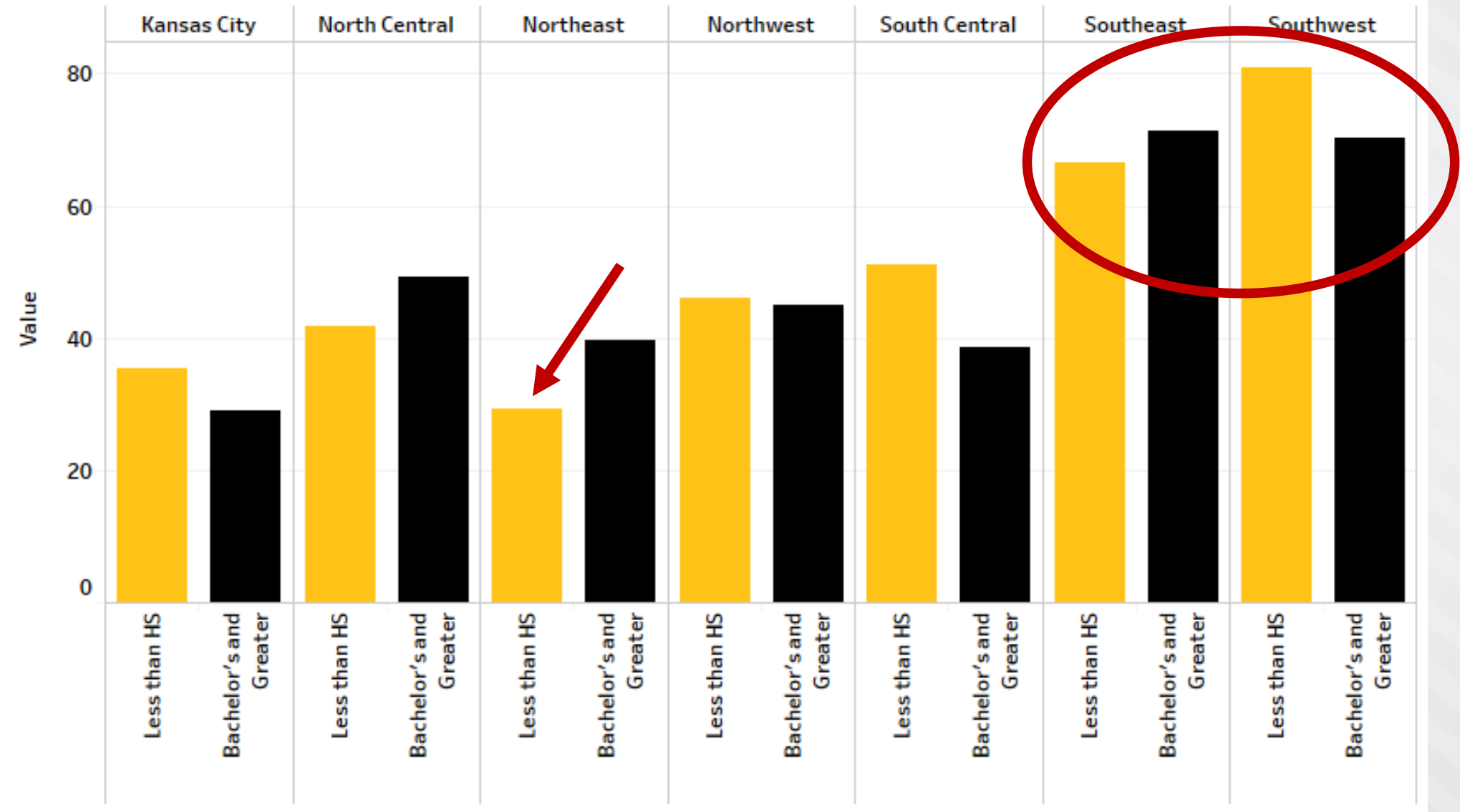


Wise

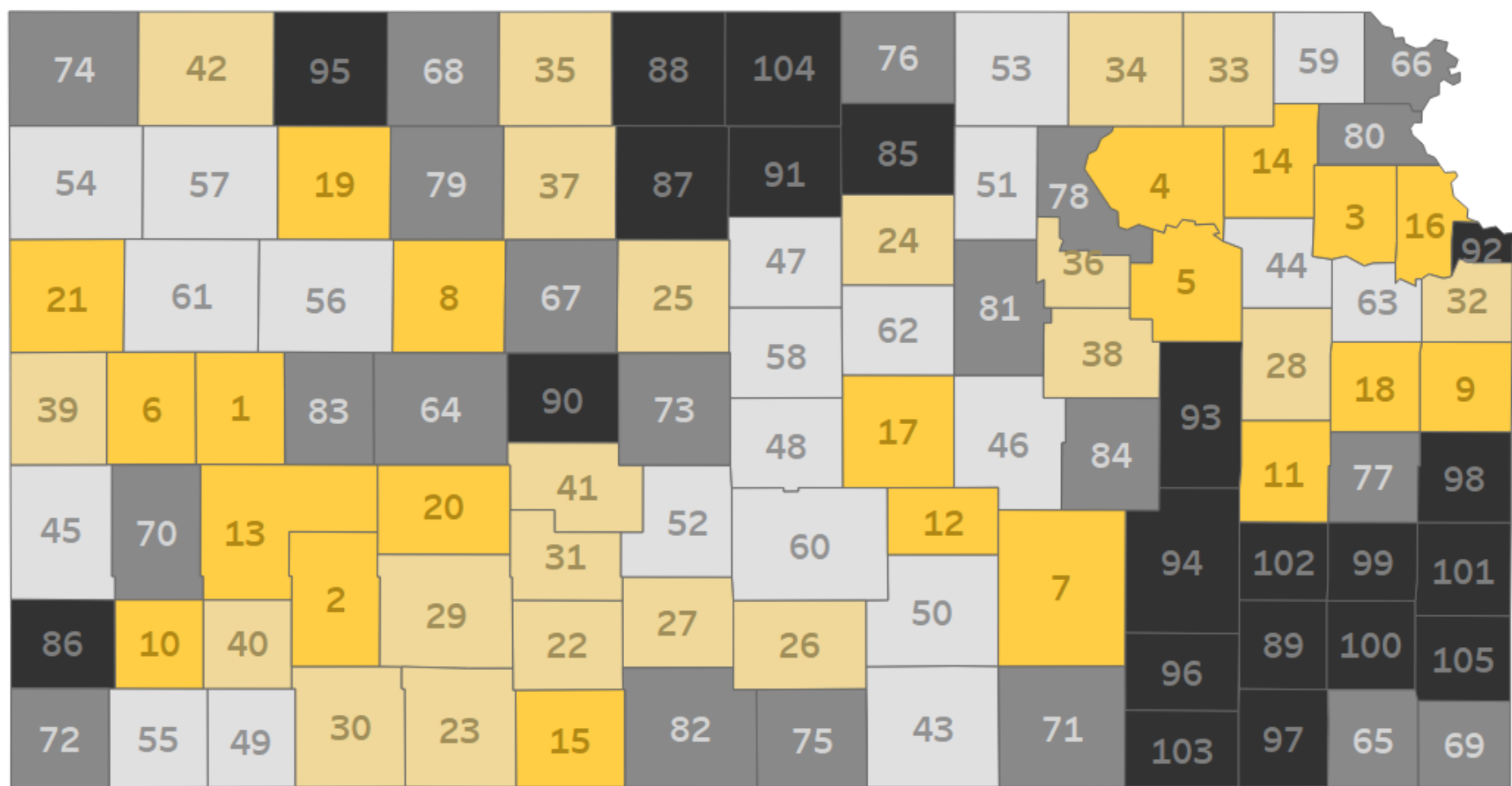


- Less than High school degree
- Bachelor's degree or greater

Average Ranking

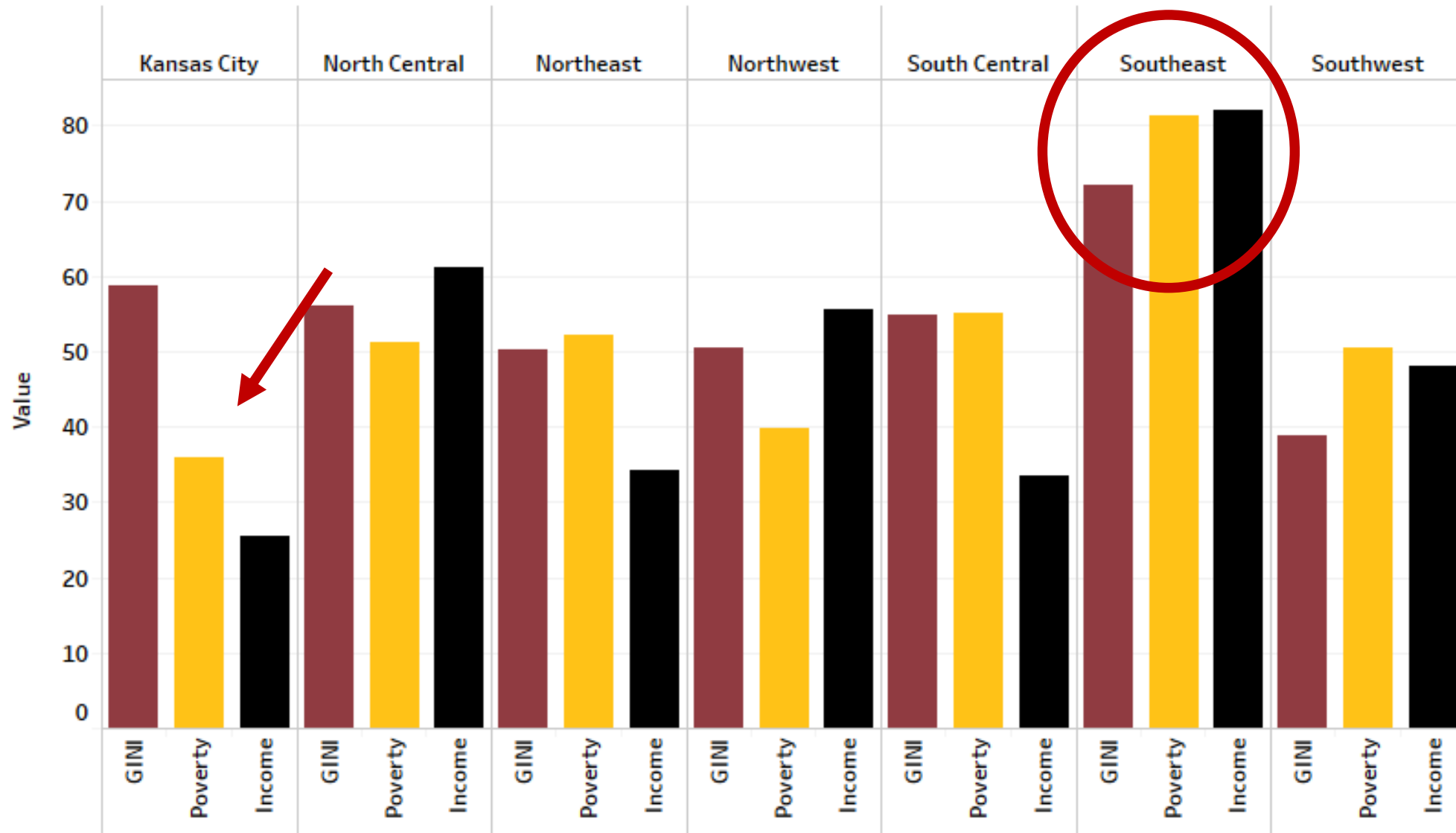


Wealth

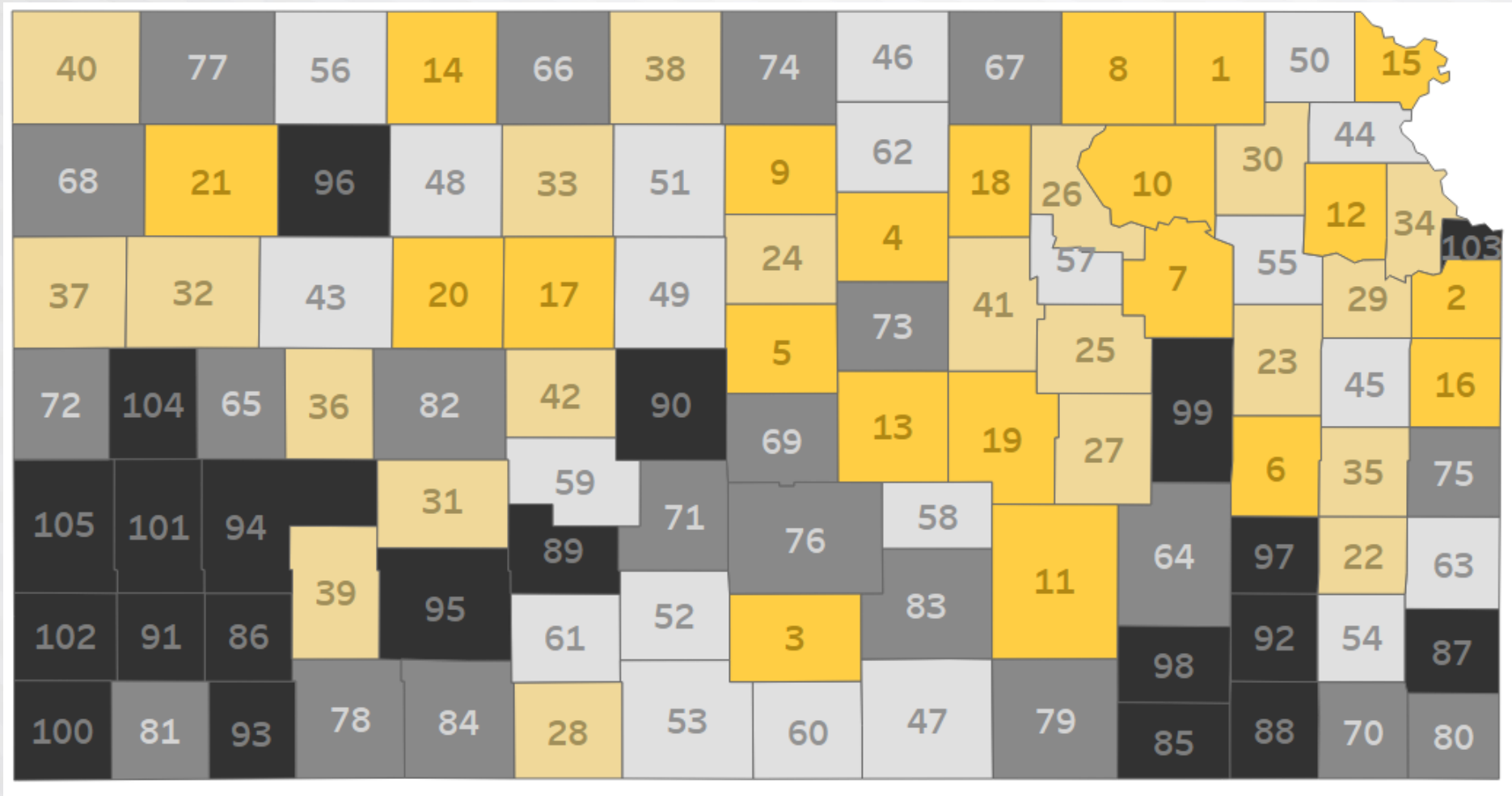


- GINI
- Poverty
- Income

Average Ranking

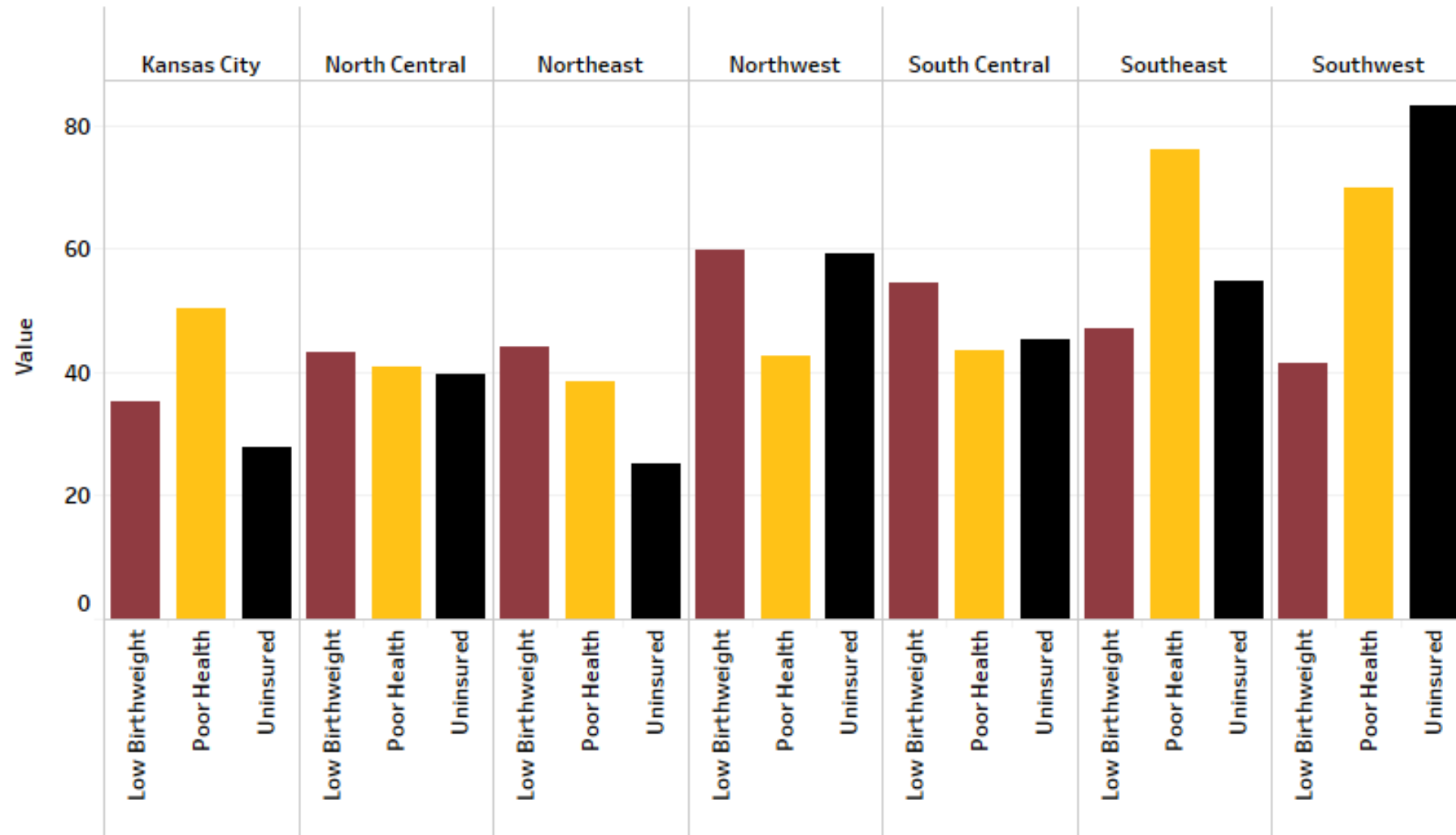


Health



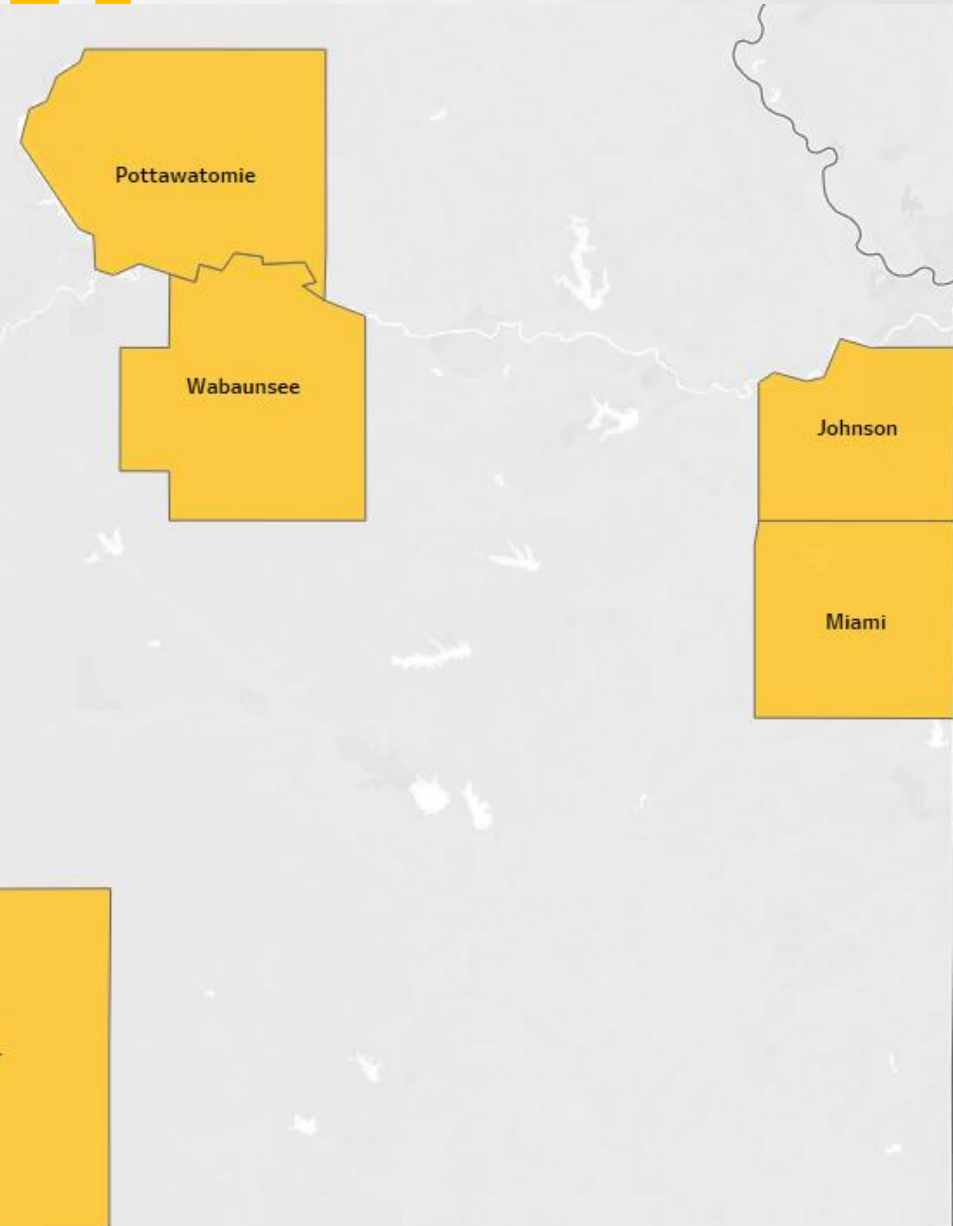
- Low Birthweight
- Poor health
- Uninsured

Average Ranking

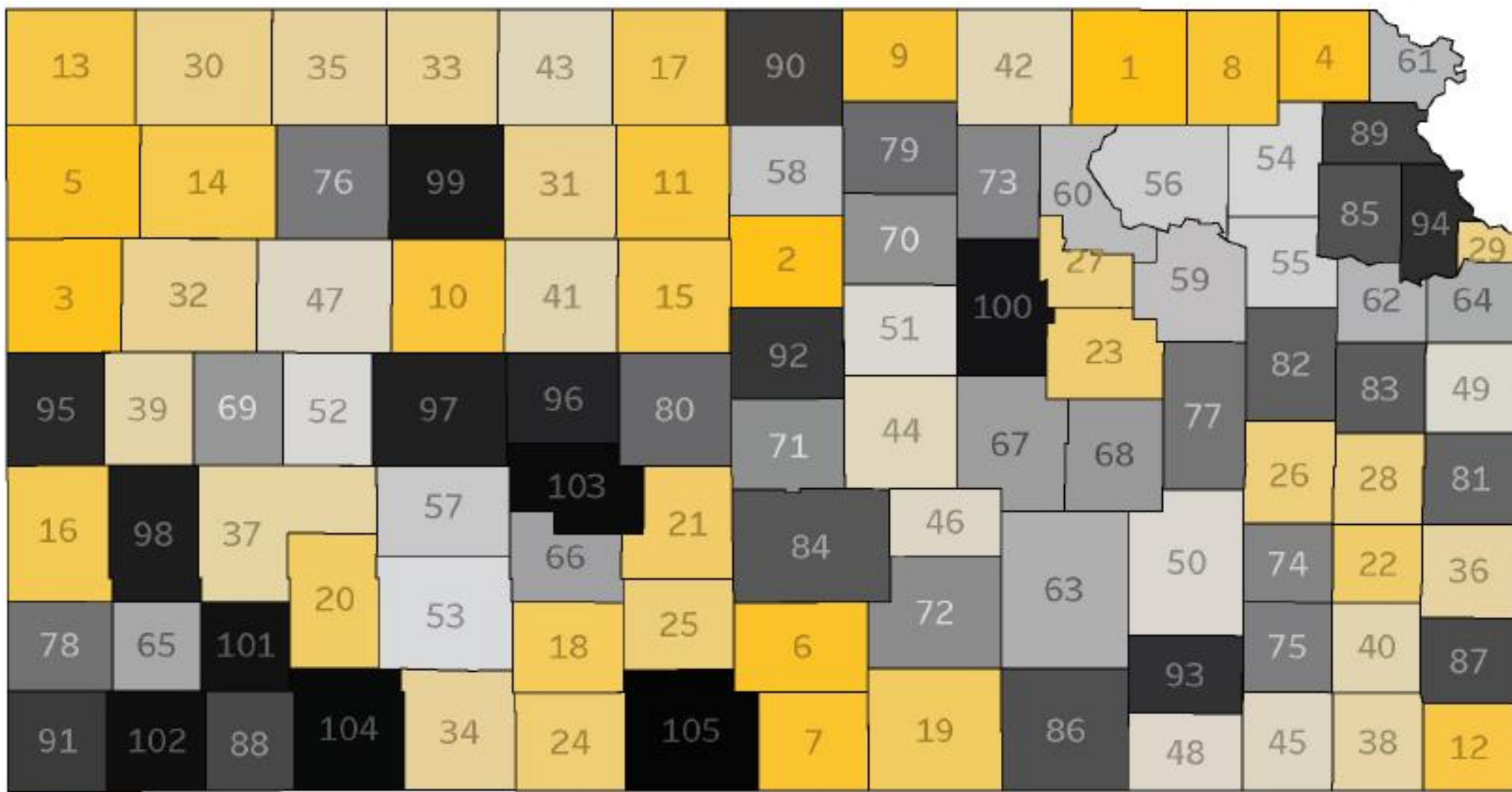


Profile of the top five

	Butler	Johnson	Miami	Pottawatomie	Wabaunsee
GINI	29	87	37	12	8
Income	6	1	3	9	24
Poverty	39	4	15	32	5
Low Birthweight	44	33	24	22	28
Poor Health	16	1	55	31	3
Uninsured	6	2	4	11	13
Less than HS	36	1	3	11	7
Bachelor's and Greater	14	1	19	5	38



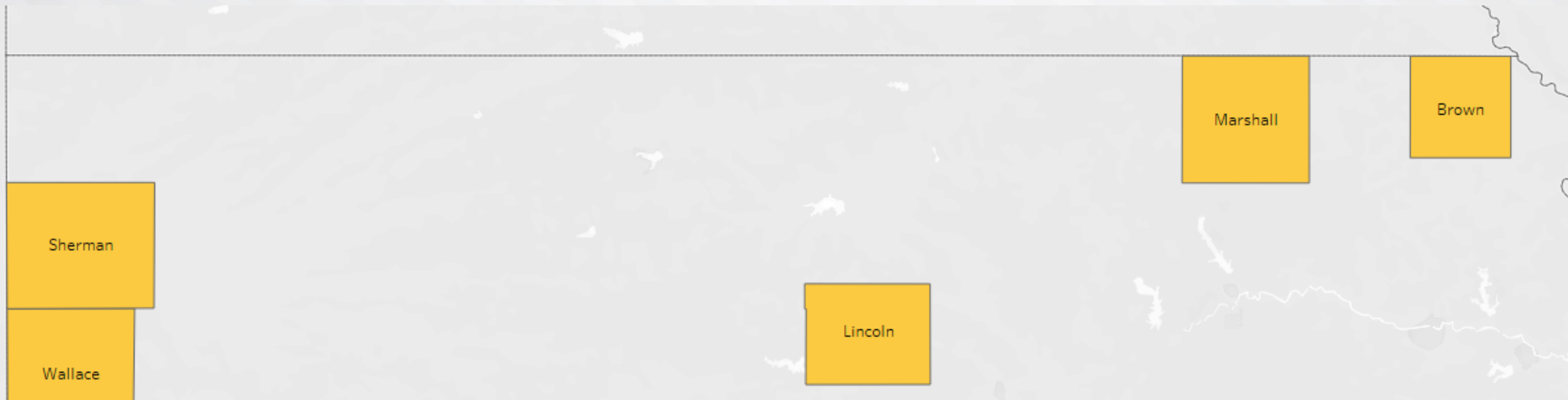
Healthy, Wealthy, Wise Improvements Ranking



1  105



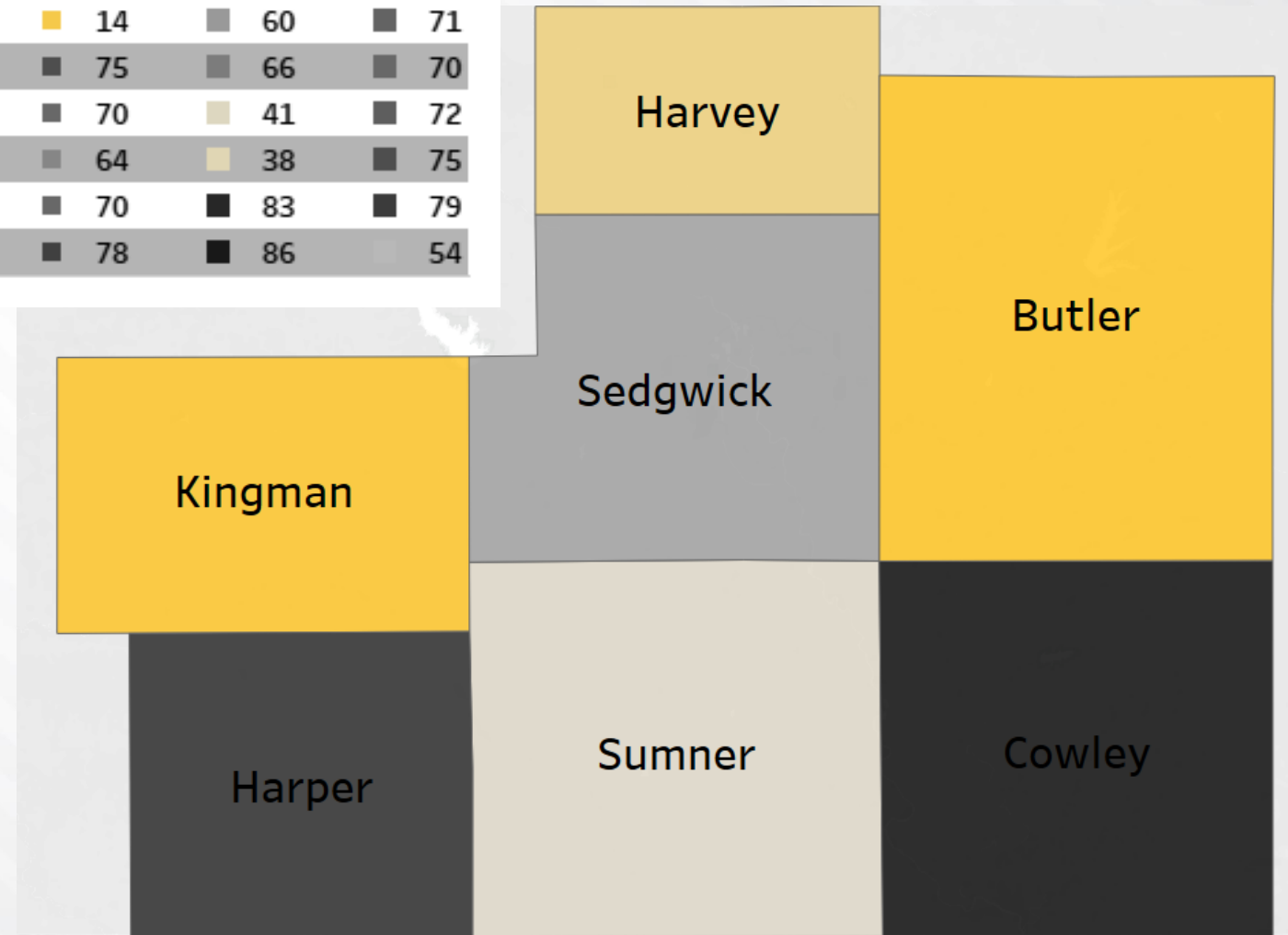
Profile of the most improved



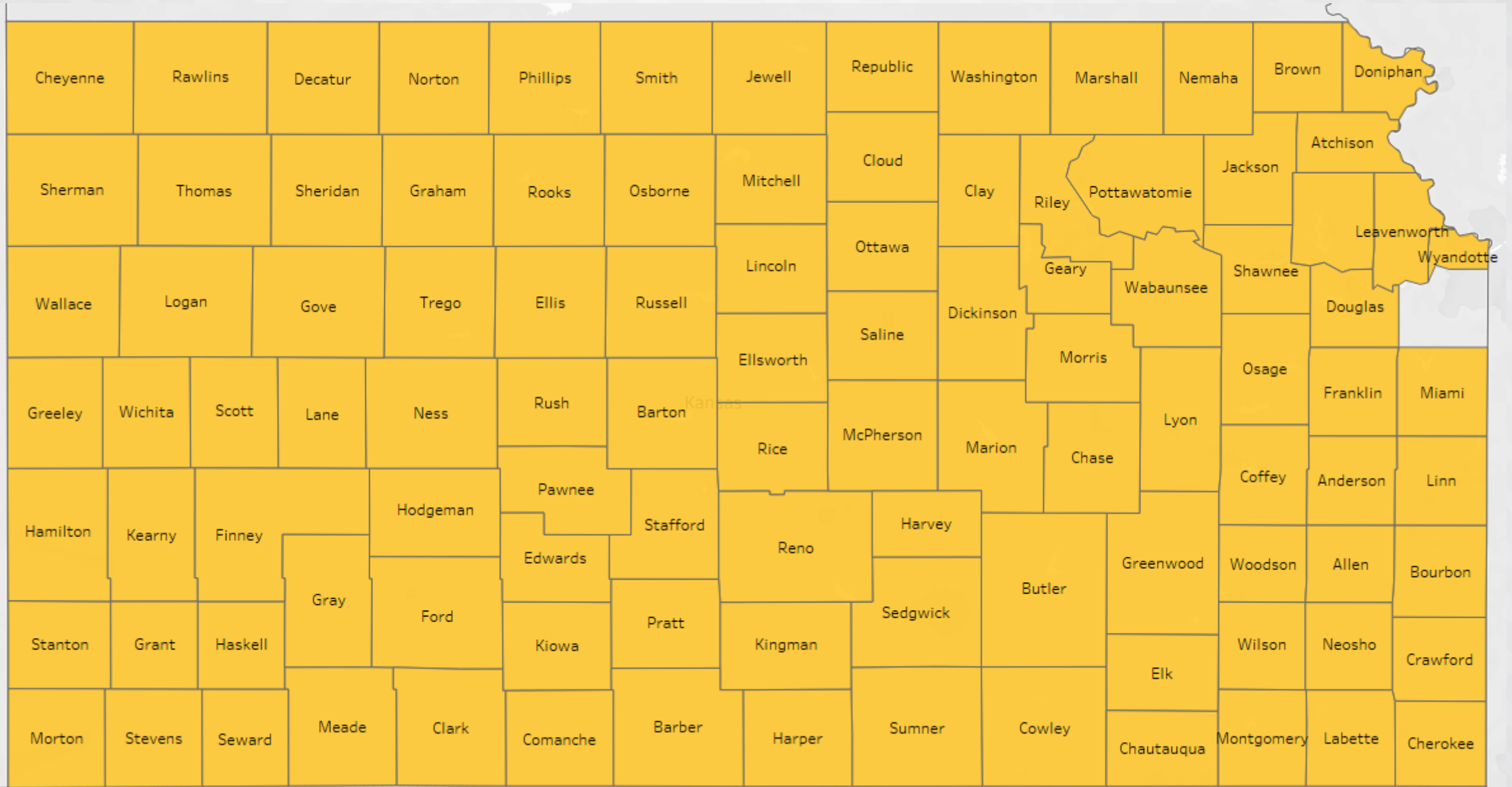
	Brown	Lincoln	Marshall	Sherman	Wallace
GINI	56	38	34	3	43
Income	56	64	53	99	20
Poverty	72	24	27	100	48
Low Birthweight	26		12	69	
Poor Health	71	27	28	67	33
Uninsured	51	43	18	46	47
Less than HS	32	18	49	31	23
Bachelor's and Greater	53	45	15	73	10

South Central

	Butler	Kingman	Harvey	Sumner	Sedgwick	Harper	Cowley
Bachelor's and Greater	14	33	8	48	9	91	67
GINI	29	76	17	48	89	70	55
Income	6	4	33	46	14	60	71
Less than HS	36	16	56	38	75	66	70
Low Birthweight	44	16	83	27	70	41	72
Poor Health	16	5	39	68	64	38	75
Poverty	39	14	45	56	70	83	79
Uninsured	6	17	41	35	78	86	54



	Douglas	Ellis	Saline	Finney	Ford	Lyon	Crawford
Bachelor's and Greater	■ 2	■ 4	■ 24	■ 93	■ 87	■ 20	■ 12
GINI	■ 100	■ 104	■ 74	■ 22	■ 51	■ 101	■ 94
Income	■ 10	■ 17	■ 42	■ 25	■ 26	■ 55	■ 100
Less than HS	■ 6	■ 29	■ 61	■ 103	■ 102	■ 81	■ 57
Low Birthweight	■ 46	■ 47	■ 63	■ 40	■ 34	■ 65	■ 67
Poor Health	■ 22	■ 23	■ 63	■ 100	■ 104	■ 98	■ 86
Poverty	■ 99	■ 82	■ 55	■ 78	■ 73	■ 92	■ 103
Uninsured	■ 39	■ 15	■ 62	■ 95	■ 99	■ 81	■ 68



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Coronavirus - Impact

Jeremy Hill

2020

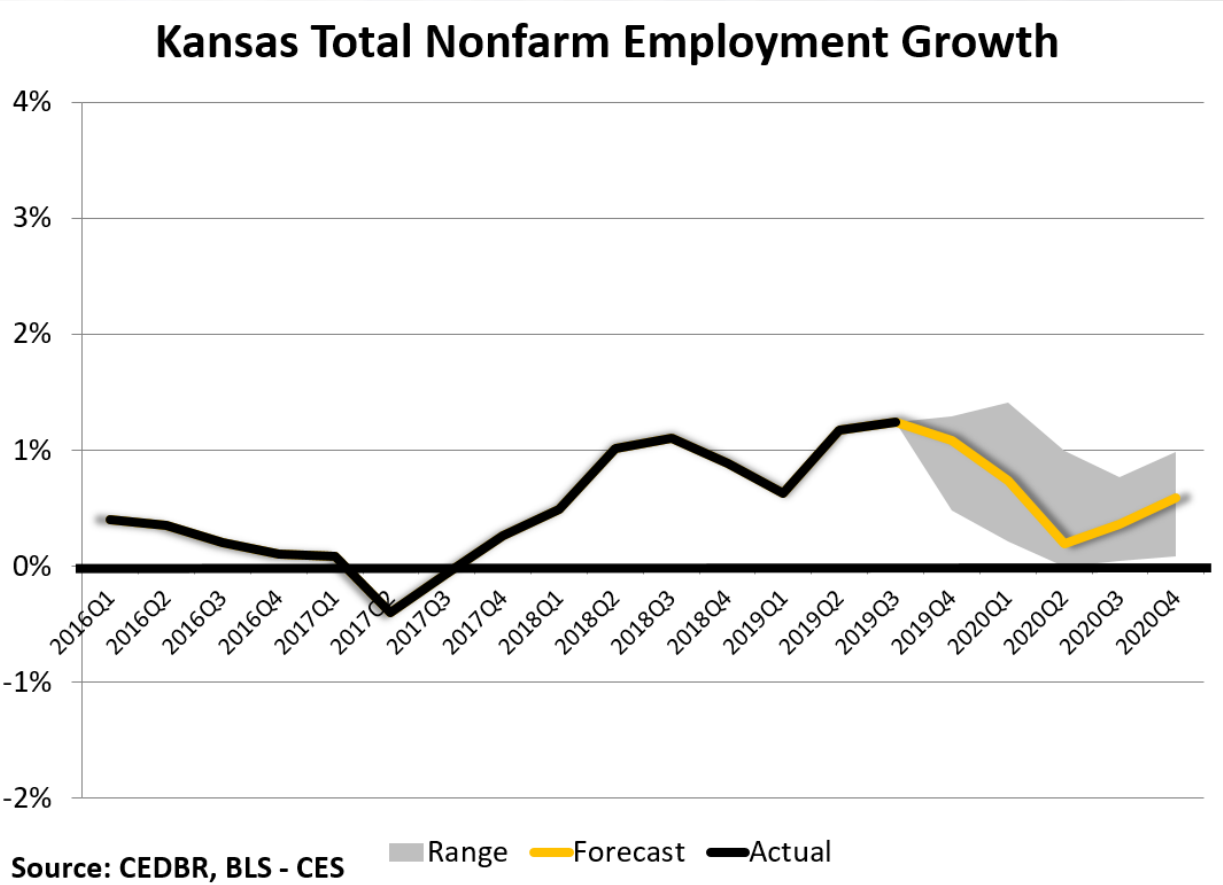
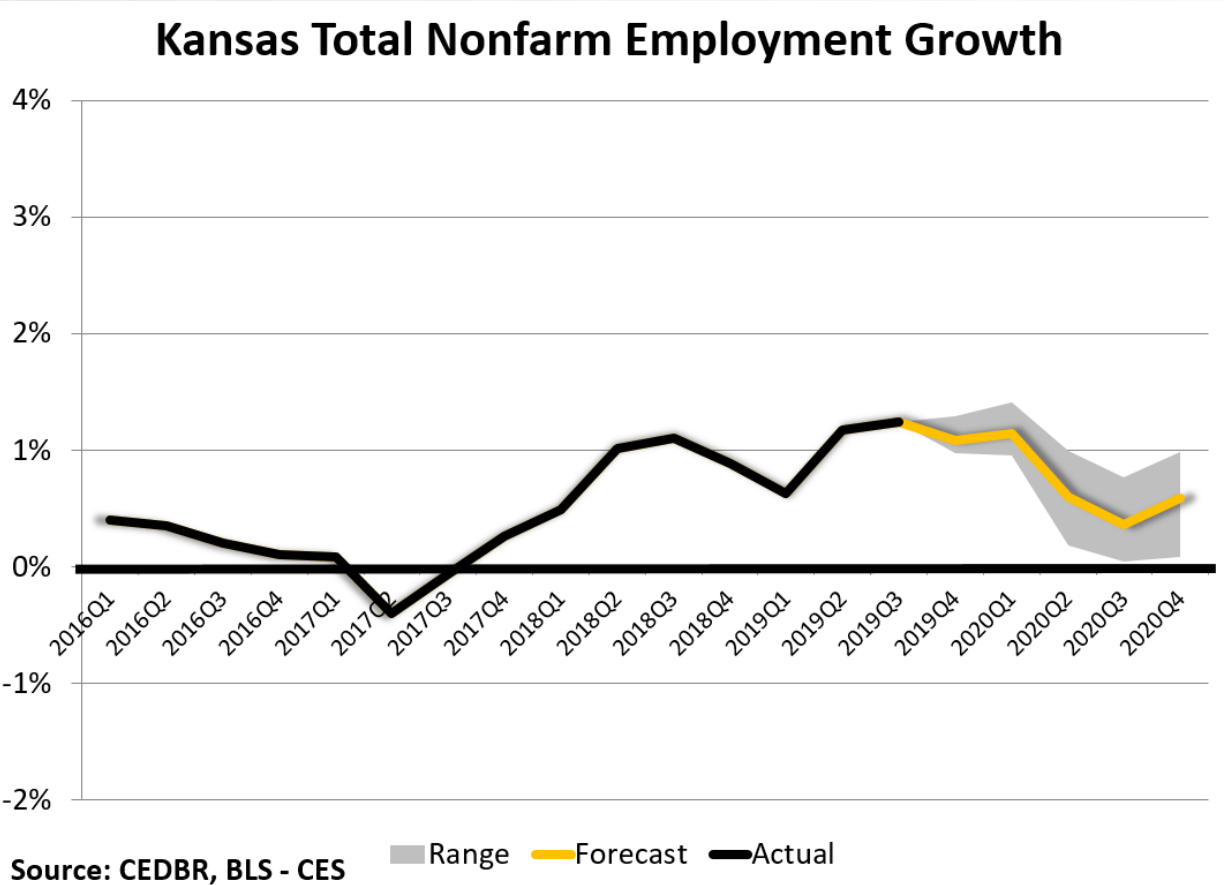
Black Swan Events



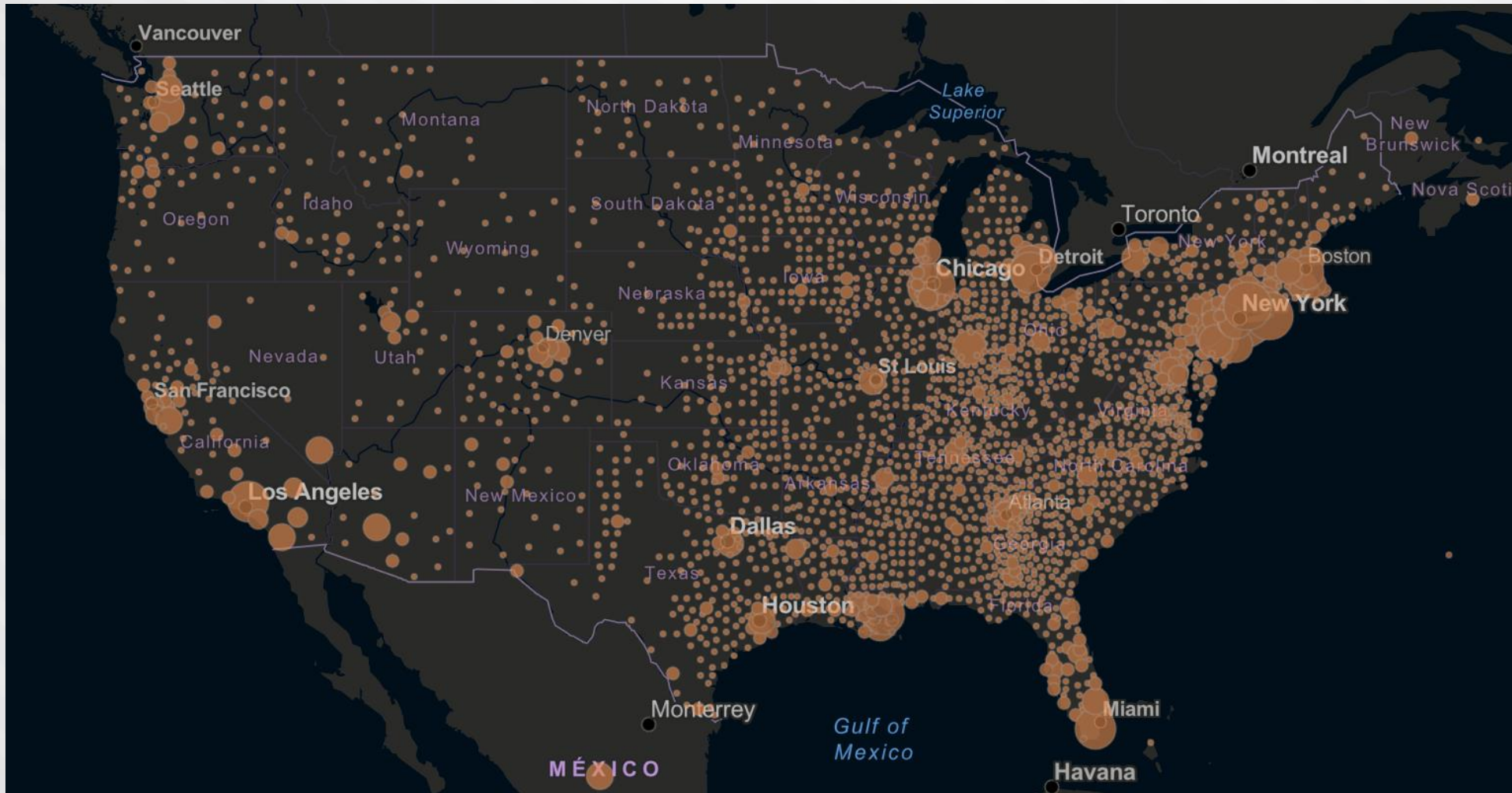
KS will grow at a slower pace than expected

Original Forecast

Adjusted Forecast



Active Cases



Source: John Hopkins <https://coronavirus.jhu.edu/map.html>

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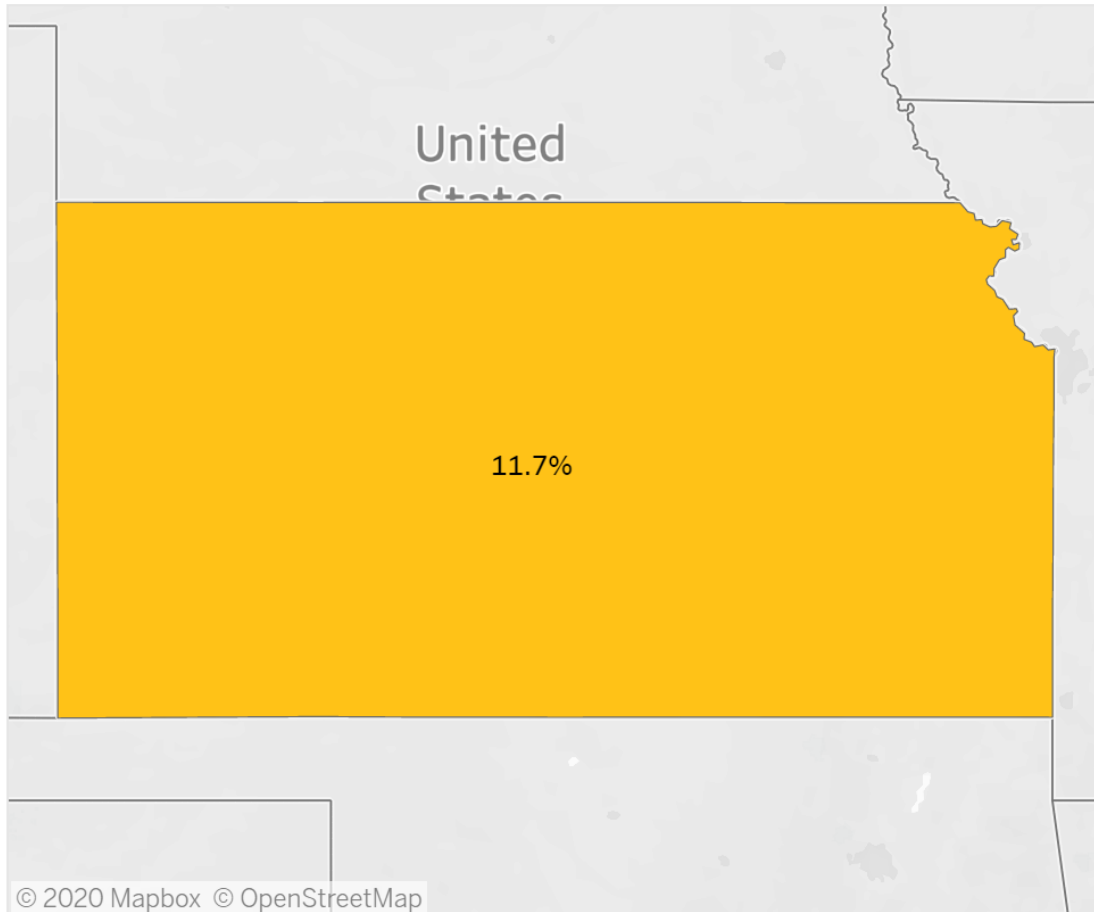


Vulnerability



Vulnerability – Service Sector

Total Share of Service Sector Employment Vulnerability



State Selection

Kansas

Concentration of Vulnerable Workers

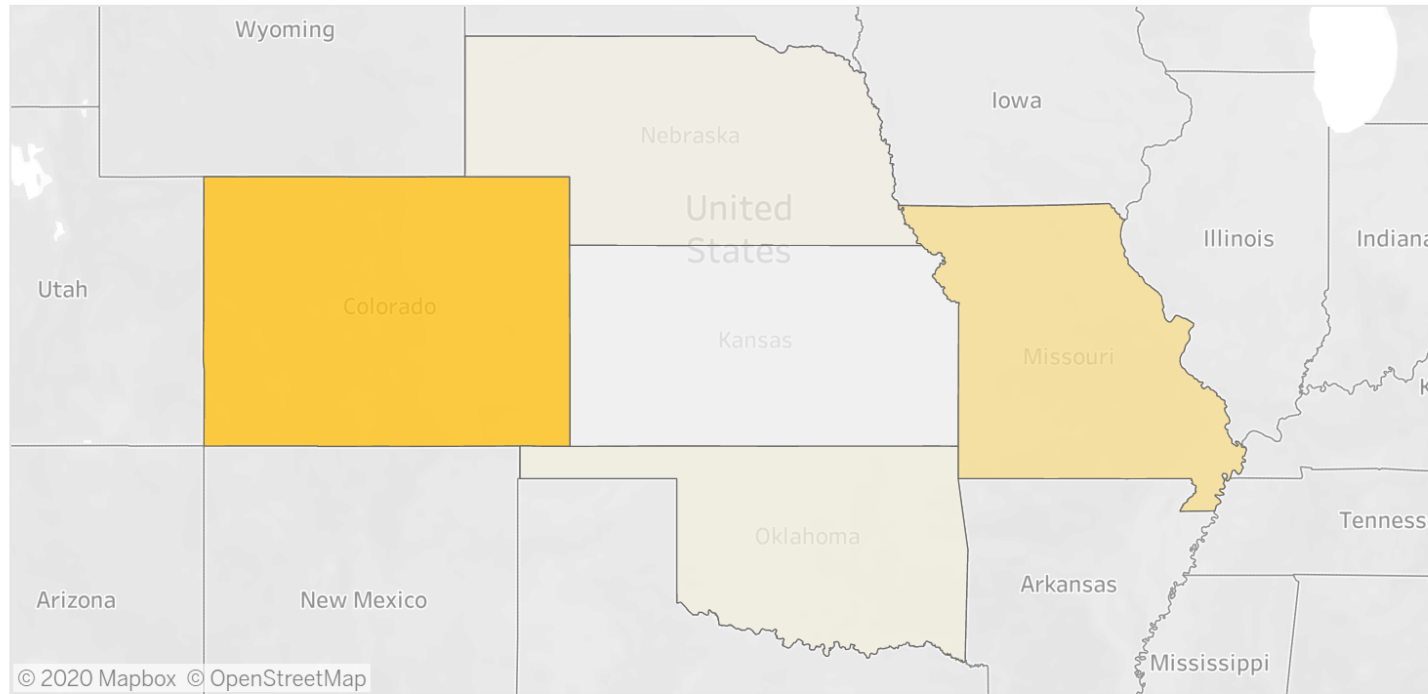
Type	Employment Concentration	Wage Concentration
Accommodation	0.6	0.4
Air transportation	0.1	0.1
Amusement, gambling, and ..	0.9	0.9
Food services and drinking p..	0.9	0.9
Museums, historical sites, z..	0.6	0.4
Performing arts	0.5	0.2
Personal care services	0.9	1.0
Sightseeing transportation	0.0	0.0
Temporary help services	0.9	0.9
Travel arrangement services	0.5	0.5

Concentration is measured by the industry sector share locally compared to the nation. A value of 1 means the industry concentration is similar to the nation and values greater than 1 indicate a higher concentration.

Example: If a state has a value of 2.0, that means the sector is two times more concentrated within that economy compared to the nation.



Total Share of Vulnerable Service Employment



State Selection

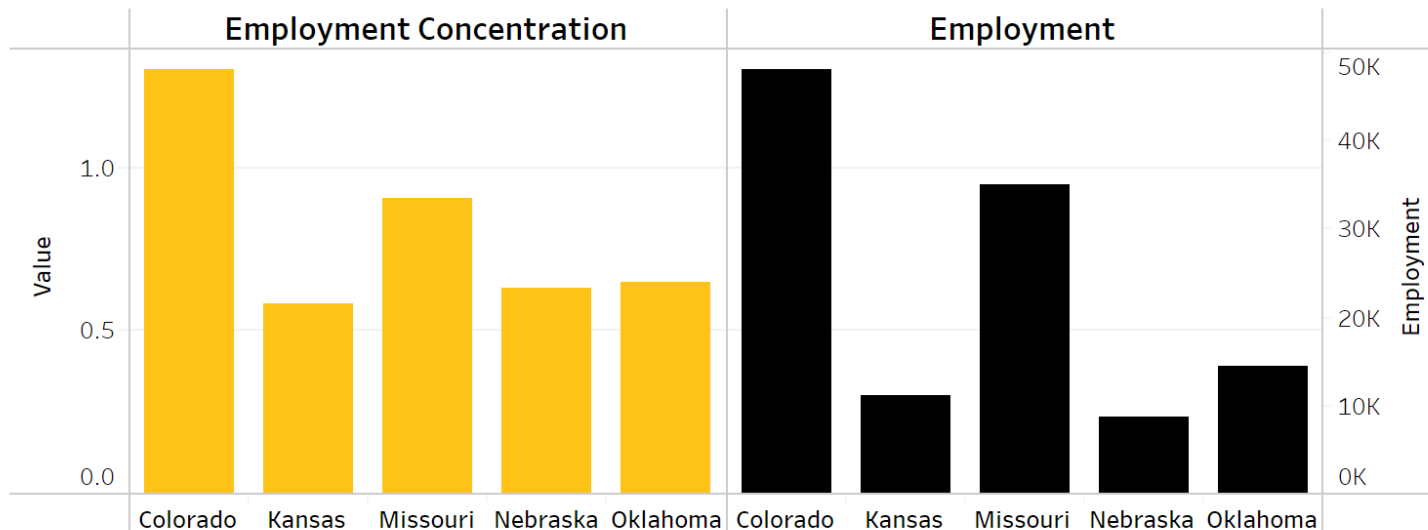
(Multiple values) ▼

Employment Share

0.8% 1.8%

Industry Selection

- ☒ Accommodation
- ☐ Air transportation
- ☐ Amusement, gambling, and recreati...
- ☐ Food services and drinking places
- ☐ Museums, historical sites, zoos
- ☐ Performing arts
- ☐ Personal care services
- ☐ Sightseeing transportation
- ☐ Temporary help services
- ☐ Total Employment
- ☐ Travel arrangement services



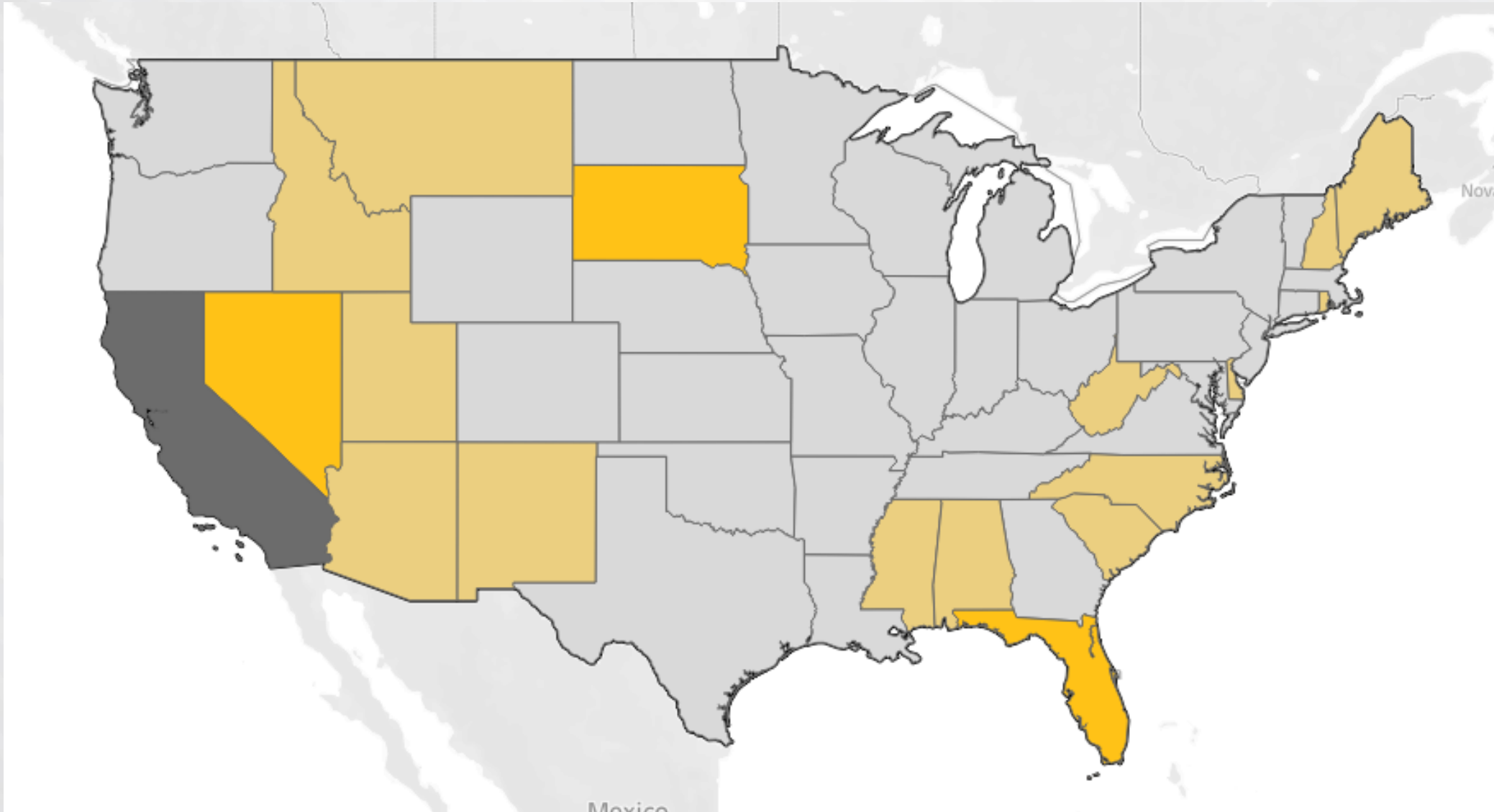
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Top Kansas Occupations (Interacting with Others)

		Per 1000 Workers	Total Employment	Mean Wage - Annual	
High	Registered Nurses	20.2	27,810	\$61,030	^
	Nursing Assistants	16.2	22,290	\$26,210	
	Personal Care Aides	15.6	21,450	\$21,920	
	Waiters and Waitresses	15.4	21,200	\$20,140	
	Teacher Assistants	14.1	19,390	\$24,650	
	Elementary School Teach..	11.9	16,320	\$51,020	
	Cooks, Restaurant	8.0	11,050	\$23,640	
	First-Line Supervisors of F..	7.8	10,710	\$31,750	
	Landscaping and Grounds..	6.2	8,490	\$30,320	
	Licensed Practical and Lic..	5.5	7,510	\$43,240	
	Tellers	4.4	6,030	\$28,150	
	Police and Sheriff's Patrol..	4.3	5,920	\$48,350	
	Bus Drivers, School or Spe..	4.2	5,770	\$29,290	
	Carpenters	4.1	5,580	\$43,300	
	Bartenders	3.5	4,850	\$19,160	
	Meat, Poultry, and Fish Cu..	3.5	4,840	\$31,050	
	Medical Assistants	3.1	4,240	\$31,400	
	Dining Room and Cafeteri..	3.0	4,180	\$20,130	
	Hosts and Hostesses, Res..	3.0	4,080	\$18,610	
	Social and Human Service ..	2.9	3,980	\$33,620	
	Firefighters	2.8	3,790	\$37,930	
	Pharmacy Technicians	2.8	3,780	\$32,940	

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Essential Businesses – Stay-at-home



Essential – Kansas retail sales

	2019 Sales	% of Total Sales
Total 2019 Taxable Retail Sales	\$ 43,732,516,024.15	100%
Essential Industries	\$ 32,054,794,560.62	73.3%
Non-Essential Industries	\$ 11,671,436,431.54	26.7%

Sources: CEDBR, KS Dept of Revenue

Essential Industries: Top 5 Taxable Retail Sales			
NAICS	Industry Title	2019 Retail Sales	Sales Share
452	General Merchandise Stores	\$ 6,591,960,345	15.1%
722	Food Services and Drinking Places	\$ 4,344,020,909	9.9%
445	Food and Beverage Stores	\$ 3,737,224,474	8.5%
444	Building material and Garden Supply Stores	\$ 2,601,856,338	5.9%
517	Telecommunications	\$ 2,150,899,086	4.9%

Sources: CEDBR, KS Dept of Revenue



Economic Impact



Predictions – Impact

- **St. Louis Fed** - 03-30-2020
 - Unemployment rate - 32%
 - “deep plunge...short-lived”
- **Moody's** – 03-30-2020
 - 20% GDP
- **Michigan RSQE** -
 - 20% GDP
- **Goldman Sachs**– 03-31-2020
 - 34% GDP

Scenario

- **Industry focus**

- Manual service sectors
- Supply chain disruptions
- Essential businesses

- **Impacts**

- Production stopped
- Demand/supply chain issues
- Decreased spending
- Decreased productivity
- Increased demand

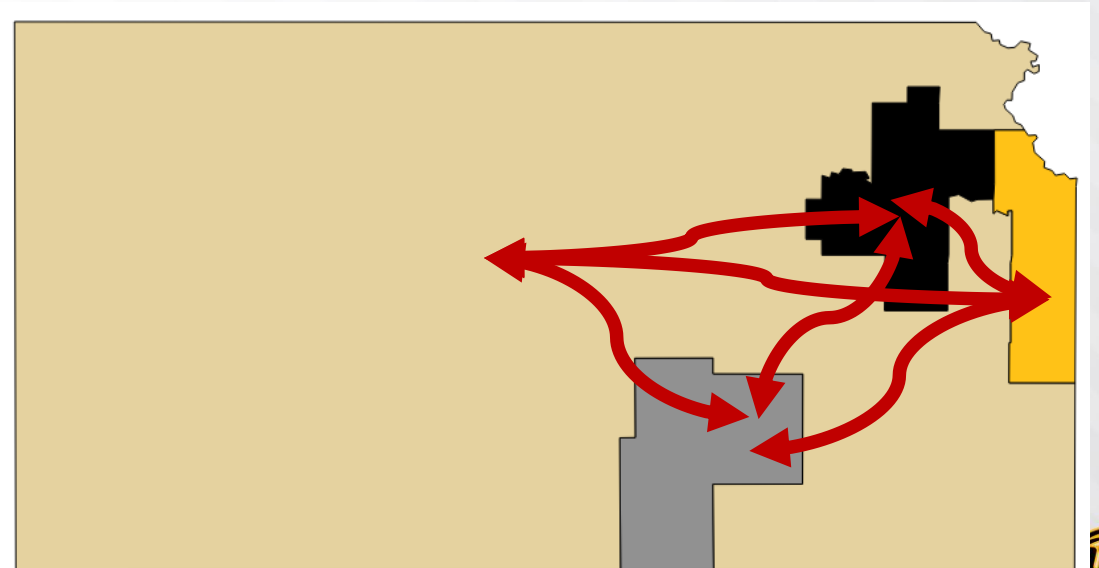
- **Multi-regional interaction**

- **Stimulus funding \$2.2 T**

- Share based on population
- Household spending
- Industry demand

- **Timeframe**

- Three months



Employment impact

Three-month cumulative impact		
	Employment	Output
Kansas City	-32%	-31%
Rest of Kansas	-20%	-19%
Topeka	-19%	-22%
Wichita	-35%	-36%
Kansas	-27%	-27%

Kansas

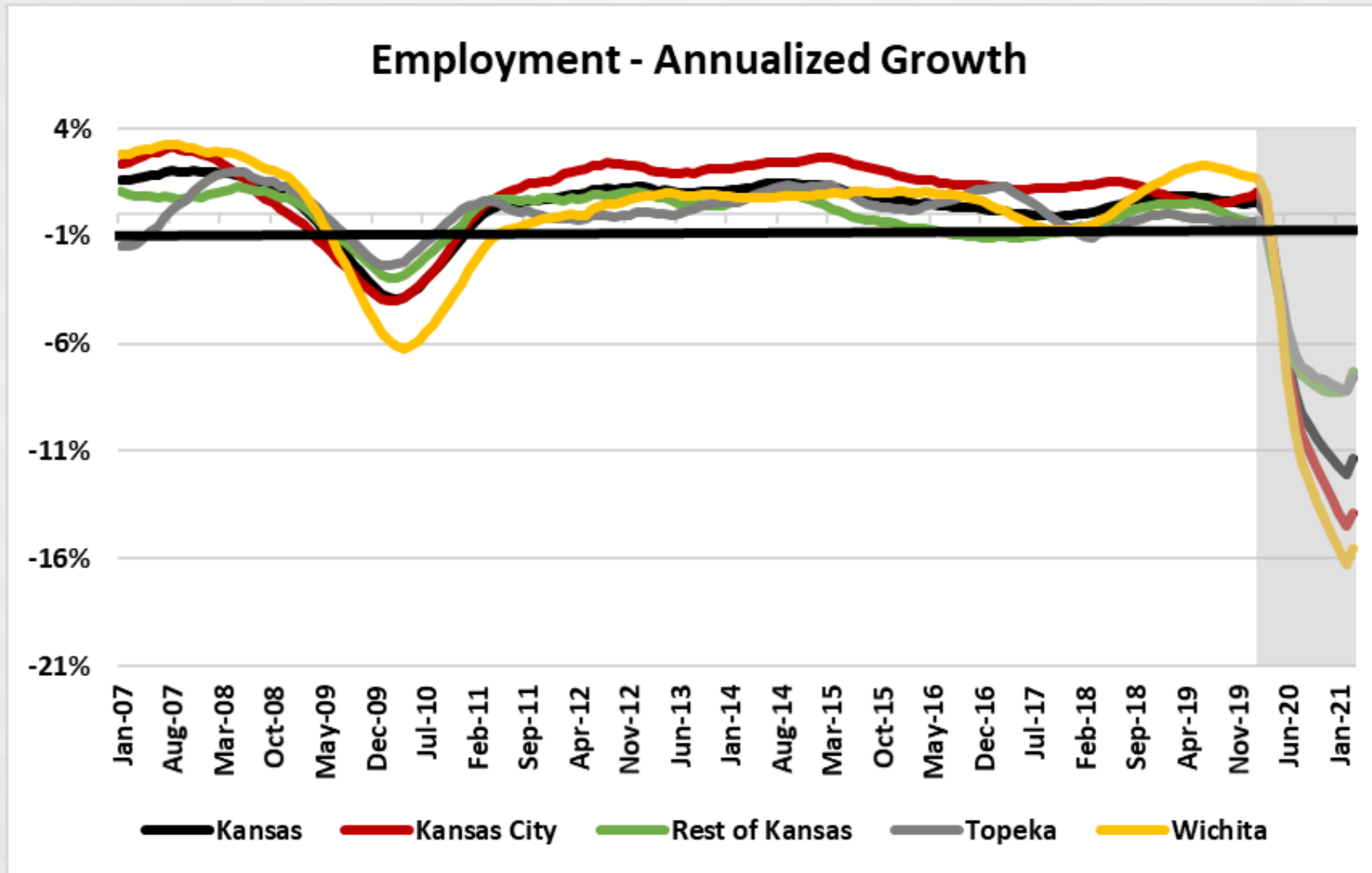
Impact Type	Employment	Labor Income	Value Added	Output
Direct Effect	-208,613	-\$2,439,450,403	-\$4,291,431,978	-\$11,479,677,360
Indirect Effect	-104,125	-\$1,472,368,693	-\$2,305,917,396	-\$4,903,703,165
Induced Effect	-75,168	-\$887,688,735	-\$1,601,355,193	-\$2,831,329,163
Total Effect	-387,907	-\$4,799,507,831	-\$8,198,704,567	-\$19,214,709,687

*Three-month cumulative impact

Regional impact

Total Impact by Type			
	Employment	Labor Income	Output
Kansas City	-156,224	-\$2,170,303,882	-\$7,192,620,652
Rest of Kansas	-103,200	-\$990,324,060	-\$4,772,065,701
Topeka	-21,033	-\$217,092,320	-\$979,054,378
Wichita	-107,450	-\$2,170,303,882	-\$6,270,968,956
Kansas	-387,907	-\$4,799,507,831	-\$19,214,709,687
*Three-month cumulative impact			

Employment Impact



Regional impact

*TIPU = Transportation, Information, Power and Utilities