Dickinson County Economic Indicators

Jonathan Norris

Agenda

Current Index
- Employment, Wages, Durable/Nondurable consumer goods, Oil Production, Wheat prices, Inflation

Healthy-Wealthy-Wise Index
- Household perspective
- Labor force risk, opportunity, and education
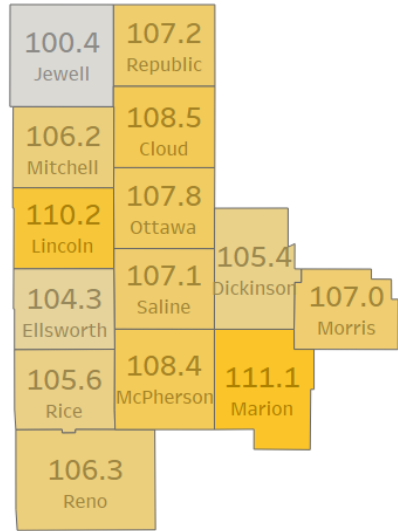
Business Dynamism Index
- Firm perspective
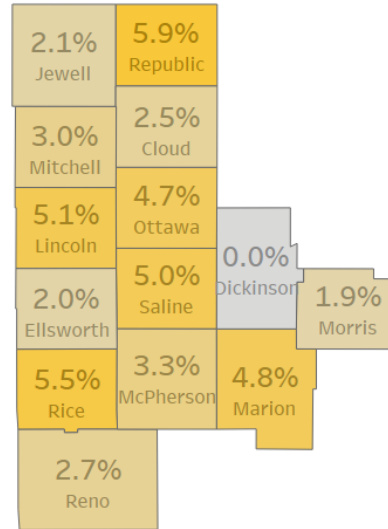- Examining the economic engine

Government Vitality Index
- Government perspective
- Market, core economic driver, and fiscal growth indicators

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Current Index

2022 Current Index

100.4 Jewell	107.2 Republic
106.2 Mitchell	108.5 Cloud
110.2 Lincoln	107.8 Ottawa
104.3 Ellsworth	107.1 Saline	105.4 Dickinson	107.0 Morris
105.6 Rice	108.4 McPherson	111.1 Marion
106.3 Reno	

Y/Y Current Index Growth – 2021-22

2.1% Jewell	5.9% Republic
3.0% Mitchell	2.5% Cloud
5.1% Lincoln	4.7% Ottawa
2.0% Ellsworth	5.0% Saline	0.0% Dickinson	1.9% Morris
5.5% Rice	3.3% McPherson	4.8% Marion
2.7% Reno	

Current Index

Legend: ▬ Dickinson ▬ Kansas

Source: CEDBR

- Regionally, all counties are better off than in 2017 (the base year)

- Dickinson County historically exceeded the state average, until 2019

- Manufacturing boosted county through 2021, though fluctuating employment in 2022 brought it lower than the state average
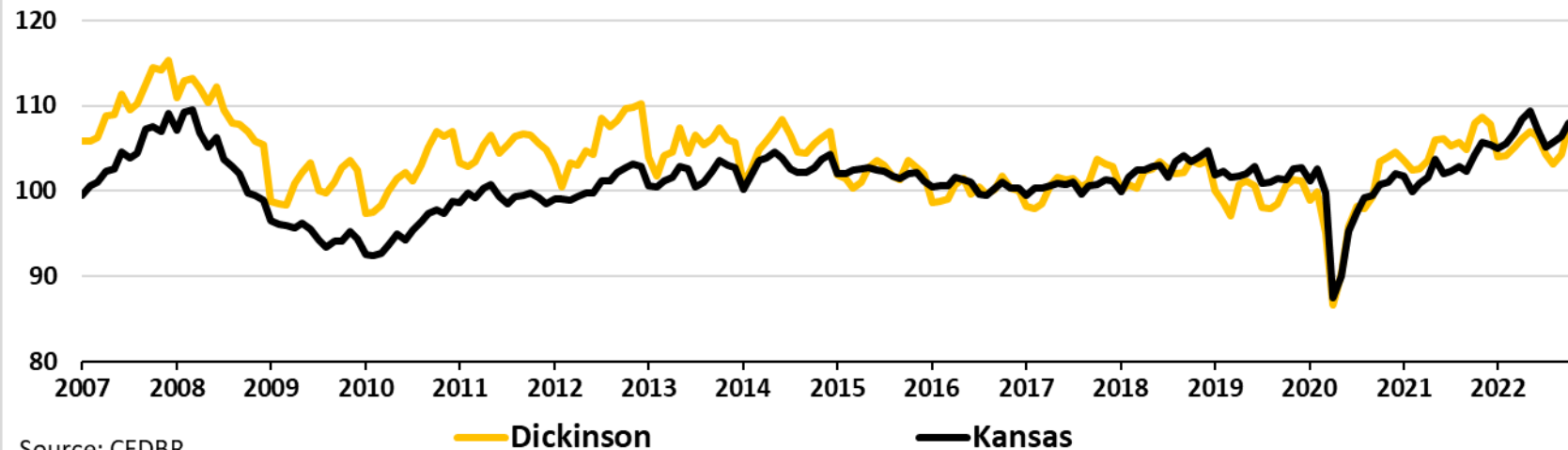
Healthy, Wealthy, and Wise – Kansas ranks near the national median

U.S. Healthy-Wealthy-Wise Index, 2024

Rank 1 — 5
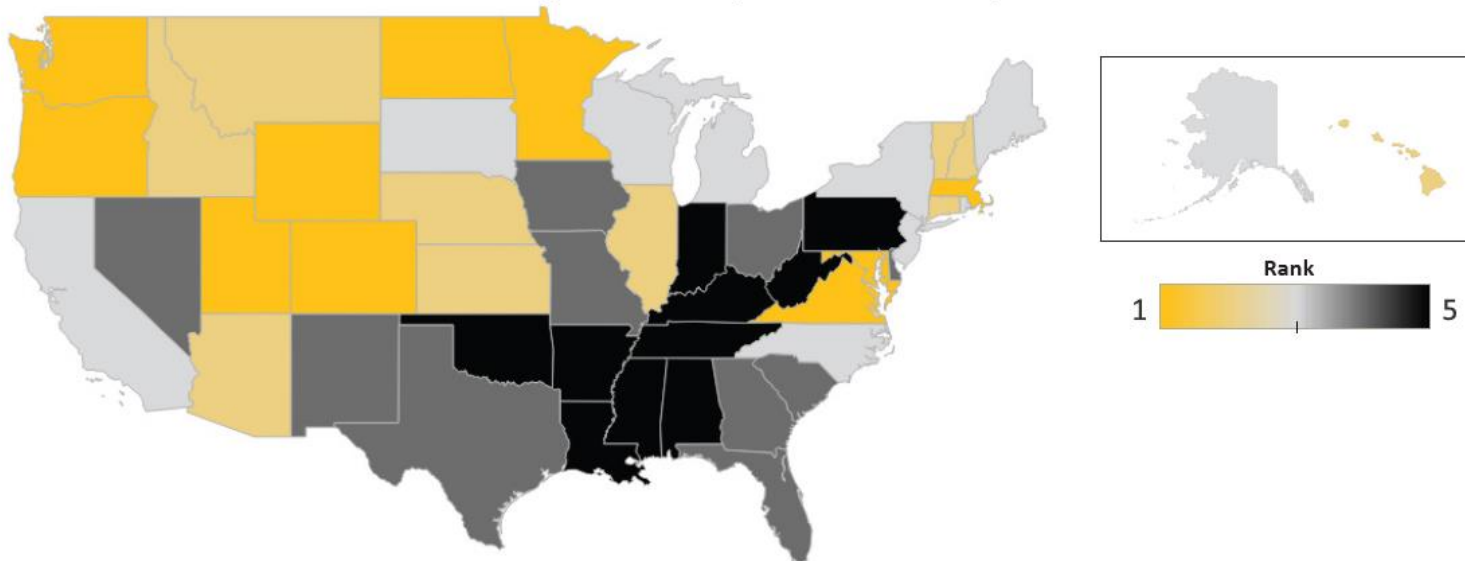
- **Healthy** – Near Median
  - **High obesity**
  - **Low birthweights**
- **Wealthy** – Near Median
  - **Low wealth polarization**
  - **Lagging incomes**
- **Wise** – Above Median
  - **Associate and Bachelor**

Kansas Healthy-Wealthy-Wise Index 2024

		Rank	Value
Healthy	Obesity Rate	4	35.8%
	Low Birthweight Rate	2	7.2%
	Preventable Hospitalization Rate	3	2.7%
Wealthy	Gini Coefficient	2	0.46
	Median Household Income	4	$69,747
	Poverty Rate	3	11.6%
Wise	Associate Degrees	2	31.4%
	Bachelor Degrees	2	21.7%
	Advanced Degrees	3	13.0%

Neighboring State Ranks

State	HWW Index	Healthy	Wealthy	Wise
Colorado	1	2	1	1
Kansas	3	3	3	2
Missouri	4	4	4	4
Nebraska	2	3	2	2
Oklahoma	5	4	4	5

Midwest Region

- Colorado and Nebraska **lead**
- Missouri and Oklahoma **lag**

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Dickinson County ranked above median in household conditions

Healthy-Wealthy-Wise 2024				
County	Healthy-Wealthy-Wise Index	Healthy	Wealthy	Wise
Cloud	1	2	4	1
Dickinson	2	3	2	2
Ellsworth	2	3	2	3
Jewell	5	4	5	4
Lincoln	3	4	4	1
Marion	1	1	3	1
McPherson	3	1	1	5
Mitchell	3	3	3	1
Morris	3	1	4	4
Ottawa	1	1	1	1
Reno	3	2	4	3
Republic	1	1	2	2
Rice	2	3	2	2
Saline	2	2	3	2

- **Healthy:** Near Median

- **Wealthy:** Above Median

- **Wise:** Above Median

- North Central Kansas has strong households overall

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Healthy – Concerns with birthweight and obesity, but dramatic improvement in preventable hospitalizations
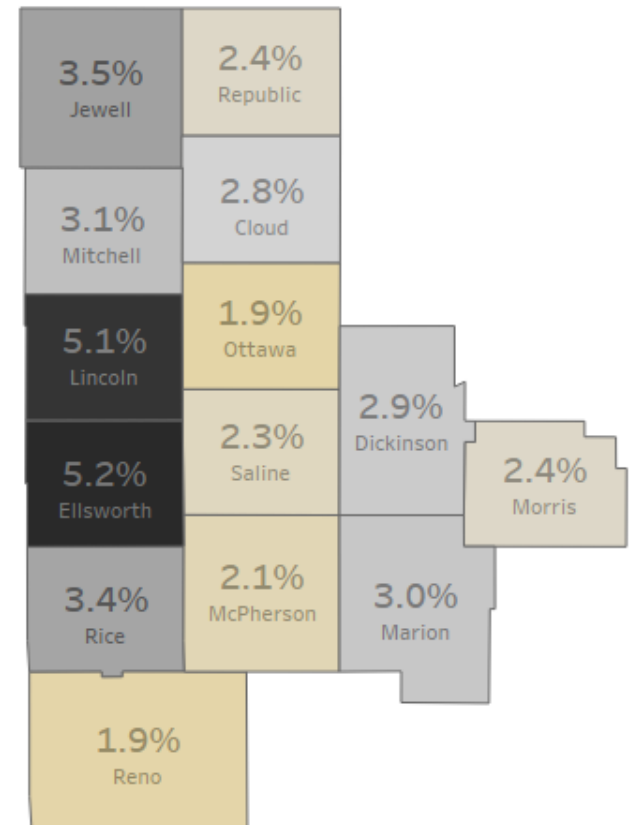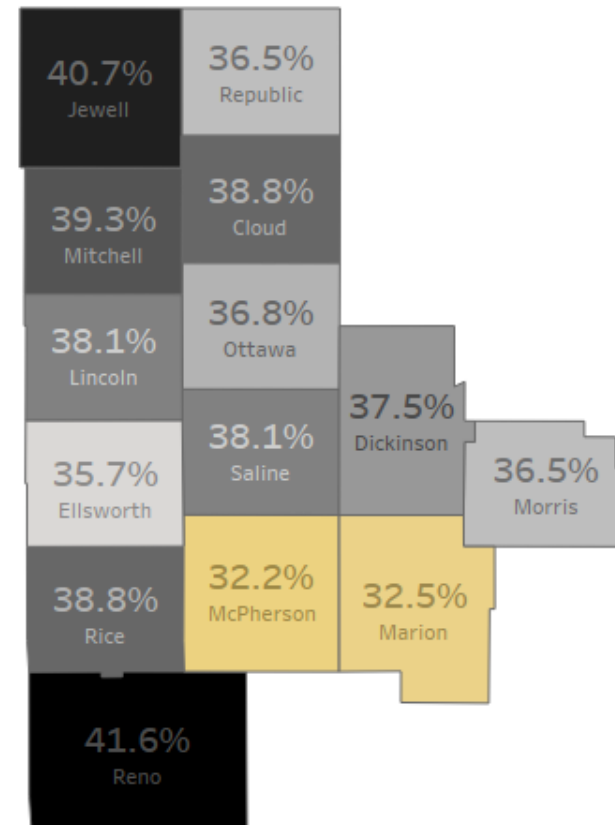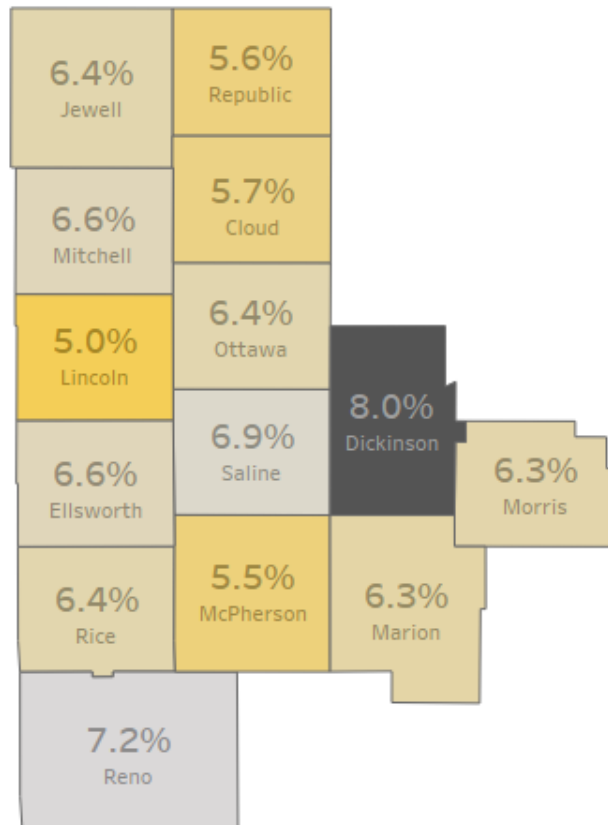
Low Birthweight Rate	2018	2022	Growth
Kansas	7.0%	7.2%	0.2%
Dickinson	7.0%	8.0%	1.0%

Obesity Rate	2018	2022	Growth
Kansas	32.4%	35.8%	3.4%
Dickinson	32.2%	37.5%	5.3%

Preventable Hospitalizations Rate	2018	2022	Growth
Kansas	5.1%	2.7%	-2.4%
Dickinson	6.9%	2.9%	-4.0%

Low Birthweight Rate map

- 6.4% Jewell
- 5.6% Republic
- 6.6% Mitchell
- 5.7% Cloud
- 5.0% Lincoln
- 6.4% Ottawa
- 8.0% Dickinson
- 6.6% Ellsworth
- 6.9% Saline
- 6.3% Morris
- 6.4% Rice
- 5.5% McPherson
- 6.3% Marion
- 7.2% Reno

Obesity Rate map

- 40.7% Jewell
- 36.5% Republic
- 39.3% Mitchell
- 38.8% Cloud
- 38.1% Lincoln
- 36.8% Ottawa
- 37.5% Dickinson
- 35.7% Ellsworth
- 38.1% Saline
- 36.5% Morris
- 38.8% Rice
- 32.2% McPherson
- 32.5% Marion
- 41.6% Reno

Preventable Hospitalizations Rate map

- 3.5% Jewell
- 2.4% Republic
- 3.1% Mitchell
- 2.8% Cloud
- 5.1% Lincoln
- 1.9% Ottawa
- 2.9% Dickinson
- 5.2% Ellsworth
- 2.3% Saline
- 2.4% Morris
- 3.4% Rice
- 2.1% McPherson
- 3.0% Marion
- 1.9% Reno

Wealthy – Very robust middle class, with improving poverty and significant household income growth
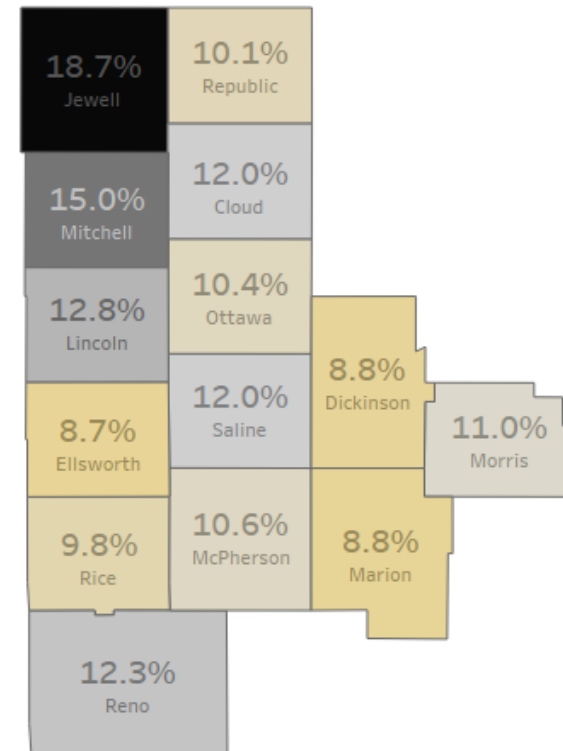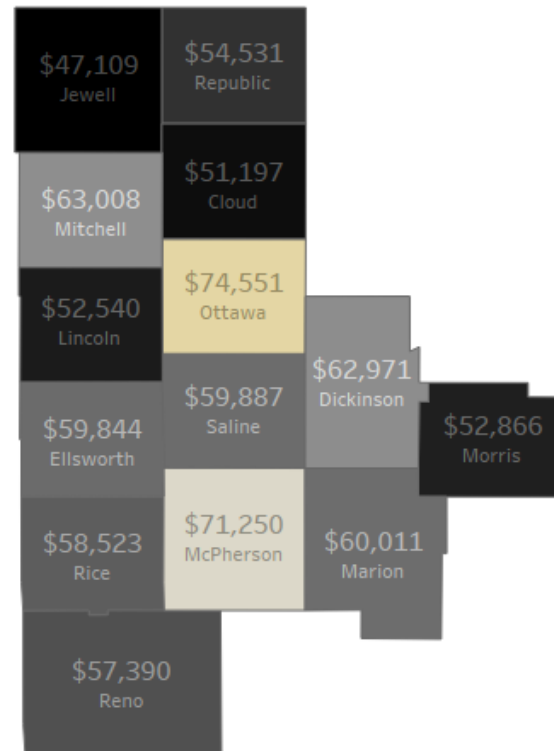
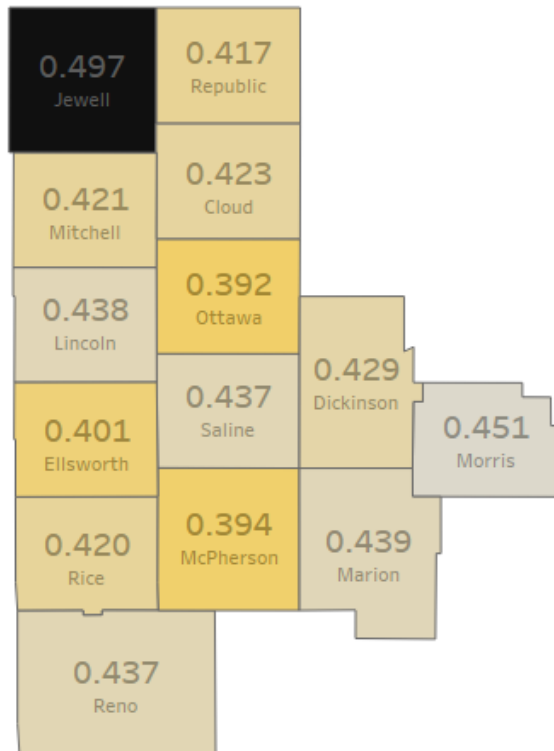| Gini Coefficient			
	2018	2022	Growth
Kansas	0.458	0.458	-0.1%
Dickinson	0.445	0.429	-3.6%

Median Household Income			
	2018	2022	Growth
Kansas	$ 57,422	$ 69,747	21.5%
Dickinson	$ 48,167	$ 62,971	30.7%

Poverty Rate			
	2018	2022	Growth
Kansas	12.4%	11.6%	-0.8%
Dickinson	11.6%	8.8%	-2.8%

Wise – Strong skilled trades and associate degree holders, with growing bachelor degrees

Total Education	2018	2022	Growth
Kansas	64.7%	66.1%	1.4%
Dickinson	57.1%	61.9%	4.8%

Some College and Associate Degrees

	2018	2022	Growth
Kansas	31.8%	31.4%	-0.4%
Dickinson	35.0%	38.4%	3.4%

Bachelor Degrees

	2018	2022	Growth
Kansas	20.8%	21.7%	0.9%
Dickinson	15.5%	16.8%	1.3%

Advanced Degrees

	2018	2022	Growth
Kansas	12.1%	13.0%	0.9%
Dickinson	6.6%	6.7%	0.1%

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Business Dynamism – Kansas fell behind (Note 2018-2022)

U.S. Business Dynamism Index, 2024

Rank
1 ───── 5

- **Labor churn** – Below Median

- **Diversification** – Near Median

- **Growth** – Bottom 20% of States

Kansas Business Dynamism Index 2024
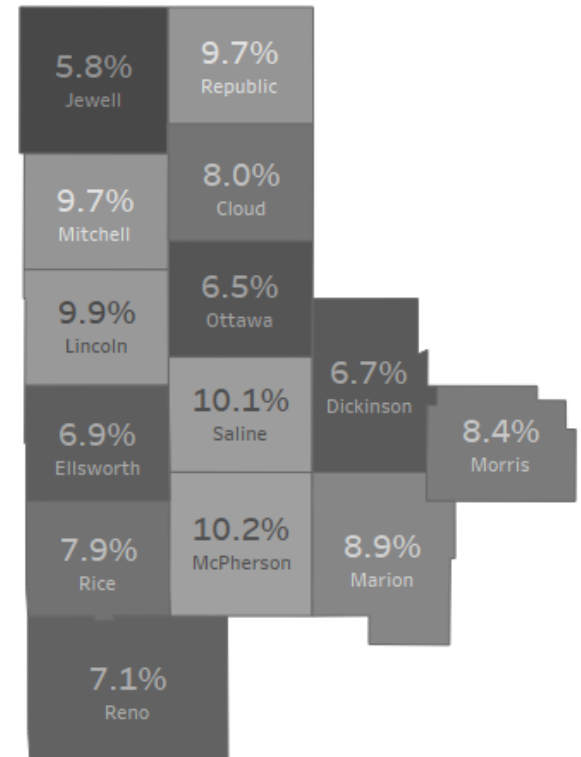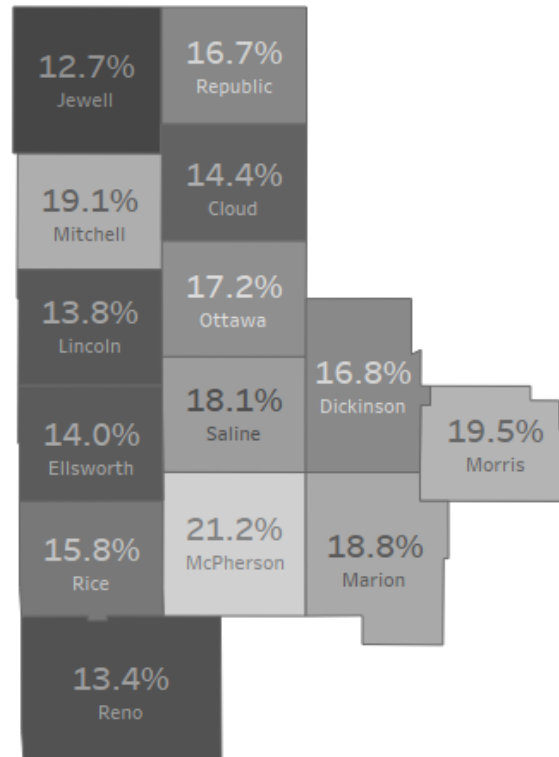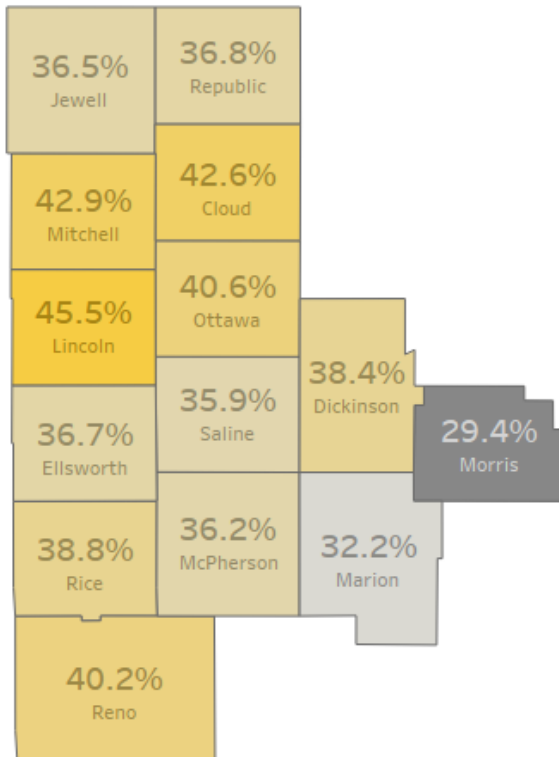
		Rank	Value
Labor Churn	New Hires	3	15.2%
	Separations	3	16.3%
Economic Diversification	Employment	3	97.4
	Establishments	4	89.7
	Wages	2	96.0
Economic Growth	Employment Growth	4	0.6%
	Establishments Growth	5	5.0%
	Wages Growth	4	21.2%

Neighbor State Dynamism Ranks

State	Business Dynamism	Labor Churn	Economic Diversification	Economic Growth
Colorado	3	4	3	2
Kansas	4	4	3	5
Missouri	3	4	2	3
Nebraska	3	3	2	4
Oklahoma	5	5	4	5

Midwest Region

- Colorado, Nebraska, and Missouri **lead**
- Oklahoma **lags**

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# Dickinson County ranks near the median in Business Dynamism

Business Dynamism Index Ranks 2024

County	Business Dynamism	Labor Churn	Economic Diversification	Economic Growth
Cloud	1	3	1	2
Dickinson	3	3	2	4
Ellsworth	3	4	3	3
Jewell	4	5	5	5
Lincoln	1	4	3	2
Marion	3	3	2	3
McPherson	2	3	2	3
Mitchell	1	5	3	3
Morris	2	4	3	2
Ottawa	1	5	2	3
Reno	3	1	1	3
Republic	2	3	2	2
Rice	3	1	3	2
Saline	2	1	1	2

- **Labor Churn:** Near Median

- **Economic Diversification:** Above Median

- **Economic Growth:** Below Median

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Labor Churn – Lower job movement may be a risk in evolving markets, but there are advantages in retention

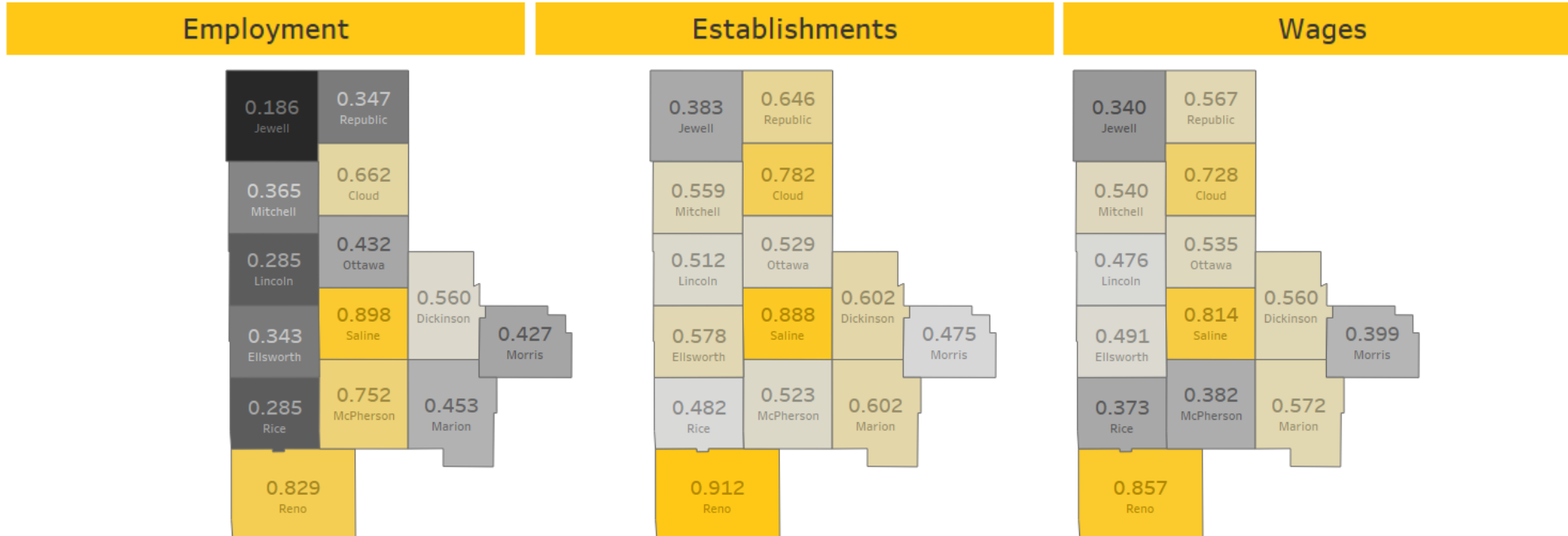| New Hires				Separations			
	2018	2022	Growth		2018	2022	Growth
Kansas	14.3%	15.2%	0.9%	Kansas	15.7%	16.3%	0.6%
Dickinson	10.7%	11.4%	0.7%	Dickinson	13.2%	13.9%	0.7%
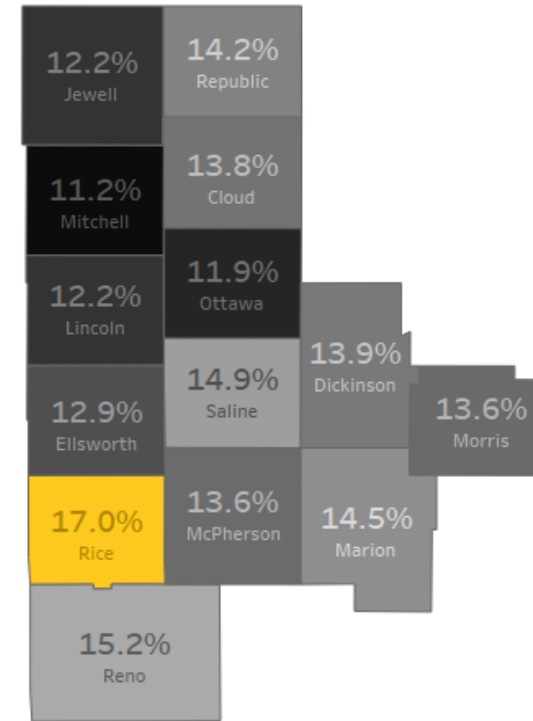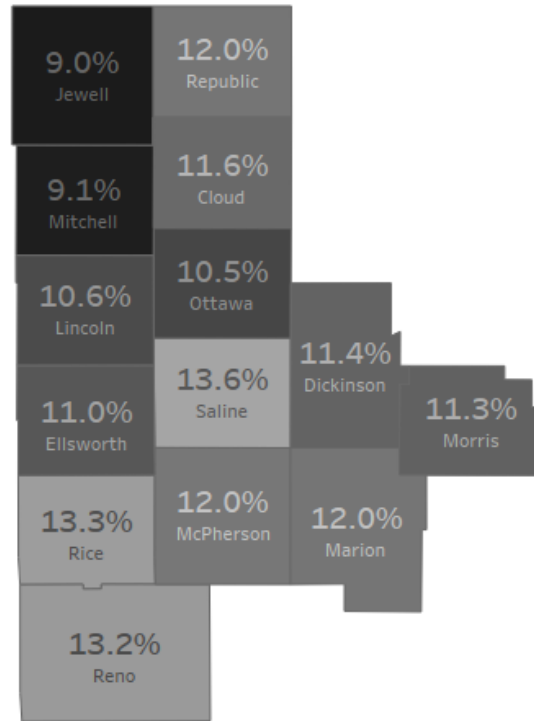
- We are **not at the new labor market equilibrium**
- Separations are not an inherent negative

- Labor mobility **drives skill-job matching** (optimization)
- Drives growth in productivity

Diversification – moderate diversity, but highly concentrated in natural resources, manufacturing and complementary transport

Employment	Establishments	Wages

- Two perspectives –
  - Diversity weathers economic cycles
  - Economies of Agglomeration
    - Industry-driven

Concentration

Industry	Employment	Wages
Natural Resources and Mining	1.67	1.61
Construction	0.69	0.77
Manufacturing	3.14	3.24
Trade, Transportation, and Utilities	1.08	1.38
Information	0.44	0.63
Financial Activities	0.64	0.48
Professional and Business Services	0.30	0.22
Education and Health Services	0.56	0.57
Leisure and Hospitality	0.58	0.54
Other Services	0.87	0.81

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5-Year Expansion – lagging growth rates, particularly employment

Employment			
	2018	2022	Growth
Kansas			
	1,383,119	1,390,817	0.6%
Dickinson	6,365	5,942	-6.6%

Establishments			
	2018	2022	Growth
Kansas			
	88,793	93,245	5.0%
Dickinson	509	529	3.9%

Wages			
($millions)	2018	2022	Growth
Kansas			
	64,463	78,133	21.2%
Dickinson	211	248	17.6%
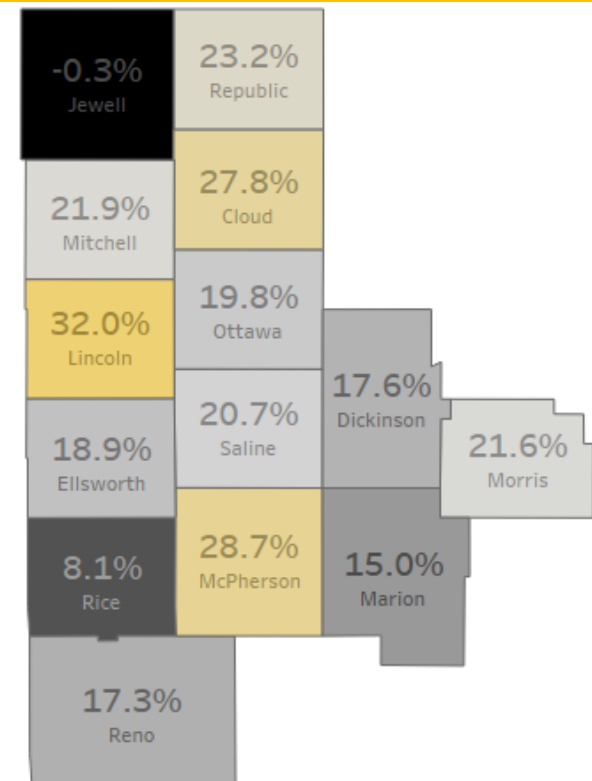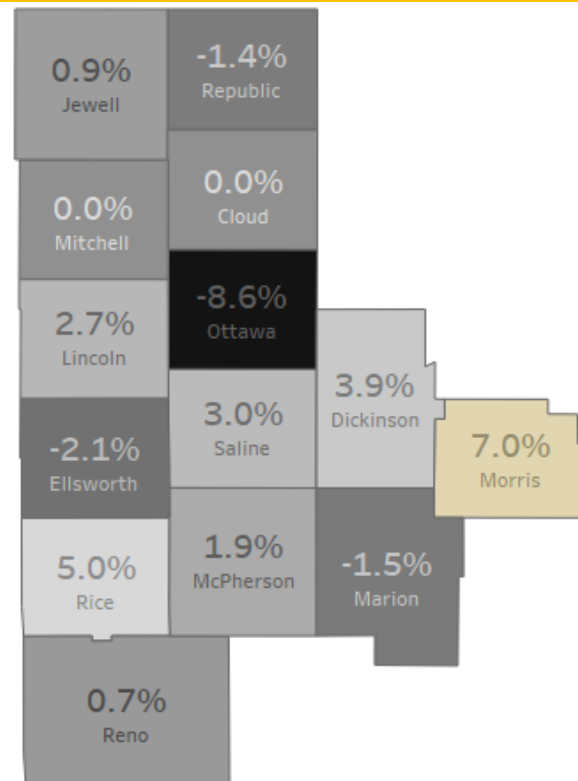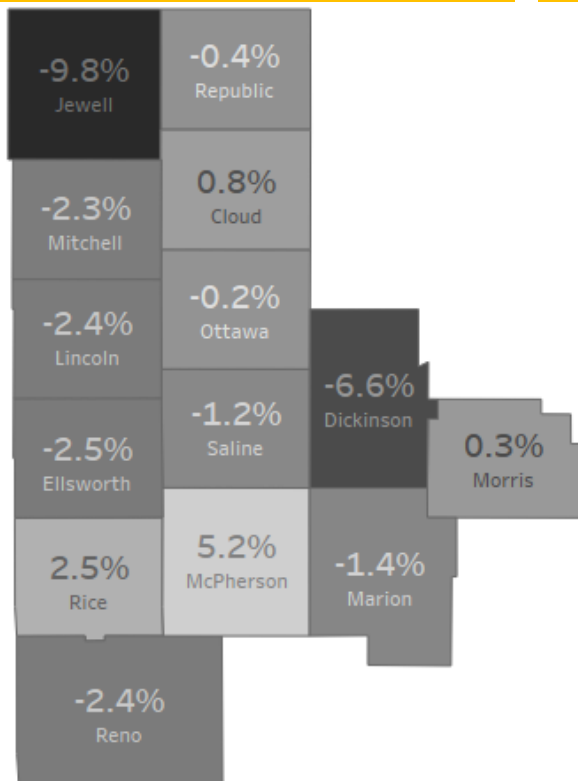
Employment map:
- -9.8% Jewell
- -0.4% Republic
- -2.3% Mitchell
- 0.8% Cloud
- -2.4% Lincoln
- -0.2% Ottawa
- -2.5% Ellsworth
- -1.2% Saline
- -6.6% Dickinson
- 0.3% Morris
- 2.5% Rice
- 5.2% McPherson
- -1.4% Marion
- -2.4% Reno

Establishments map:
- 0.9% Jewell
- -1.4% Republic
- 0.0% Mitchell
- 0.0% Cloud
- 2.7% Lincoln
- -8.6% Ottawa
- -2.1% Ellsworth
- 3.0% Saline
- 3.9% Dickinson
- 7.0% Morris
- 5.0% Rice
- 1.9% McPherson
- -1.5% Marion
- 0.7% Reno

Wages map:
- -0.3% Jewell
- 23.2% Republic
- 21.9% Mitchell
- 27.8% Cloud
- 32.0% Lincoln
- 19.8% Ottawa
- 18.9% Ellsworth
- 20.7% Saline
- 17.6% Dickinson
- 21.6% Morris
- 8.1% Rice
- 28.7% McPherson
- 15.0% Marion
- 17.3% Reno

Dickinson County ranks near the median in Government Vitality

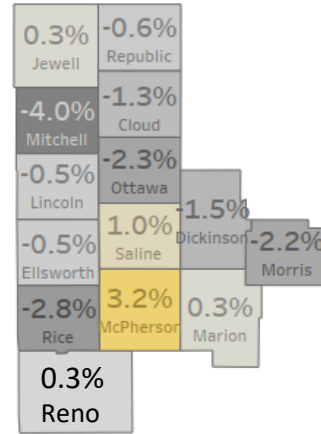| Government Vitality Index 2024				
County	Government Vitality	Economic Drivers	Market Growth	Fiscal Growth
Cloud	3	4	1	4
Dickinson	3	3	4	2
Ellsworth	5	5	4	4
Jewell	2	2	5	1
Lincoln	3	1	3	5
Marion	3	1	5	3
McPherson	1	3	2	2
Mitchell	3	4	1	4
Morris	3	4	3	2
Ottawa	1	1	3	3
Reno	4	4	3	4
Republic	3	2	5	2
Rice	2	4	2	2
Saline	3	4	3	2

- **Economic Drivers:** Near Median

- **Market Growth:** Below Median

- **Fiscal Growth:** Above Median
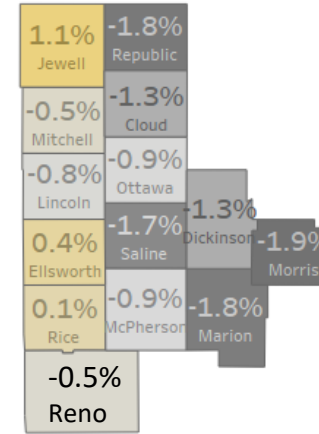
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Economic Drivers – Near median overall

Median Home Value Growth

36.7% Jewell	40.1% Republic
23.4% Mitchell	23.6% Cloud
60.5% Lincoln	74.3% Ottawa
4.5% Ellsworth	27.2% Saline / 30.3% Dickinson / 27.4% Morris
26.5% Rice	31.1% McPherson / 52.8% Marion
24.9% Reno	

Inward Mobility Growth

0.3% Jewell	-0.6% Republic
-4.0% Mitchell	-1.3% Cloud
-0.5% Lincoln	-2.3% Ottawa
-0.5% Ellsworth	1.0% Saline / -1.5% Dickinson / -2.2% Morris
-2.8% Rice	3.2% McPherson / 0.3% Marion
0.3% Reno	

Prime Age Growth

1.1% Jewell	-1.8% Republic
-0.5% Mitchell	-1.3% Cloud
-0.8% Lincoln	-0.9% Ottawa
0.4% Ellsworth	-1.7% Saline / -1.3% Dickinson / -1.9% Morris
0.1% Rice	-0.9% McPherson / -1.8% Marion
-0.5% Reno	

Median Home Value

$80,400 Jewell	$107,300 Republic
$105,300 Mitchell	$99,500 Cloud
$122,000 Lincoln	$183,400 Ottawa
$104,300 Ellsworth	$163,200 Saline / $158,700 Dickinson / $146,500 Morris
$110,900 Rice	$187,600 McPherson / $125,300 Marion
$129,400 Reno	

Inward Mobility Share

4.8% Jewell	4.2% Republic
4.1% Mitchell	7.2% Cloud
6.8% Lincoln	3.2% Ottawa
9.5% Ellsworth	7.7% Saline / 5.8% Dickinson / 5.1% Morris
7.9% Rice	9.3% McPherson / 5.7% Marion
6.8% Reno	

Prime Age Share

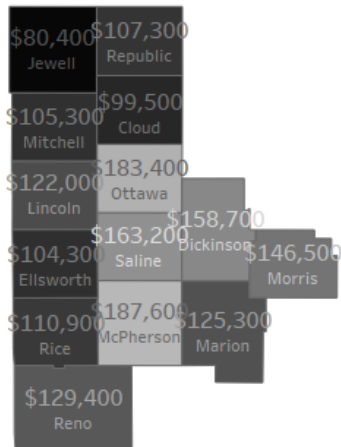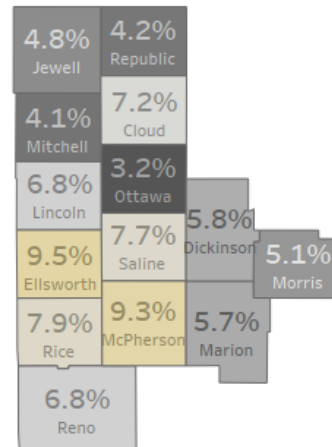|	
29.5% Jewell	28.6% Republic
30.6% Mitchell	32.3% Cloud
30.0% Lincoln	34.3% Ottawa
37.9% Ellsworth	35.5% Saline / 34.9% Dickinson / 31.0% Morris
31.9% Rice	33.6% McPherson / 29.8% Marion
35.3% Reno	

- Median home values have grown slightly slower than statewide, but prices are moderate

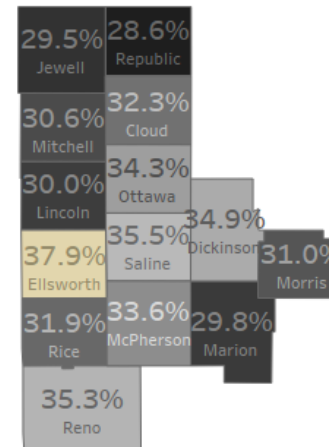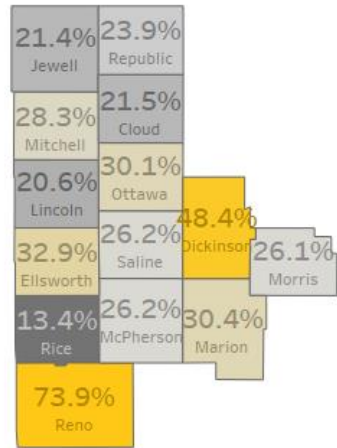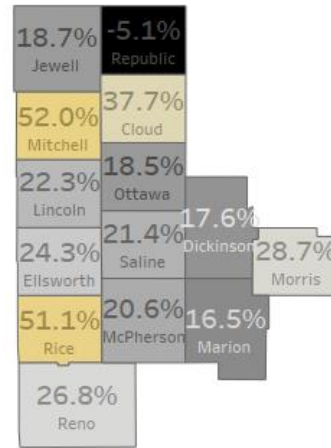- Inward mobility has declined, and is low among regional counties

- Prime age share has declined, and is among the upper level for the region

Market Growth – Below median overall

Income Per Capita Growth
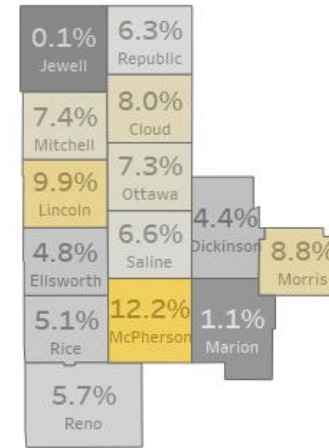
21.4% Jewell	23.9% Republic
28.3% Mitchell	21.5% Cloud
20.6% Lincoln	30.1% Ottawa
32.9% Ellsworth	26.2% Saline / 48.4% Dickinson / 26.1% Morris
13.4% Rice	26.2% McPherson / 30.4% Marion
73.9% Reno	

GDP Growth

18.7% Jewell	-5.1% Republic
52.0% Mitchell	37.7% Cloud
22.3% Lincoln	18.5% Ottawa
24.3% Ellsworth	21.4% Saline / 17.6% Dickinson / 28.7% Morris
51.1% Rice	20.6% McPherson / 16.5% Marion
26.8% Reno	

Current Index Growth

0.1% Jewell	6.3% Republic
7.4% Mitchell	8.0% Cloud
9.9% Lincoln	7.3% Ottawa
4.8% Ellsworth	6.6% Saline / 4.4% Dickinson / 8.8% Morris
5.1% Rice	12.2% McPherson / 1.1% Marion
5.7% Reno	

Income Per Capita

$53,560 Jewell	$47,727 Republic
$59,222 Mitchell	$47,517 Cloud
$50,002 Lincoln	$49,275 Ottawa
$56,016 Ellsworth	$52,834 Saline / $60,732 Dickinson / $43,912 Morris
$46,289 Rice	$46,782 McPherson / $57,557 Marion
$76,456 Reno	

GDP ($millions)

$91K Jewell	$192K Republic
$582K Mitchell	$477K Cloud
$143K Lincoln	$139K Ottawa
$311K Ellsworth	$3,544K Saline / $759K Dickinson / $225K Morris
$725K Rice	$2,399K McPherson / $410K Marion
$3,130K Reno	

Current Index

|	
100.06 Jewell	107.01 Republic
106.14 Mitchell	108.44 Cloud
109.86 Lincoln	107.59 Ottawa
104.22 Ellsworth	106.91 Saline / 105.28 Dickinson / 107.19 Morris
105.17 Rice	110.94 McPherson / 106.34 Marion
106.26 Reno	

- Income per capita growth far above statewide average, and the level is second highest for the region

- GDP has grown by slightly less than the state

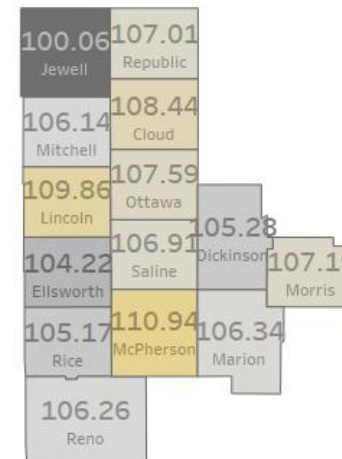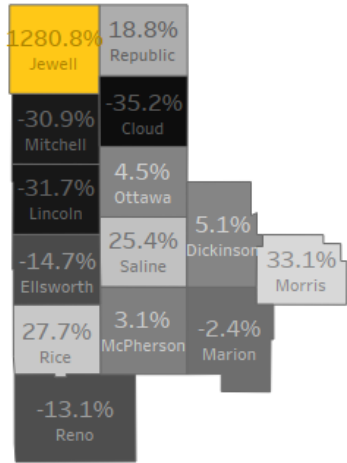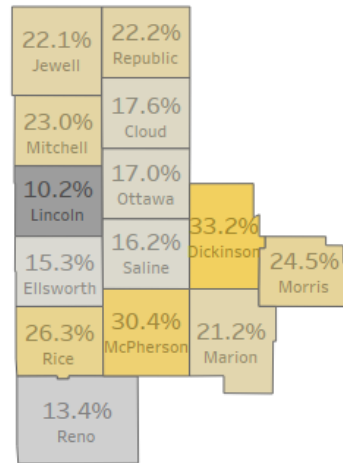- Current Index level and growth slightly below state average
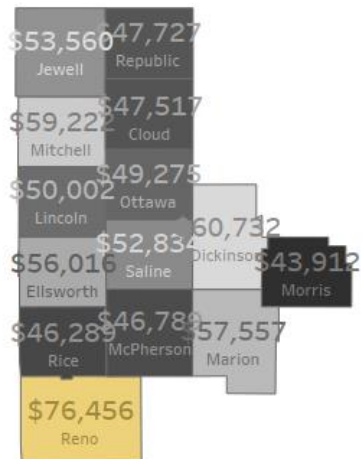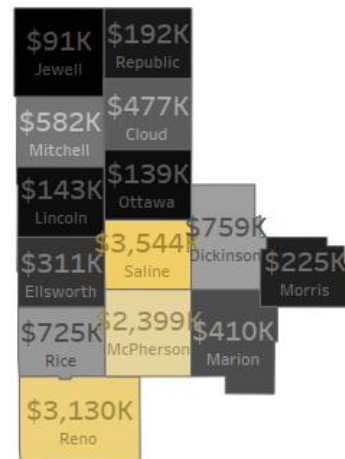
Fiscal Growth – Above median overall

Per Capita Bonds Growth

Per-Capita Property Tax Collections Growth

Per-Capita Retail Sales Growth
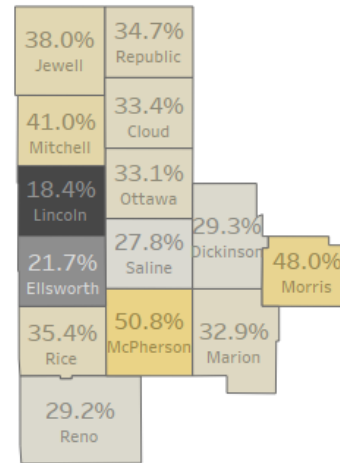
Per Capita Bonds

Per-Capita Property Tax Collections
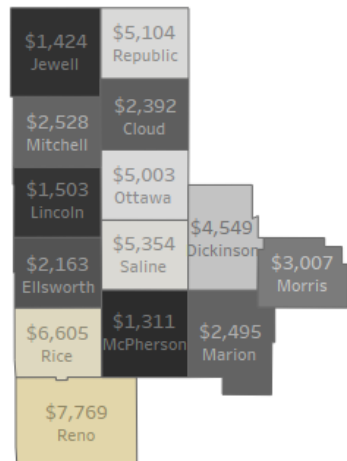
Per-Capita Retail Sales

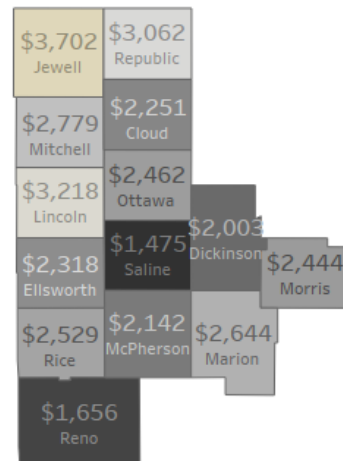- Per capita bonds growth was slower than average, but is moderate for the region in level

- Per capita property tax collections have grown faster than average, but remain low

- Per capita retail sales growth is slightly above average