



A Competitive Realities Report and Targeted Industry Strategy for Harvey County, Kansas

May 8, 2017

Prepared for the:





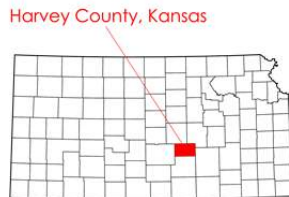
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EXECUTIVE SUMMARY

In January 2017, the Harvey County Economic Development Council, Inc. (HCEDC) retained the firm of Garner Economics, LLC to develop a **Target Industry Strategy (TIS)** and conduct a **Competitive Analysis** of the County that takes into account the current state of the community's economic assets. The TIS provides a roadmap for the County to create economic opportunities for its citizens by targeting industries that are a good fit for the area.



The focus of this engagement was to compile data, provide comparisons, and offer observations so that the HCEDC and its partners understand optimal targets for the area and the value the County offers to those targets. Given this information, HCEDC can better work to effectively attract and retain the types of businesses that will create high quality jobs and opportunities for the area population.

Specifically, the scope of services for the overall project included:

1. A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
2. An **Assets & Challenges Assessment (A&C)** of Harvey County from the perspective of a site-location consultant that facilitates investment decisions;
3. Recommendations for business targets suitable for the County, based on our research and analysis; and finally,
4. A set of implementable recommendations that the leadership in the area can utilize to enhance the success ratio of HCEDC's target marketing strategy to these specified business sectors.

Analysis and Assessments

The TIS is a compilation of local and regional facts and data points with quantitative analysis and some subjective opinions. Coupled with the A&C, a Community Engagement process (an electronic survey), an Economic and Labor analysis, a Retail Leakage analysis, and a Local Specialization, Competitiveness & Growth assessment informed the work to identify target industries for the County. These “building blocks” also are the basis upon which the recommendations are built.

Target Industries

The analysis revealed that the County has many assets upon which to build. The resulting TIS identifies and provides the rationale for four core target sectors and one local target that will both diversify the industry mix in Harvey County, as well as build on current areas of strengths. These targets are “best fits” for the County and are recommended, given the attributes and assets of the County as a whole.

The description of, and rationale for, the targets detailed in Chapter 8 will help the HCEDC prioritize marketing resources and will identify areas where policymakers can act to increase the County's competitive position in attracting and retaining these business sectors. Chapter 9 suggests actions the HCEDC or its partners can take to mitigate challenges identified in the various assessments and create a stronger economic development platform to market the region as a whole.

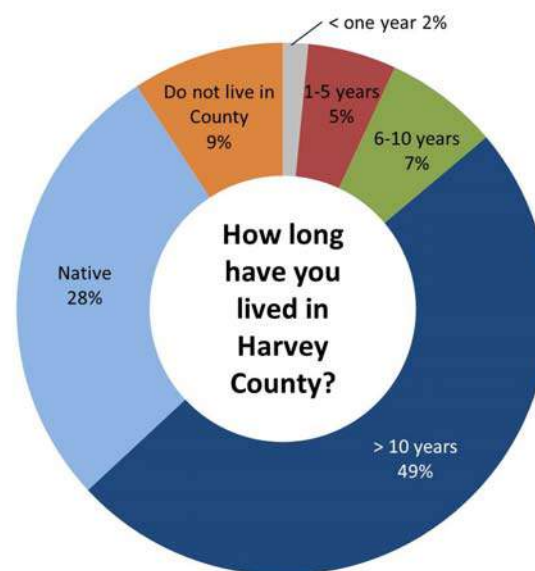
The identified County target industry sectors are:

CORE TARGETS	
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #005596; margin-right: 5px;"></div> <div>Agribusiness & Agricultural Manufacturing</div> </div>	<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #76923c; margin-right: 5px;"></div> <div>Related Target: Food & Beverage Processing</div> </div>
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #c00000; margin-right: 5px;"></div> <div>Industrial Products Manufacturing</div> </div>	
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #ff8c00; margin-right: 5px;"></div> <div>Transportation, Distribution & Wholesale</div> </div>	<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #005596; margin-right: 5px;"></div> <div>Related Target: Aviation & Aerospace</div> </div>
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #76923c; margin-right: 5px;"></div> <div>Health Services</div> </div>	

LOCAL TARGET	
<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #ff0000; margin-right: 5px;"></div> <div>Entrepreneurial, Hospitality & Retail Development</div> </div>	

Stakeholder Input

As a complement to the assessment of the physical and regulatory structure of Harvey County against its benchmarked peers, Garner Economics conducted an electronic survey of a broad group of stakeholders in Harvey County to solicit a variety of perceptions of the County's business climate, industries that would be a good fit for the County, and areas for improvement. The majority of respondents are long-time residents of the County; their feedback validated many of the observations made and the data uncovered by the consulting team.



Recommendations

As noted above, the County has several attributes it can build upon to attract the target industries. The recommendations suggested reflect items the team believes the County should undertake to mitigate negative perceptions of the area by site-location advisors or companies looking to invest in the region.

The recommendations are not meant to be a comprehensive economic development strategy. Rather, they are specific actions the County can take to strengthen its business climate fundamentals in the areas most important to the target industries.

The recommendations are broken into two categories: policy changes and investments that should be made to strengthen the region's product and tactics to market the region better. The latter will allow the HCEDC to tell the area's economic development story better.

Additionally, the resulting recommendations identify areas where HCEDC can act as a catalyst to lead initiatives to improve the area's economic development product. The tactics to market the region to prospective target industry companies are primarily for HCEDC; however, the messaging and brand should be supported by all economic development organizations working to improve Harvey County. By proactive and strategic outreach to those industries, Harvey County can shape its economic future and ensure that there are sufficient economic opportunities for its residents.

TIS Recommendations

Enhance the Product (Policies for Product Improvement)

1. Develop a speculative shell building to attract an investor/company within one of the three targeted industry sectors.
2. Create a culture, programs, and support infrastructure for entrepreneurship in Harvey County.
3. Engage a firm to analyze the County's and/or a specific municipality's best effort to attract retail to enhance the area's quality of place assets.

Tell the Story (Tactics to Market the County)

1. Develop a unified brand for Harvey County.
2. Enhance the HCEDC's marketing tools and tactics in its external outreach efforts.
 - A. Conduct in-market sales missions to Atlanta, New York, Chicago, and Dallas with site-selection consultants.
 - B. Execute a process for lead generation and business target profiling with the targeted companies.
 - C. Enhance the HCEDC website to address the needs of location consultants and potential investors.

Chapter 1: Stakeholder Input



Community input is a vital part of the strategic targeting and planning process. In addition to providing a context around the data accumulated in Phase I of the project, feedback from stakeholders in a community provides a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community; these insights may or may not be discernible through desktop research and onsite tours.

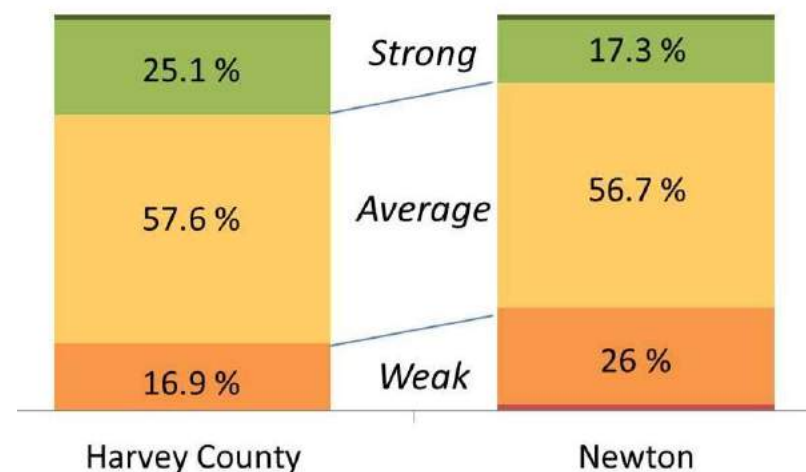
Given this, Garner Economics developed and launched an electronic survey to Harvey County residents to solicit their opinions on the business climate and economic development issues in Harvey County. The survey was open March 21–April 7, 2017, and 133 people responded. The breakdown of the survey respondents is as follows:

	% of respondents
Live in Harvey County*	91
Work in Harvey County	92
Live and work in Harvey County	86

*For the purposes of the above classification, ZIP codes used to define Harvey County are: 67020, 67056, 67062, 67107, 67114, 67117, 67135, 67151, and 67154.

In general, respondents hold a favorable opinion of the business climate and current economic state of the County. Through responses in several questions, respondents noted that Harvey County's proximity to Wichita is both an advantage and inhibitor. They note the competitive advantage the proximity lends in recruiting business but also note the strong competition the County faces with Wichita in recruiting talent and providing retail and recreational activities to County residents. When asked to rank the County's and Newton's business climate on a scale of 1–5, with 5 being extremely strong, respondents ranked Harvey County as "average" (score = 3.03) and Newton as slightly below average (score = 2.78), with average being defined as a score of 3 (Figure 1.1).

FIGURE 1.1: BUSINESS CLIMATE SCORES





Respondents also noted the need to diversify the County’s economic base and find ways to train the current and future workforce to work in different industries. Respondents believe that the County could leverage the existing agriculture and aviation industries to attract *Agribusiness* and *Aviation* support companies. They also suggest exploiting the County’s location—proximate to Wichita and central in the continental United States—to attract distribution activities.

In addition to the advantages of the County’s location, respondents point to the family-friendly atmosphere of the County, its schools, and access to healthcare as strengths. Conversely, respondents point to the lack of amenities and employment opportunities for young professionals, taxes and fees, and an aging infrastructure as inhibitors to business growth.

When asked about initiatives the County should undertake to improve Harvey County’s competitive position as a business location, respondents ranked efforts around thinking and working regionally to improve the County’s quality of place and education assets highest.

The feedback and comments compiled from the stakeholder feedback represent responses provided to the survey questions. Garner Economics recognizes that they may not necessarily be statements of fact, but may be opinions or perceptions.

Figures 1.2–1.6 highlight the feedback in terms of the business climate and overall competitive position of Harvey County. Additional data from the survey is included in Appendix 1.

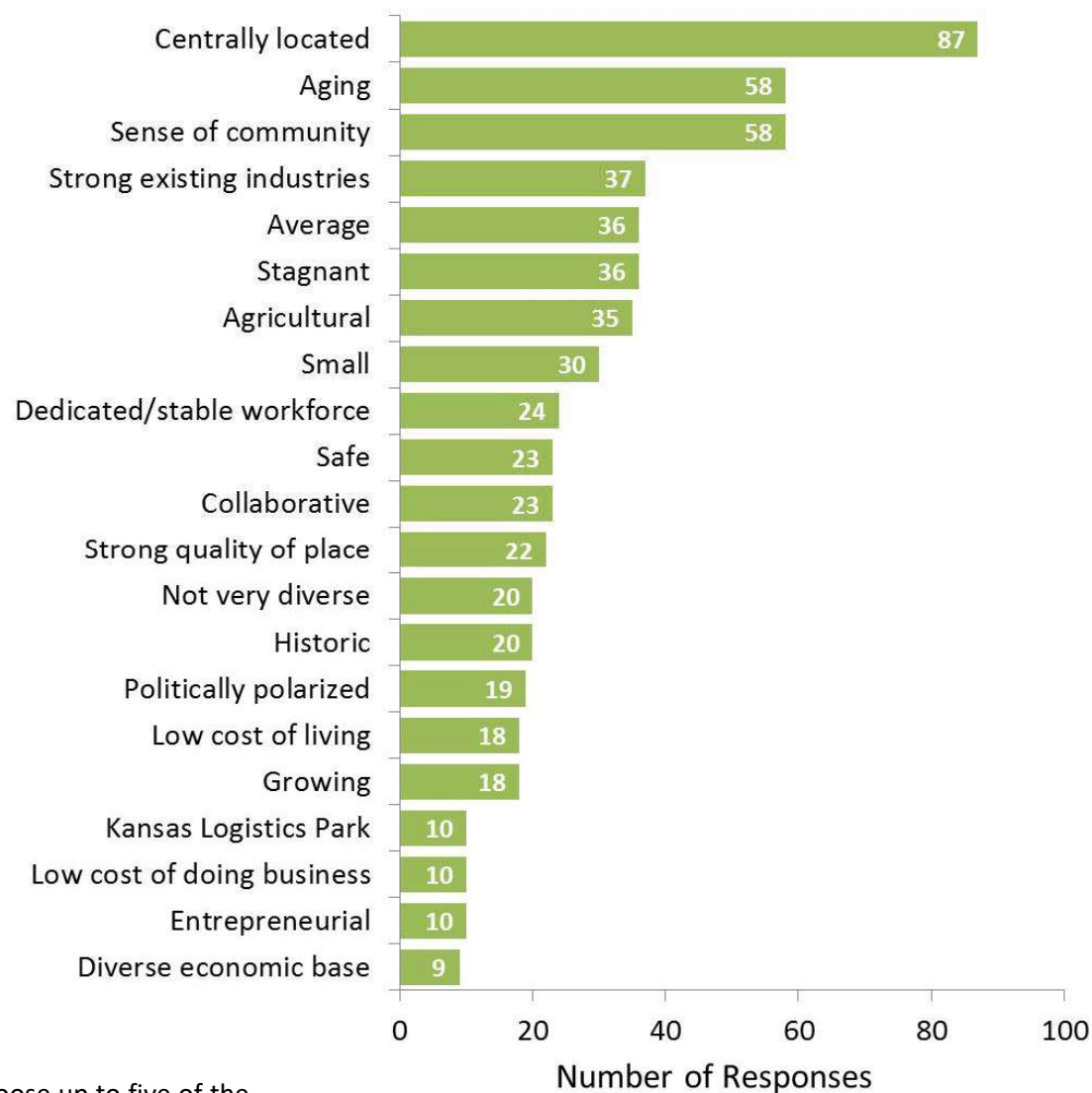
“Community support is key to moving forward. There is an undercurrent of naysayers that have a louder voice than the proponents of County growth. These are the folks who want things to stay ‘just the way they are,’ with no vision for moving forward. There are two types of communities—those that are growing and those that are dying. Harvey County is on the cusp of heading one direction or the other. We need to support for growth.”

—Survey Respondent



FIGURE 1.2: DESCRIBING HARVEY COUNTY

When asked for words or phrases that describe Harvey County, survey respondents responded as follows:*

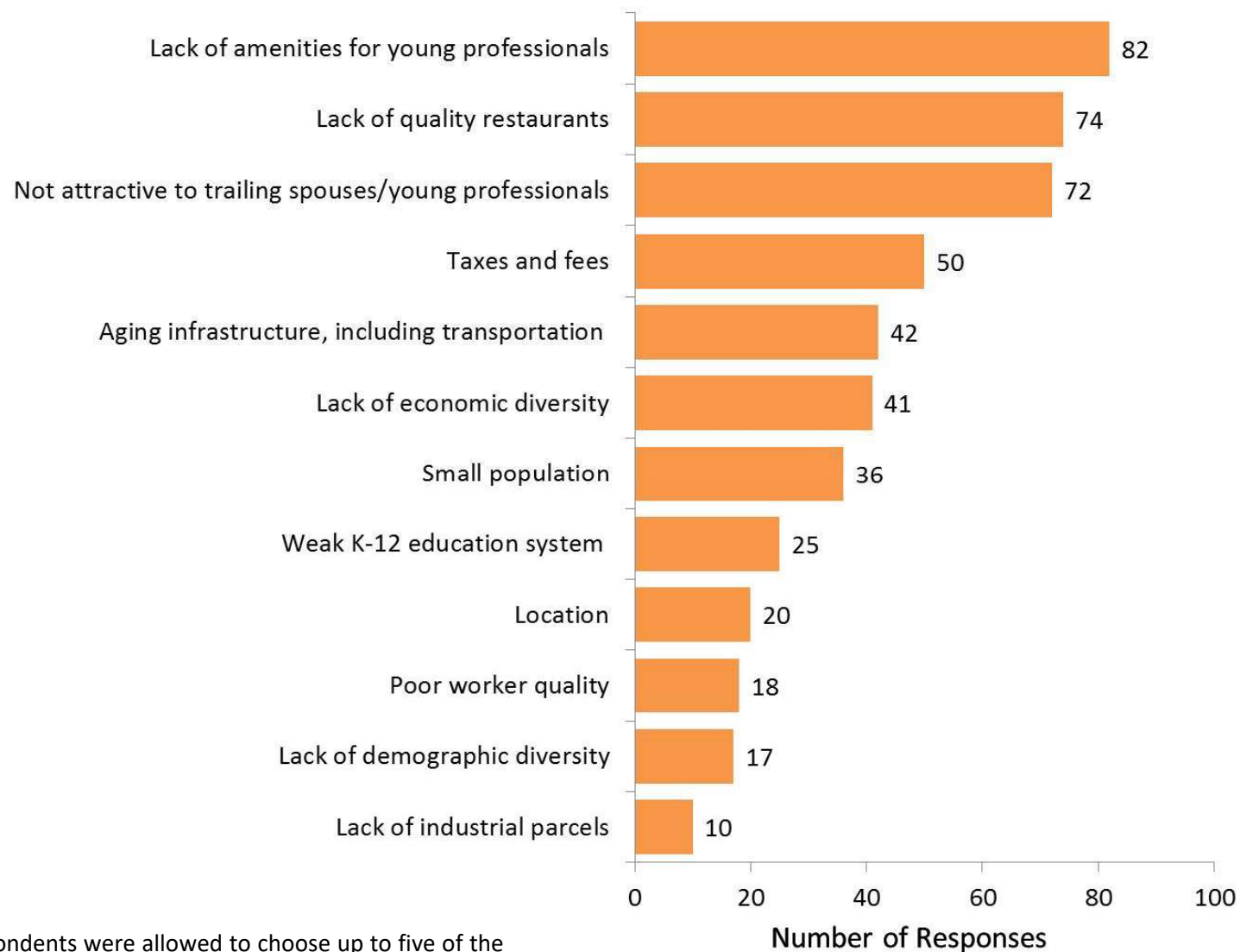


*Respondents were allowed to choose up to five of the options.



FIGURE 1.3: PERCEIVED INHIBITORS

When asked to indicate issues that inhibit Harvey County from recruiting businesses, survey respondents responded as follows:*



*Respondents were allowed to choose up to five of the options.



FIGURE 1.4: TARGET BUSINESS SECTORS

When asked what types of business sectors would be a good fit for the area, survey respondents responded as follows:*

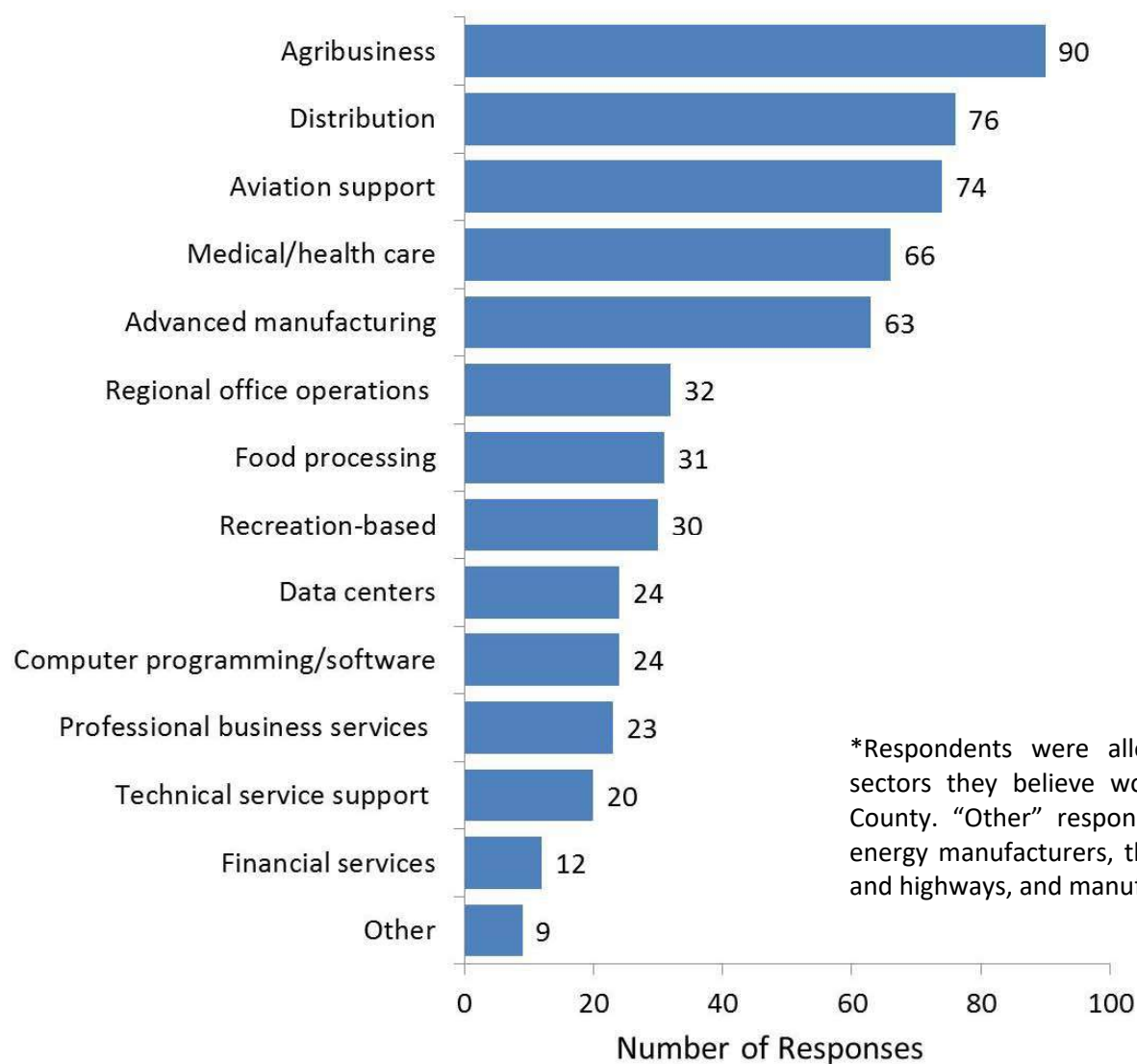
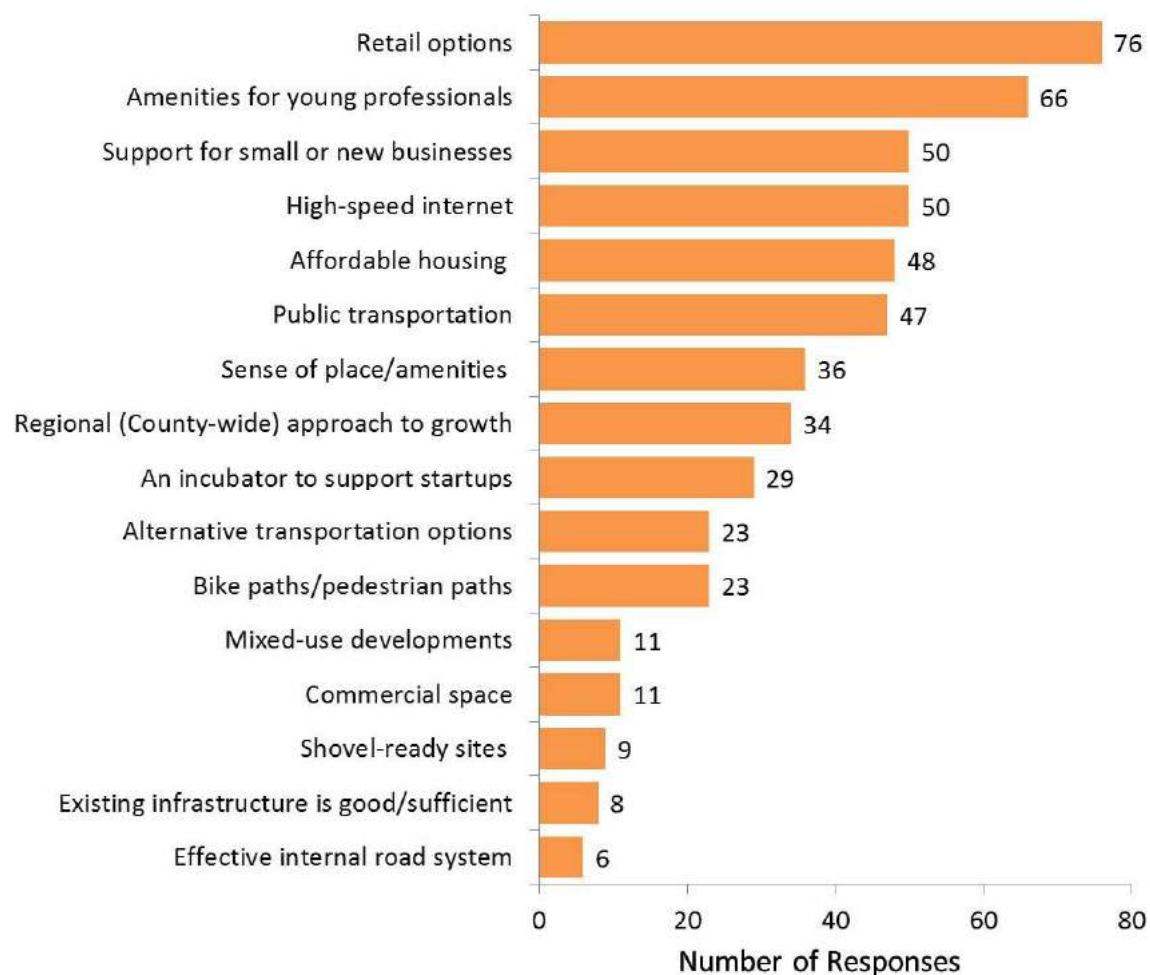




FIGURE 1.5: LACKING INFRASTRUCTURE

When asked what hard or soft infrastructure is weak or missing in Harvey County, survey respondents responded as follows:*

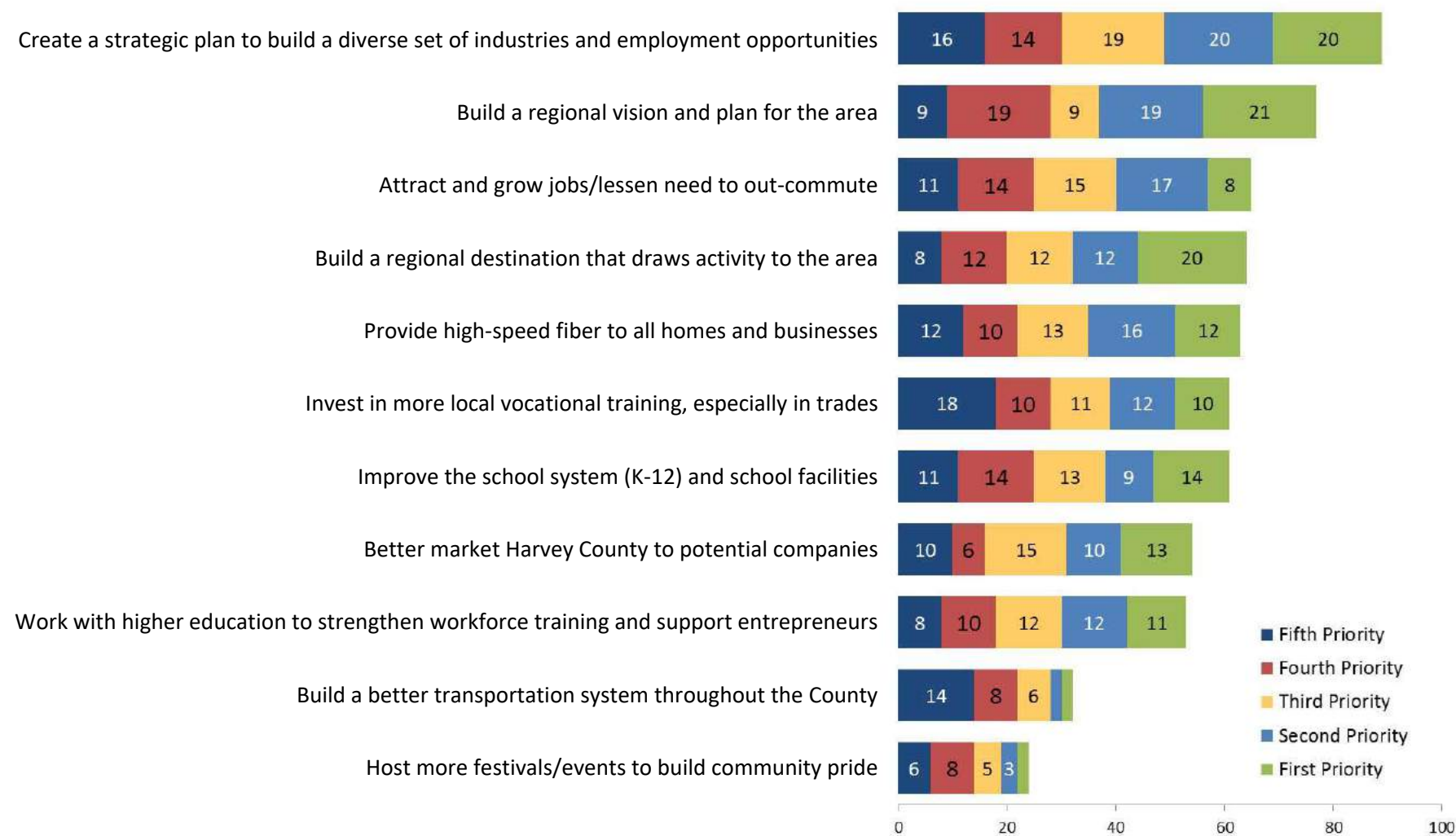


*Respondents were allowed to choose up to five responses. “Hard” infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports and/or ports; “soft” infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.



FIGURE 1.6: PRIORITIES TO STRENGTHEN HARVEY COUNTY'S COMPETITIVE POSITION AS A PLACE FOR BUSINESSES AND TALENT

When asked to indicate the top items they would like to see the County leadership take on to strengthen its ability to attract and retain quality companies and talent to Harvey County in the next 5–10 years—without worrying about money or politics—survey respondents responded as follows:



CHAPTER 2: ASSETS AND CHALLENGES ASSESSMENT



Harvey County offers a unique mix of assets for businesses that are contemplating relocation or expansion. In conducting the **Assets and Challenges Assessment (A&C)**, we employed the same criteria and methodology we use when conducting a community evaluation for our corporate clients to explore and identify locations for investment. By understanding its assets and challenges from a location strategy perspective, we believe that the County will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding the area's strengths and opportunities, the HCEDC will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets.

Garner Economics analyzed 50 community factors as part of the assessment. Ratings were identified by evaluating the County's position for each of the factors against the State of Kansas and the United States.

We define a "neutral" rating as normal in the realm of economic development opportunity and competitiveness. An "asset" rating indicates a positive feature of the County that would be evaluated and rated as a competitive strength versus the benchmark locations. A "challenge" rating identifies a factor that is considered a relative deficiency compared to other locations, which should be addressed with future remediation and may be an impediment to economic development if not resolved over time.

Of the 50 variables analyzed, 22 are considered an asset and 15 a challenge (13 rated as neutral). With 15 variables rated as a challenge, any or all of these rankings, taken either individually or as a whole, could be an impediment to attract or retain private investment within the County. The objective in the future will be for those policymakers engaged in local economic development to move the bar from a challenge to neutral or asset ranking, and to sustain or prevent a slippage of the current neutral and asset rankings that you have today.

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data to gain a more complete understanding in those areas of interest in the full report.

REPORT DASHBOARD



Indicates the County is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.












Indicates the County is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.



Indicates the County is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

Access to Markets

Of the nine variables evaluated, four are considered an asset with two as a challenge. Interstate 135; rail service with two main line carriers, a short line railroad, and Amtrak passenger service; close access to the Dwight D. Eisenhower National Airport (ICT); and the Newton City/County Airport, are all considered an asset. Challenges include its proximity and resources to serve international markets and no inland port facilities.

ACCESS TO MARKETS	RATING
Centrally located for major regional market	 1
Centrally located for national market	
Well positioned to serve international markets	
Interstate highways	 2
Rail service	 3
Port facilities (inland and/or water)	
Within 1 hour of commercial air passenger service	 4
General aviation airport capable of handling corporate aircraft	 5
Broadband availability and speeds	 6







Labor

The availability of skilled production workers is a strong asset for Harvey County. With a Location Quotient (LQ) of 2.27 and over 2,200 production occupations, the *Manufacturing* sector is a strong sector for Harvey County. Health care workers are another strong suit for Harvey County, with an LQ of 1.48 and employing over 3,000 people. The cost of labor is below the benchmarks of the United States and the State of Kansas. Availability of on-the-job training assistance is provided by several academic institutions: Bethel and Hesston Colleges located in the County; nearby Wichita State University, including its College of Engineering program; and a branch of Hutchinson Community College. And finally, the level of unionization is below the Kansas and U.S. averages. There are no challenges noted in the Labor category.

LABOR	RATING
Availability of skilled production workers	 7
Availability of office and admin support workers	 8
Availability of health care workers	 9
Availability of managerial personnel	 10
Cost of labor	 11
Quality of labor-management relations	 12
Availability of post-secondary vocational training	 13
Availability of on-the-job training assistance	 14
Within 1/2 hour of university(ies)/college(s)	 15
Availability of local engineering program/degree (nearby)	 16





Access to Resources

The availability of agricultural products for food processing is an asset in Harvey County. The County ranks high in the value of certain vegetables, poultry, eggs, and cotton. As noted previously, Harvey County has a strong manufacturing base, with an LQ of 3.01 and more than 4,000 employed in manufacturing. The availability and water and wastewater, along with the cost, is also a positive, depending on the local provider. There are six local water systems with various capacities and rates.

ACCESS TO RESOURCES	RATING
Availability of agricultural products for food processing	 17
Availability of manufacturing processes	 18
Availability of business and professional services	
Cost of electricity for industrial use	 19
Cost of natural gas	 20
Availability of water/cost of water/sewer	 21

Access to Space

Access to quality space related to the targeted industry sectors is an Achilles heel for Harvey County. The HCEDC currently (as of 4/20/2017) has listings on three buildings totaling 52,000 square feet. This is a significant challenge. The availability of quality office sites and office space is also a challenge. The one asset is the availability of fully served industrial sites. The HCEDC currently markets six municipally owned industrial parks throughout the County.



ACCESS TO SPACE	RATING
Availability of fully served and marketable industrial sites, reasonably priced	 22
Availability of fully served and attractive office sites	
Availability of suitable industrial space	 23
Availability of suitable office space	







Access to Capital

The availability of low-interest loans exists for small businesses utilizing programs offered by the South Central Kansas Economic Development District. There are no programs offering venture capital or funding for business startups/early stage funding. There is also no incubator or accelerator to help entrepreneurs in the startup phase.

Government Impact on Business


Survey respondents consider business permitting procedures and costs for Harvey County and some of the municipalities to be difficult (see more detail in Chapter 1). The condition and maintenance of local streets are considered an asset, as is the availability of government-sponsored local training incentives, offered by the State of Kansas.

ACCESS TO CAPITAL FOR START-UPS AND SMALL BUSINESS	RATING
Availability of low-interest loans for small business	 ²⁴
Availability of venture capital from local sources for business startups or early stage funding	
Availability of a local small business incubator or accelerator	

GOVERNMENT IMPACT ON BUSINESS	RATING
Condition and maintenance of local streets	
Availability and type of local incentives	 ²⁵
Availability of labor training incentives	 ²⁶
County ACT test scores	 ²⁷
Business permitting procedures and costs	 ²⁸
Local property taxes (median in Kansas)	 ²⁹

Quality of Place

Of the 12 variables analyzed, 4 are considered an asset, 4 are neutral and 4 are a challenge. The cost of living, low crime, and quality medical facilities are all considered assets. Being susceptible to natural disaster risk, limited retail shopping and dining options, limited accommodations, and the availability of apartments are all considered challenges.

QUALITY OF PLACE	RATING
Availability of executive-level housing	 30
Availability of moderate-cost housing	 31
Availability of apartments	 32
Cost-of-living index	 33
Level of crime	 34
Climate and natural disaster risk	 35
Attractiveness of the physical environment	 36
General appearance of the community(ies)	 37
Availability of major shopping facilities	 38
Availability of adequate medical facilities	 39
Availability of AAA four-diamond or above first-class hotels, motels, and resorts	 40
Appearance of the Central Business District(s)	 41

The following endnotes support the rankings offered in the **Assets and Challenges Assessment**.

Access to Markets

¹ 500 Mile Radius Results:

Geography Name	Year	Total Population
Radius Region	2016	45,087,696

Source: U.S. Census Bureau

The U.S. population is 325,000,000. Harvey County is a one day's drive to 45 million people.

² Interstate 135 is a 95.7-mile-long Interstate Highway in central and south-central Kansas. I-135 runs between the cities of Salina and Wichita and through Newton (Harvey County).

³ Two main line carriers (BNSF and Union Pacific) and one short line railroad, Watco. Watco Transportation Services (WTS) is the largest privately owned short line operator in the United States. AMTRAK passenger service.

⁴ Dwight D. Eisenhower National Airport (ICT) in Wichita, served by six airlines.

⁵ Newton City County Airport. The FAA's National Plan of Integrated Airport Systems for 2011–2015 categorized it as a reliever airport for Wichita Mid-Continent Airport. The airport covers 635 acres at an elevation of 1,533 feet. It has two asphalt runways: runway 17/35 is 7,003 by 100 feet and 8/26 is 3,501 by 60 feet.

⁶ Access to *DSL* (88.7 percent of households) and *Cable* (85.5 percent of households) is behind the nation but stronger than the state. Download and upload speed tests for small business speeds were slower than the state and nation.

Labor

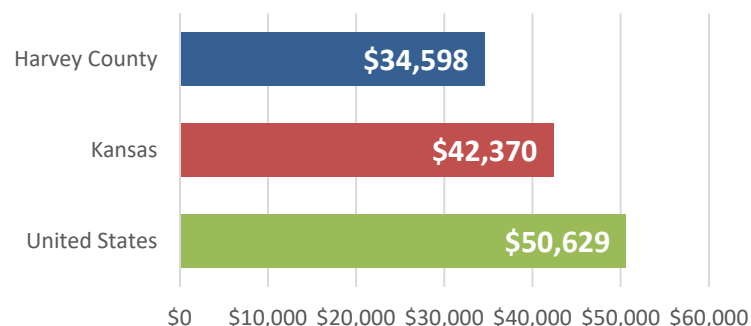
⁷ With a Location Quotient (LQ) of 2.27 and 2,216 employees, production occupations are a string sector in Harvey County.

⁸ An LQ of 0.97 and 2,407 workers.

⁹ An LQ of 1.48 employing 3,035 workers.

¹⁰ An LQ of 0.91 and 814 workers.

¹¹ 2016 Estimated Average Annual Wage



Source: EMSI 2016, Garner Economics

¹² Unionization, Highest Relative Number **Shaded, 2016**

	Public	Private	Total
Wichita MSA	28.9%	4.7%	7.6%
Kansas	22.8%	5.9%	8.6%
United States	34.4%	6.4%	10.7%

Data only reported at the MSA level

Source: © 2015 by Barry T. Hirsch and David A. Macpherson, Garner Economics

¹³ Hutchinson Community College and Brook Trade Center; Hesston College (two-year and certificate programs)
http://www.htecnetwork.org/member_info.cfm?member=1154;
<http://www.hesston.edu/academics/majors/>

¹⁴ Kansas Local Area 1 Workforce Investment Board and Harvey County Economic Development Council
<http://www.harveycoedc.org/workforce.php>

¹⁵ Bethel College and Hesston College in Harvey County. Wichita State University in Sedgwick County

¹⁶ Wichita State University, College of Engineering (25 miles from Newton)

Access to Resources

¹⁷ According to the USDA Ag Census, Harvey County ranks high in the value of production for cotton, certain vegetables, poultry, and eggs.
https://www.agcensus.usda.gov/Publications/2012/Online_Resources/County_Profiles/Kansas/cp20079.pdf

¹⁸ LQ of 3.01. 4,000 people working for local mfg. companies.

¹⁹ Electricity and gas costs for industrial use

	Harvey County	Kansas	U.S.
Cost of electricity for industrial use (in cents)	Westar Energy: 7.84	7.61	6.91
Cost of natural gas	7.23	\$4.24	\$3.91

2015 Average Industrial Electric Cost (cents/kilowatt hour)

2015 Average Industrial Natural Gas (cost/1000 cubic feet)

Source: U.S. Energy Information Administration (eia)

²⁰ Average of all utilities that reported in Harvey County, with an industrial sales price per 1,000 cu. ft. for the United States and for Kansas.

- Harvey County (for the three providers): 7.23
- Kansas: 6.67
- United States: 7.14

²¹ Six local water systems with various capacities demand and rates.

Access to Space

²² The HCEDC currently markets six municipally owned industrial parks throughout the County, each with their own unique attributes. Each show well as a location for a mfg. or distribution type of facility. Approximate 500 acres in aggregate. Prices range from \$5,000 to \$11,000 per acre.

²³ The HCEDC currently has listings for three buildings totaling 52,000 sq. ft.

Access to Capital

²⁴ South Central Kansas Economic Development District
<http://www.harveycoedc.org/incentives.php>

Government Impact on Business

²⁵ <http://www.harveycoedc.org/incentives.php>

²⁶ <http://www.harveycoedc.org/incentives.php>

²⁷ 2016 Average ACT Scores (Highest Score Shaded)

	Harvey County	Kansas	United States
2016	21.5	21.8	20.8

Source: U.S. Department of Education



²⁸ Based on feedback from the business climate survey respondents, and the County 40-acre planning and zoning rule.
<http://www.harveycounty.com/departments/planning-a-zoning/zoning-information.html>

²⁹ <http://www.tax-rates.org/kansas/property-tax> (\$1,418 for Harvey County)

Quality of Place

³⁰ 22 active listings of homes valued in excess of \$250,000, according to Zillow.com, April 2017

³¹ 96 active listings of homes valued from \$75,000 to \$249,000 according to Zillow.com, April 2017

³² 13 active rental listings on Apartment.com as of April 2017

³³ Cost of living index is 87, lower than the national average of 100. All categories measured for cost of living also rank under 100 with the exception of Utilities, which is 115. (Areavibes.com, 2017)

³⁴ Harvey County has the lowest property crime rate and violent crime rate compared to the state and nation (FBI crime stats).

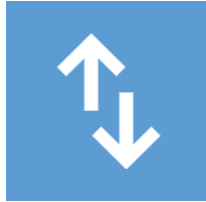
³⁵ High risk of tornadoes. Active record of 49 through 2015.
<http://www.tornadohistoryproject.com/tornado/Kansas/Harvey>

³⁶ <http://www.tornadohistoryproject.com/tornado/Kansas/Harvey>

³⁷ Newton Medical Center <https://www.newtonmed.com/about-nmc/awards-recognition/>



CHAPTER 3: DASHBOARD INDICATORS SUMMARY



The following analysis examines the economic position and competitiveness of Harvey County, Kansas, a county within the Wichita Metropolitan Statistical Area (MSA). This report shows demographic and economic trends in Harvey County and examines the economy of the area. Additionally, Harvey County is compared to the State of Kansas and the nation for benchmarking.

Where possible, county-level data was included in the report; however, for several subjects, MSA-level was the smallest level of measure

available and used as an indicator. In particular, New Firm Startups and Unionization are presented with the Wichita MSA for indicators and Cost of Living utilizes the City of Newton measures.

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. In all cases, the original and most current available data (as of February 2017) for all benchmarks universally are used. Garner Economics conducted all unique calculations and computations from the original data and detailed methodology is available upon request.

Benchmarks:

- Harvey County
- Kansas
- United States

Measurements:

- | | | |
|--------------------------------|-------------------------------------|-------------------------------------|
| • Population Trends | • Crime Rate | • Broadband (average speed, access) |
| • Age Distribution | • Cost of Living | • Retail Demand & Leakage |
| • Race and Hispanic Origin | • Labor Force Draw | • Major Industry Sector Change |
| • New Residents | • Labor Force Participation | • Industry Earnings |
| • Educational Attainment | • Commuting Patterns | • Occupational Change |
| • Secondary School Performance | • Major Industry Sector Composition | • Occupational Earnings |
| • Household Income | • Estimated Average Annual Wage | • Industry & Occupational Local |
| • Individual Earnings | • New Firms Startups | Specialization, Competitiveness & |
| • Per Capita Income | • Self-Employment | Growth |
| • Poverty | • Unionization | |



DEMOGRAPHIC & COMMUNITY TRENDS		
Population Growth		Harvey County had a net gain of population from 2006–2015; however, growth is at an average pace of .4 percent annually over the last decade but experienced population loss for several years.
Age Distribution		Two age groups are growing in Harvey County: ages 20–24 and 55–74.
		Harvey County has an older median age (38.4) than the state (34.9) and the nation (37.8).
		Harvey County is following national trends of an aging population; however it falls behind Kansas and the United States for the percent of population ages 25–54, which is the core workforce-aged population.
New Residents		Harvey County's new residents comprise 7 percent of the total population with median ages in the twenties among those who move from within Kansas (4.2 percent), out-of-state (2.3 percent), or from abroad (.5 percent).
Educational Attainment		In general, the educational attainment level in Harvey County is below the state and the nation for population ages 25+; however, collectively 34.1 percent of residents have earned a post-secondary degree, which includes <i>Associate</i> (7.6 percent), <i>Bachelor's</i> (17.3 percent), and <i>Graduate-Level</i> (9.2 percent).
Secondary School Performance		Harvey County's average composite ACT score is, and has been consistently, above the national average with a 2016 score of 21.5 compared to the U.S. average of 20.8. Scores have been falling since 2014, declining lower than the Kansas average.
		The average four-year graduation rate in Harvey County is 86.1, dropping more than 5 points from a score of 91.8 in 2015. Graduation rates are high in general and stay consistently above the state and national rate.
Household Income		Harvey County's <i>Median Household Income</i> of \$51,327 is below the national (\$53,889) and state (\$53,205) median for 2015 but not significantly. The distribution of household income is favorable, with Harvey County having a higher proportion of middle incomes from \$35,000–\$149,000.
Individual		Reflecting the income of individual County residents ages 16 and over who work full-time, the average income is \$48,178 lagging behind the state (\$54,341) and the nation (\$59,736). Again, the distribution of individual income shows a mid-range peak of incomes from \$35,000–\$64,000.
Per Capita Income		Per capita income in Harvey County is \$24,453, significantly lower than the state (\$27,706) and the nation (\$28,930).
Poverty		Harvey County has fewer people living in poverty than the nation, with only 13.2 percent below the poverty level. However, <i>Children Under 18 below the Poverty Level</i> is 20.2 percent, behind the nation but ahead of the state.






DEMOGRAPHIC & COMMUNITY TRENDS, CONTINUED

Crime		Harvey County has the lowest property crime rate and violent crime rate compared to the state and nation.
Cost of Living		Cost-of-living index is 87, lower than the national average of 100. All categories measured for cost of living also rank under 100 with the exception of <i>Utilities</i> , which is 115.

LABOR MARKET ANALYSIS & EMPLOYMENT TRENDS

Labor Force Participation		Among residents ages 16 and over in Harvey County, 63.6 percent are in the labor force, on par with the national participation rate of 63.7 percent. Both these rates are below the statewide labor participation rate for Kansas at 67 percent. Although Harvey County is following a national trend of declining labor force participation, the County has experienced a change of 3.3 percent since 2010, the biggest decrease for all geographies studied.
Labor Draw		Within a 50-mile radius, the labor force is estimated to be 378,769, which will provide additional opportunity to bolster the County's labor force of 17,417 (2016).
Commuting Patterns		Harvey County has an evenly distributed number of residents to work within the County (49 percent) and those who leave the County for work (51 percent). Overall, 7,200 people live and work in the County, 7,507 out-commute, and 5,883 in-commute. Wichita and Sedgwick County see the most inflow and outflow compared to all other locations.
		Harvey County's average <i>Travel Time to Work</i> is 17.8 minutes, well behind the national average of 25.9 minutes.
Major Industry Composition		The County's employment base is strong in manufacturing with 24 percent of the composition. Additional sectors with high percentages are <i>Health Care and Social Assistance</i> as well as <i>Government</i> . Additional sectors are 10 percent or less.
Average Wage		The average wage of Harvey County's workers—regardless of where they live—is \$34,598. This is in contrast to the individual earnings of residents (\$48,178). Wages have grown more over the last decade than the nation and the state; however, when adjusted for inflation, the growth does not keep up with state and national levels.
Startup Firms		Startup creation is declining in the Wichita MSA, both in total number of new firms as well as the startup rate per 100,000 residents. The startup rate is consistently lower than the state and nation.

LABOR MARKET ANALYSIS & EMPLOYMENT TRENDS, CONTINUED		
Self-Employment		Self-employment in Harvey County is 8.9 percent, a drop from 11.1 percent five years ago. The rate fell more dramatically in <i>Not Incorporated & Unpaid Family Workers</i> from 8.6 percent to 5.3 percent. However, those who incorporated rose from 2.5 percent to 3.6 percent over the same five-year period.
Unionization		Unionization is low for the Wichita MSA with only 4.7 percent of workers belonging to a union. Wichita’s unionization rates are lower than the state and nation across the board for of private and total workforce.
Broadband		Access to <i>DSL</i> (88.7 percent of households) and <i>Cable</i> (85.5 percent of households) is behind the nation but stronger than the state. Download and upload speed tests for <i>Small Business</i> speeds were slower than the state and nation. Data was lacking for measuring medium to larger businesses and residential speeds were faster than others, but may not be a true indicator of internet speed for business.



LOCAL SPECIALIZATION, COMPETITIVENESS & GROWTH

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Harvey County. This information is not benchmarked.

<p>Major Industry Sector Change</p>	<ul style="list-style-type: none"> ✓ Over the last five years, the largest absolute industry job gains in Harvey County came from <i>Manufacturing</i>, up 756 jobs or 24 percent and <i>Health Care & Social Assistance</i>, which added 228 jobs or 8 percent. ✓ Other gains were made in <i>Administrative, Support, Waste Management & Remediation Services</i> (95 jobs/34 percent); <i>Crop & Animal Production</i> (81 jobs/51 percent); <i>Transportation & Warehousing</i> (54 jobs/20; and <i>Retail Trade</i> (52 jobs/3 percent). ✓ There were no significant job losses—no sector declined more than 30 jobs. For several sectors, the job loss was about 20 percent of the industry employment. ✓ The three sectors which experienced loss of 20 percent include <i>Information</i> (-11 jobs/20 percent); <i>Arts, Entertainment, and Recreation</i> (-22 jobs/20 percent); and <i>Real Estate, Rental & Leasing</i> (-29 jobs/20 percent).
<p>Industry Earnings</p>	<ul style="list-style-type: none"> ✓ A comparison of Harvey County industry earnings to state and national averages may offer insights into areas of unique expertise or cost-saving opportunities. The <i>Utilities</i> and <i>Transportation & Warehousing</i> industry sectors had average wages above the nation and state and topped the list for highest industry averages for Harvey County. ✓ Five industry sectors in Harvey County have wages under half the rate of national averages: <ul style="list-style-type: none"> ▪ <i>Management of Companies & Enterprises</i> (55 percent lower); ▪ <i>Finance & Insurance</i> (56 percent lower); ▪ <i>Information</i> (61 percent lower) ▪ <i>Real Estate, Rental & Leasing</i> (50 percent lower); and ▪ <i>Educational Services</i> (53 percent lower). ✓ The <i>All Industry</i> average salary for Harvey County is 32 percent under the national average wage and 18 percent under the state average wage.
<p>Major Occupational Change</p>	<ul style="list-style-type: none"> ✓ Over the last five years, the top occupations with absolute job gains in Harvey County were in <i>Healthcare Support</i>, up 194 jobs or 33.4 percent; and <i>Production</i>, up 169 jobs or 8.3 percent ✓ The greatest job losses were in the occupational areas of <i>Sales</i> (-87 jobs/6 percent) and <i>Community & Social Service</i> (-62 jobs/14 percent).



LOCAL SPECIALIZATION, COMPETITIVENESS & GROWTH, CONTINUED

Occupational Earnings	<ul style="list-style-type: none"> ✓ A comparison of the same-occupation median hourly earnings for Harvey County to the national median wage revealed only one occupation that was higher than the national median: <i>Production</i>, which was 2.5 percent higher (Table 7.4, Figure 7.4). ✓ The median wage for all occupations in Harvey County was \$17.03 compared to \$19.00 for the Kansas median wage and \$21.30 for the national median. The County's median wage is 11.6 percent lower than Kansas and 25 percent lower than the United States.
Major Industry Sector Specialization & Growth	<ul style="list-style-type: none"> ✓ There are four industry sectors with a level of local specialization above 1.0 that grew within the last five years, comprising sectors in the <i>Competitive</i> category: <ul style="list-style-type: none"> ▪ Manufacturing ▪ Crop & Animal Production ▪ Educational Services ▪ Health Care & Social Assistance ✓ There are eight <i>Emerging</i> industry sectors in Harvey County with a level of local specialization below 1.0; however, due to job growth these industry sectors are classified as <i>Emerging</i>. ✓ The <i>Construction</i> sector has a local specialization over 1; however, due to recent job losses is categorized <i>At-Risk</i>. ✓ There are six industries <i>Declining</i> due to low local specialization and job loss. (Table 7.5, Figure 7.5). ✓ The <i>Utilities</i> sector had data that was not disclosed and along with a low local specialization and small employment, was not included in this chapter.
Major Industry Competitiveness	<ul style="list-style-type: none"> ✓ By this measure, <i>Administrative, Support, Waste Management & Remediation Services</i> and <i>Transportation & Warehousing</i> are the strongest with both local and national growth. ✓ Other industries with local competitive effect are <i>Manufacturing; Crop and Animal Production; Other Services; and Mining, Quarrying, Oil & Gas Extraction</i> (Table 7.6, Figure 7.6). ✓ Overall, Harvey County demonstrated a positive local competitive effect in 6 of the 18 major industry groups. ✓ The County's least competitive sectors are <i>Information, Wholesale Trade, Finance and Insurance, Retail Trade, and Government</i>.
Occupational Specialization & Growth	<p>Six occupational groups are <i>Competitive</i>:</p> <ul style="list-style-type: none"> ▪ Production ▪ Healthcare Support ▪ Community & Social Service ▪ Construction & Extraction ▪ Installation, Maintenance & Repair ▪ Healthcare Practitioners & Technical <ul style="list-style-type: none"> ✓ Production occupations increased more than 330 workers (Table 7.7, Figure 7.7) and is the biggest employment section in Harvey County. ✓ The majority of occupational groups (12) are classified as <i>Emerging</i>—having job growth with local specialization under 1. ✓ Two occupational groups are <i>At-Risk</i> with location quotients over 1 but have experienced job loss in the last 5 years: <i>Education, Training & Library</i> (-104 jobs)/1.16 LQ) and <i>Personal Care & Services</i> (-51 jobs)/1.05 LQ). Additionally, 3 occupation groups are <i>Declining</i> with job loss and low local specialization: <i>Food Preparation & Serving</i> (-8 jobs); <i>Arts, Design, Entertainment, Sports & Media</i> (-2 jobs); and <i>Military</i> (-11 jobs).

CHAPTER 4: DEMOGRAPHIC & COMMUNITY TRENDS



This chapter focuses on the residents of Harvey County, Kansas, exploring population demographics, migration trends, and sources of change in these communities offering a view of new residents. Analysis of income for households, individuals, per capita income, and poverty rates are indicators of residents' economic standing. Included in this chapter are several indicators affecting residents' quality of life and opportunity, such as crime rates and cost of living.

Population Trends

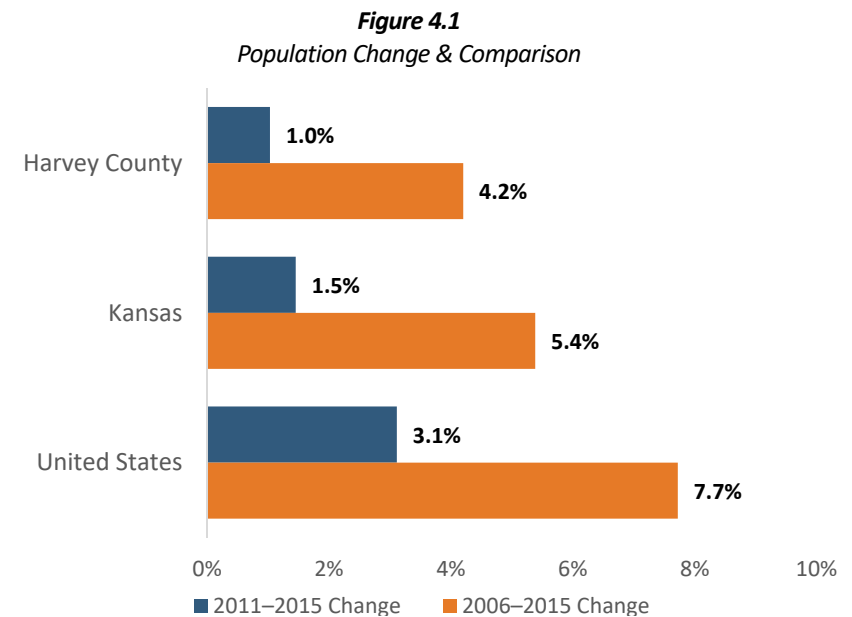
The rate of population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Most firms are wary of areas with population declines, very slow growth rates, or significant amounts of domestic out-migration.

Harvey County, Kansas, has grown by 1,414 over the past decade and 358 over the last five years. In comparison, with a growth rate for the decade at 4.2 percent, the County is growing at a slower rate than Kansas and the nation. (Table 4.1, Figure 4.1).

Since 2006, Harvey County achieved a net gain of population, yet experienced a negative rate for two of those years. The average annual growth rate in the past decade has been a modest 0.4 percent with the last five years showing a slower pace of 0.2 percent (Table 4.2, Figure 4.2). This rate is below the state and nation (Figure 4.3).

Chapter Data

- Population Trends
- Age Distribution
- Race and Hispanic Origin
- New Residents
- Educational Attainment
- Secondary School Performance
- Household Income
- Individual Earnings
- Per Capita Income
- Poverty
- Crime Rate
- Cost of Living



Source: U.S. Census Bureau Population Estimates, Garner Economics

Table 4.1
Net Population Change
Highest Relative Figure Shaded

	2015 Population	2011–2015 Change		2006–2015 Change	
		#	%	#	%
Harvey County	35,073	358	1.0	1,414	4.2
Kansas	2,911,641	41,724	1.5	148,710	5.4
United States	321,418,820	9,699,963	3.1	23,038,908	7.7

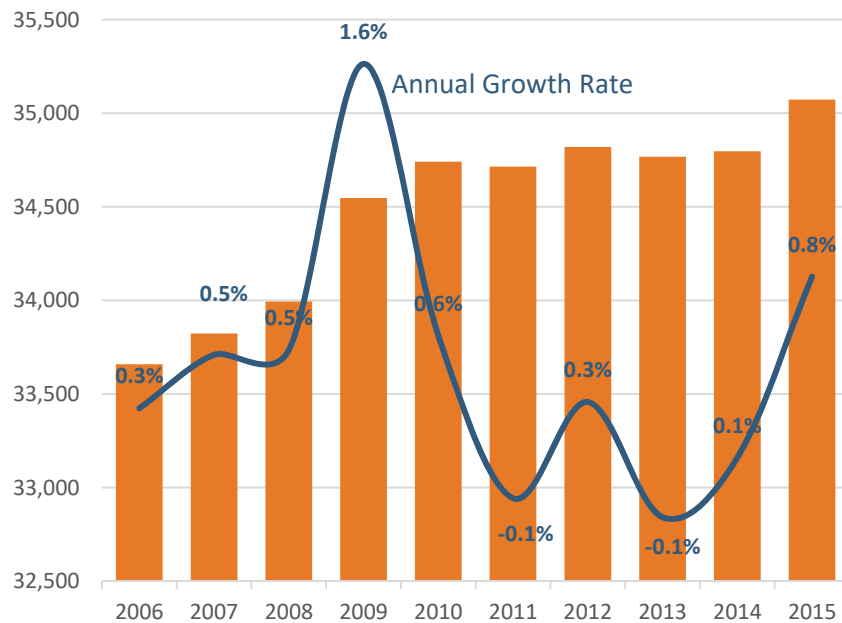
Source: U.S. Census Bureau Population Estimates, Garner Economics

Table 4.2
Average Annual Growth Rate
Highest Relative Figure Shaded

	2011–2015 Change	2006–2015 Change
Harvey County	0.2%	0.4%
Kansas	0.4%	0.6%
United States	0.8%	0.8%

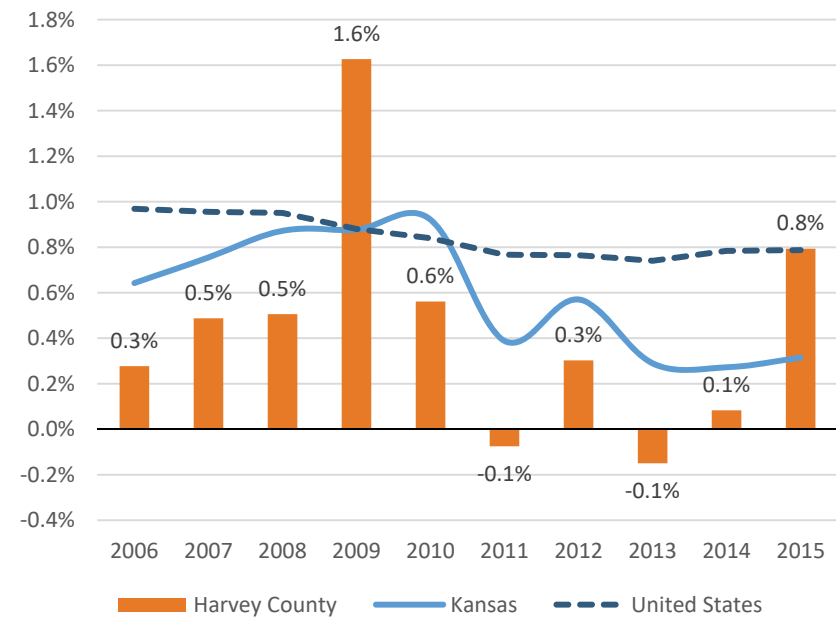
Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.2
2006–2015 Harvey County Population Growth & Annual Change



Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.3
2006–2015 Annual Population Change

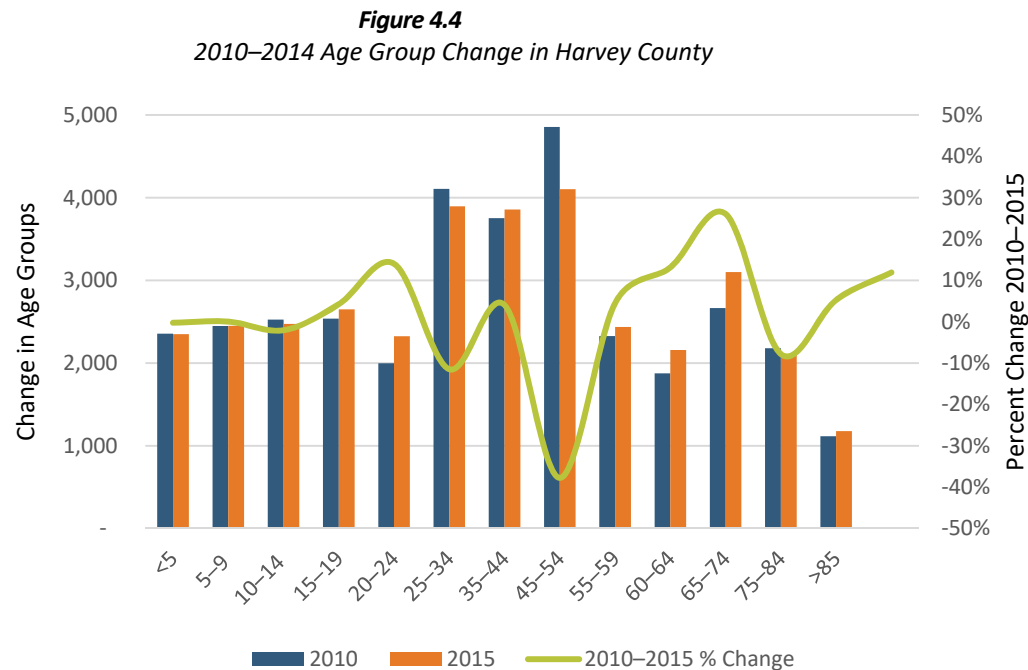


Source: U.S. Census Bureau Population Estimates, Garner Economics

Age Distribution

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers.

Harvey County is showing a trend of growth from 2010 to 2015 in two age groupings: the 20–24-year-olds and older ages groups, particularly ages 55 to 74 (Figure 4.4).



Source: U.S. Census Bureau Population Estimates, Garner Economics

Median age for Harvey County is the oldest compared to Kansas, which has the youngest, and the national median age. (Table 4.3).

Population age groups from 2010 and 2015 for Harvey County were compared with a percent change trend overlaid in Figure 4.4. Compared to other benchmark geographies, Harvey County is following national trends of an aging population, however falls behind Kansas and the United States for the percent of population ages 25–54 which is the core workforce aged population (Table 4.4, Figure 4.5).

Table 4.3
2015 Median Age
Oldest Median Age Underlined; Youngest Median Age **Green**

<u>38.4</u>
Harvey County
34.9
Kansas
37.8
United States

Source: U.S. Census Bureau Population Estimates, Garner Economics

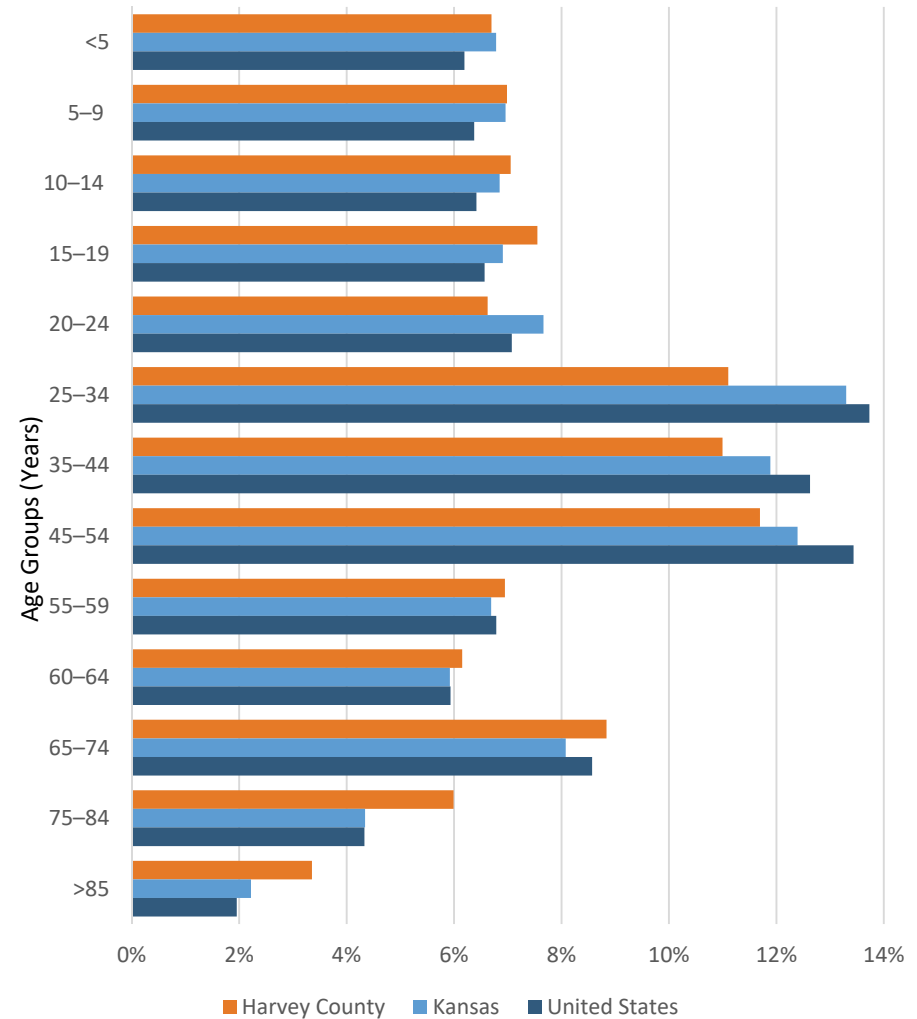


Table 4.3
2015 Population by Age Groups
Highest Relative Figure Shaded

	Harvey County		Kansas	United States
	#	%		
<5	2,349	6.7%	6.8%	6.2%
5–9	2,450	7.0%	7.0%	6.4%
10–14	2,474	7.1%	6.8%	6.4%
15–19	2,649	7.6%	6.9%	6.6%
20–24	2,324	6.6%	7.7%	7.1%
25–34	3,895	11.1%	13.3%	13.7%
35–44	3,857	11.0%	11.9%	12.6%
45–54	4,102	11.7%	12.4%	13.4%
55–59	2,437	6.9%	6.7%	6.8%
60–64	2,158	6.2%	5.9%	5.9%
65–74	3,100	8.8%	8.1%	8.6%
75–84	2,101	6.0%	4.3%	4.3%
>85	1,177	3.4%	2.2%	2.0%

Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.5
2015 Population by Age Groups



Source: U.S. Census Bureau Population Estimates, Garner Economics

Race & Hispanic Origin

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity in order to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States.

Harvey County has a less diverse racial distribution than the nation and the state based on the 2015 population estimates. The number of those who identify as American Indian and Alaska Native is the same rate as the nation and only slightly lower than Kansas. Those who classify themselves as having Hispanic origin, regardless of race, are 12.1 percent of the Harvey County population, which is slightly more than Kansas but less than the United States (Table 4.4).

Table 4.4
2015 Race & Hispanic Origin by Percentage of Total Population
(Highest Relative Figure Shaded)

	Harvey County	Kansas	United States
White	93.6%	86.6%	77.2%
Black or African American	3.0%	7.4%	14.0%
American Indian and Alaska Native	2.0%	2.3%	2.0%
Asian	1.3%	3.4%	6.4%
Native Hawaiian and Other Pacific Islander	0.1%	0.2%	0.5%
Hispanic Origin	12.1%	11.7%	17.7%

Source: U.S. Census Bureau American Community Survey, Garner Economics

New Residents

Attracting new residents from a diversity of outside locations can reflect a community's broader appeal and provide an indicator of economic dynamism.

Harvey County attracted approximately seven percent of its total population from outside of the County. More than 2,400 new residents were estimated to have moved to the County one year earlier (at the time of survey). More than 4 percent of the County's population moved from a different county within Kansas, 2.3 percent moved from a different state, and less than 1 percent came from locations abroad. (Table 4.5, Figure 4.6). Harvey County gained a higher percentage of its population growth from migration than the nation and was on par with state migration patterns.

Across the board, median ages of those who moved were fairly young—Harvey County had the youngest median age moving in from a different state. Kansas trended younger in those moving from a different county within the state and from abroad. Both Harvey County and Kansas were generally younger than national migration median ages (Table 4.5).

New residents for Harvey County had a higher percentage of individuals who were *High School Graduates or Less than High School* education levels and a lower median income (Table 4.5, Figure 4.7).

Table 4.5
New Residents

Previous Location of Residents Who Had Moved One Year Earlier
(Highest Relative Figure Shaded) (Youngest Relative Age in Green)

	Harvey County	Kansas	United States
Different County, Same State	4.2%	3.4%	3.2%
Different State	2.3%	3.1%	2.3%
Abroad	0.5%	0.6%	0.6%
Percent of Total Population Who are New Residents	7.0%	7.1%	6.1%
Median Age of New Residents			
Different County, Same State	26.4	24.7	27.1
Different State	21.2	26.3	27.9
Abroad	26.5	25.9	28.8
Educational Attainment of New Residents			
Less than High School Graduate	17.7%	11.3%	12.0%
High School Graduate	33.8%	24.4%	23.3%
Some College or Associate Degree	27.7%	30.7%	28.5%
Bachelor's Degree	12.3%	21.1%	22.1%
Graduate or Professional Degree	8.4%	12.5%	14.1%
Median Income of New Residents			
Different County, Same State	\$15,313	\$16,153	\$19,858
Different State	\$18,125	\$20,798	\$21,997
Abroad	\$11,152	\$18,853	\$18,510

Figure 4.6

Sources of New Residents
Previous Location of Residents Who Had Moved One Year Earlier

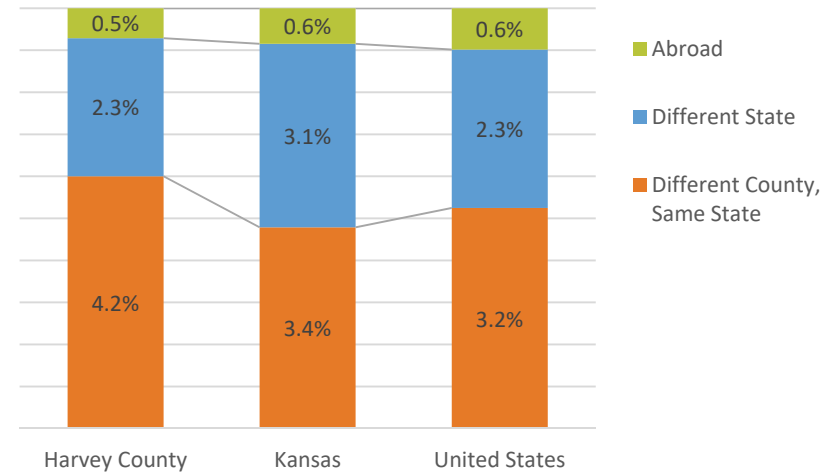
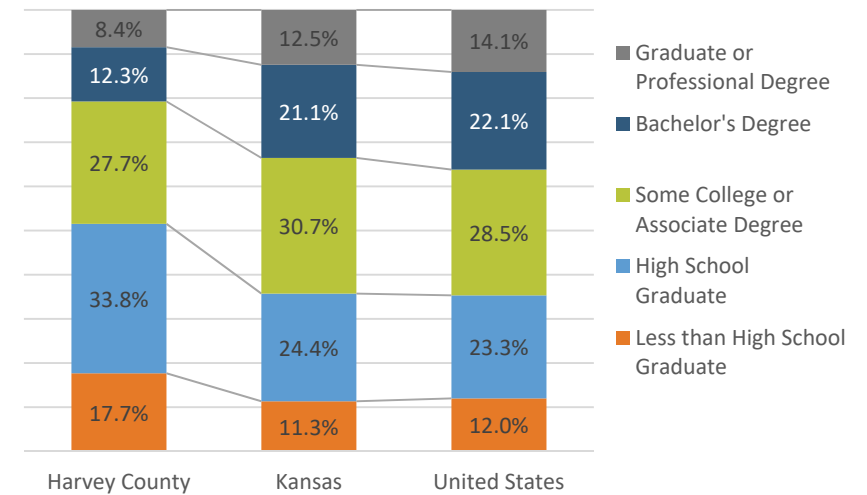


Figure 4.7

Educational Attainment of New Residents



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics (categories included: Different County, Same State; Different State; and Abroad)

Educational Attainment

Increasingly, the level of education of a community's population is becoming a decisive factor in economic competitiveness. Firms understand the need to operate in economies that offer a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

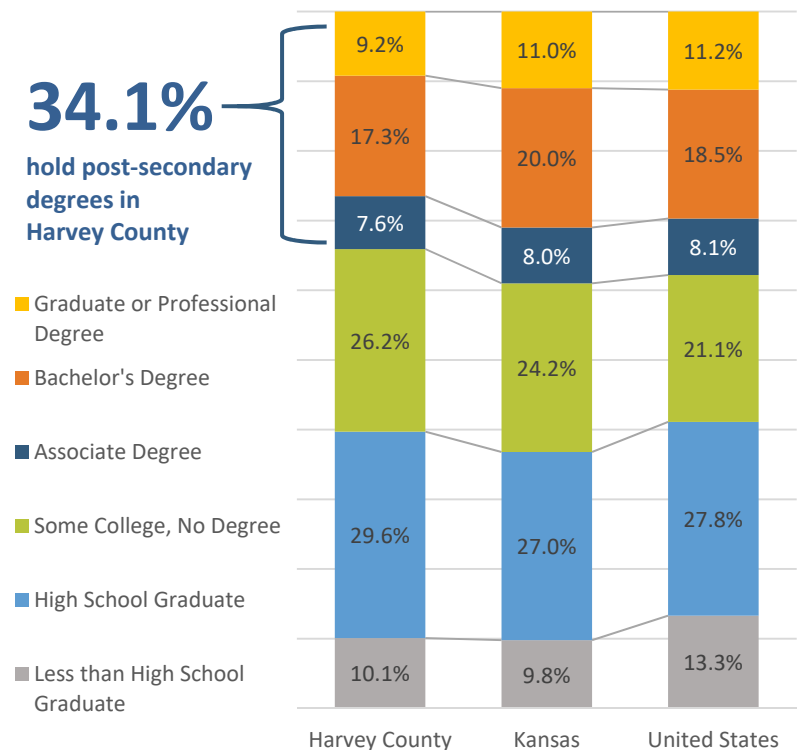
Harvey County has the highest percentage of *High School Graduates* and those with *Some College, No Degree* compared to the state and nation (Table 4.6, Figure 4.8). Less than 10 percent of Harvey County's population ages 25 or more did not finish high school, which is higher than Kansas but still lower than the United States. From *Associate* to *Graduate-Level*, 34 percent of Harvey County residents ages 25 or older hold post-secondary school degrees.

Table 4.6
Educational Attainment
Percentage Total Population Age 25+
(Highest Relative Figure Shaded)

	Harvey County	Kansas	United States
Less than High School Graduate	10.1%	9.8%	13.3%
High School Graduate	29.6%	27.0%	27.8%
Some College, No Degree	26.2%	24.2%	21.1%
Associate Degree	7.6%	8.0%	8.1%
Bachelor's Degree	17.3%	20.0%	18.5%
Graduate or Professional Degree	9.2%	11.0%	11.2%
Combined Post-Secondary Degree	34.1%	39.0%	37.8%

Source: U.S. Census Bureau American Community Survey 2011-2015, 5-Year Average; Garner Economics (For Table 4.6 and Figure 4.8)

Figure 4.8
Educational Attainment
Percentage Total Population Age 25+



Secondary School Performance

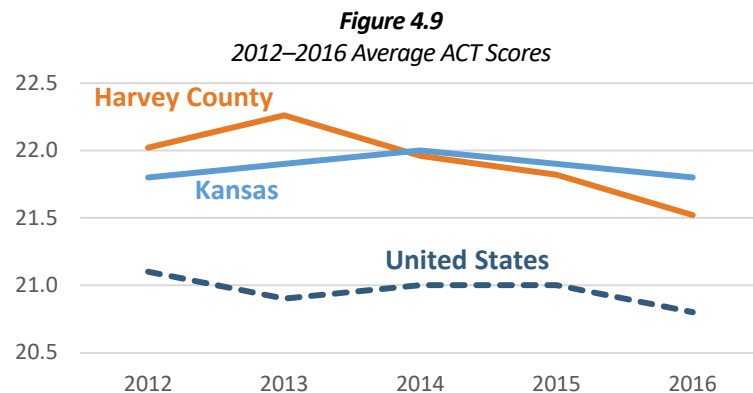
ACT Scores

The ACT exam is a standardized test for college admissions in the United States and is a widely accepted measure of education quality. These scores are especially relevant to businesses because they provide a measure of the “final product” of public schools and the educational quality. The trend is shifting from taking SAT tests to more students taking the rival ACT test. This measurement is for public schools only and does not cover private institutions.

Harvey County has multiple school districts with a range of scores. For this exercise, an average of these district composite scores are used to represent the countywide score. School districts included in the study are Burrton, Halstead, Hesston, Newton, and Sedgwick. For two years, Harvey County had the higher scores in this comparison of state and national level achievement; however, beginning in 2014, scores began to decline (Table 4.7, Figure 4.9).

Table 4.7
2016 Average ACT Scores (Highest Score Shaded)

	Harvey County	Kansas	United States
2016	21.5	21.8	20.8



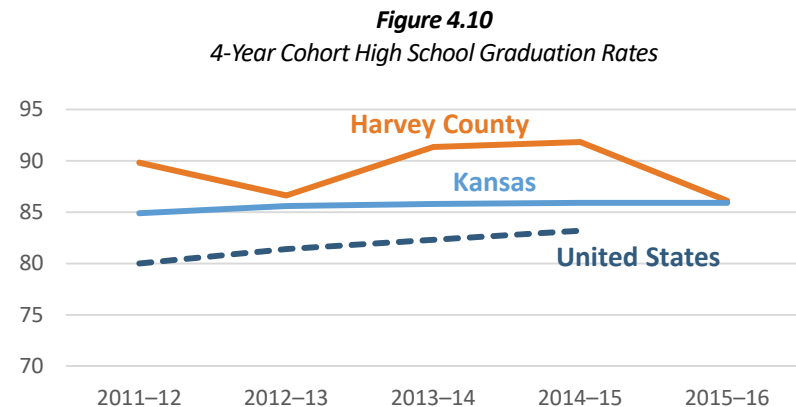
Source: The College Board, Kansas Department of Education, Garner Economics

High School Graduation Rates

The share of high school students who graduate within four years of beginning 9th grade is another important measure of the performance of local school districts. The four-year graduation rate in Harvey County has been higher than state and national rates consistently since the 2011-12 school year (Table 4.8). Rates dropped slightly in 2012-13 and again in 2015-16, however maintained a lead of the comparative groups (Figure 4.9). The national Graduation Rate for 2016 has not been released yet.

Table 4.8
4-Year Cohort High School Graduation Rates (Highest Score Shaded)

School Year	Harvey County	Kansas	United States
2011-12	89.8%	84.9%	80.0%
2012-13	86.6%	85.6%	81.4%
2013-14	91.3%	85.8%	82.3%
2014-15	91.8%	85.9%	83.2%
2015-16	86.1%	85.9%	N/A

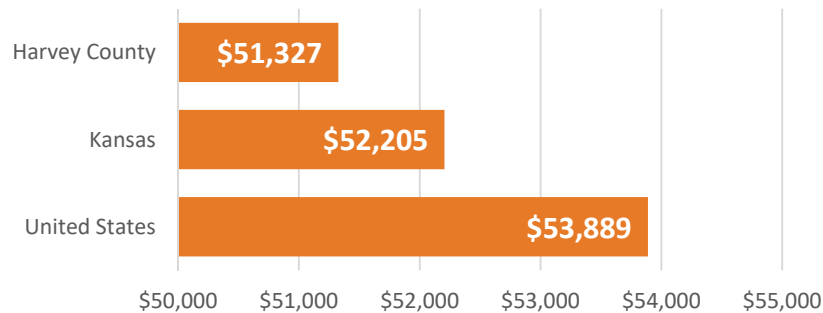


Source: The College Board, Kansas Department of Education, Garner Economics

Household Income

Household income reflects income for residents regardless of where they work. Harvey County has the highest percentage (except where tied with Kansas) of households with income from \$35,000 to \$149,000. All benchmarks had the same percentage of households with an income between \$15,000 to \$24,999 (Table 4.9, Figure 4.12). The median household income for Harvey County is \$51,327, which is lower than the state and nation (Figure 4.11).

Figure 4.11
Median Household Income



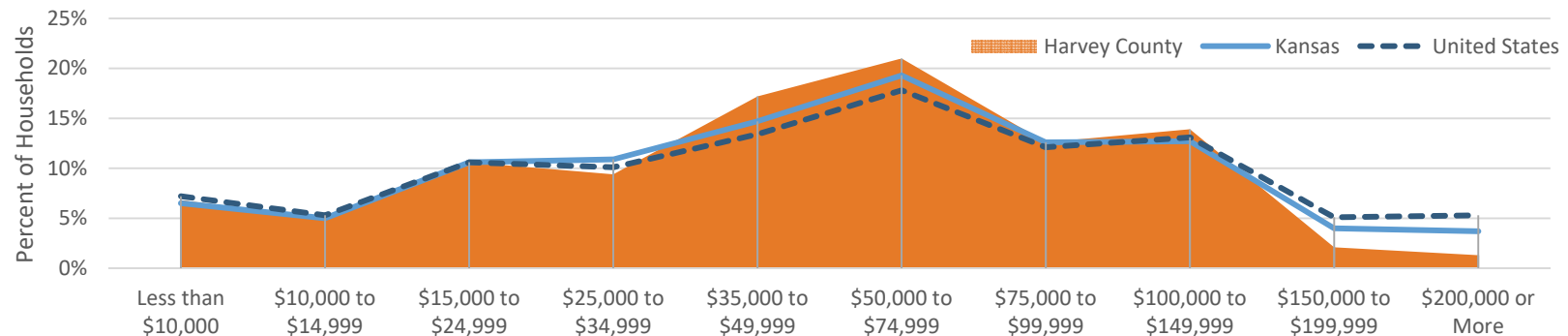
Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Table 4.9
Household Income
(Highest Relative Figure Shaded)

	Harvey County	Kansas	United States
Less than \$10,000	6.8%	6.5%	7.2%
\$10,000 to \$14,999	5.0%	5.0%	5.3%
\$15,000 to \$24,999	10.6%	10.6%	10.6%
\$25,000 to \$34,999	9.4%	10.9%	10.1%
\$35,000 to \$49,999	17.2%	14.7%	13.4%
\$50,000 to \$74,999	21.0%	19.3%	17.8%
\$75,000 to \$99,999	12.6%	12.6%	12.1%
\$100,000 to \$149,999	13.9%	12.7%	13.1%
\$150,000 to \$199,999	2.1%	4.0%	5.1%
\$200,000 or more	1.3%	3.7%	5.3%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Figure 4.12
Household Income



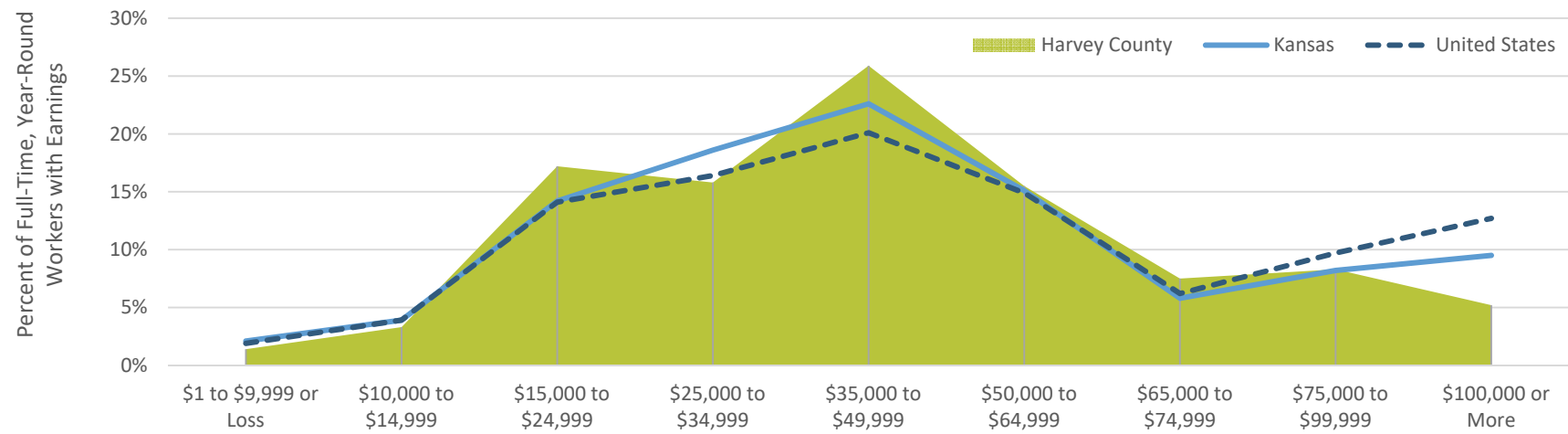
Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Individual Earnings

Earnings for individuals reflect the income for residents regardless of where they work or others’ earnings in their household. The data captures individuals ages 16 or over who are full-time, year-round workers with earnings.

Similar to household income, Harvey County has a lower average personal income than the state and nation (Table 4.10). Harvey County has a larger amount of individuals with income in the mid-ranges of the spectrum with the highest percentage of people making \$35,000 to \$49,999 (Figure 4.13).

Figure 4.13
Personal Income of Full-Time, Year-Round Workers



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Table 4.10
Average Individual Income
Full-Time, Year-Round Workers
(Highest Relative Figure in Green)

\$48,178
Harvey County

\$54,341
Kansas

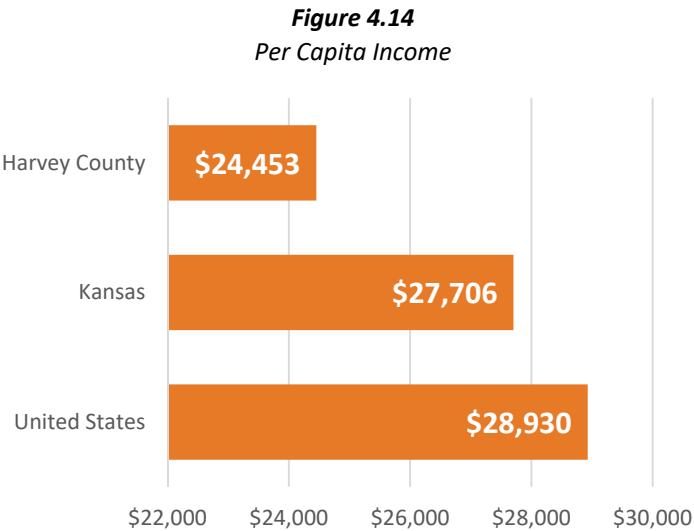
\$59,736
United States

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Per Capita Income

Per capita income is the mean annual income computed for every man, woman, and child. It is derived by dividing the aggregate income by the total population. Per capita income is a measure for all residents regardless of where they work, their age, or whether they derive any income.

For 2015, the per capita income in Harvey County was \$24,453, significantly lower than the state figure of \$27,706 and the national figure of \$28,930. (Figure 4.14).



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Poverty

The measurement of poverty in a community helps to evaluate the well-being of the citizens and the state of the economy.

Harvey County has the lowest percentage of its population below the poverty level and is below the nation for *Children Under 18 below Poverty Level* (Table 4.11).

Table 4.11
Poverty Estimates
(Highest Relative Figure Shaded)
(Lowest Relative Figure in Green)

	Harvey County	Kansas	United States
Percent below Poverty Level	13.2%	13.6%	15.5%
Children Under 18 below Poverty Level	20.2%	18.1%	21.7%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Crime Rates

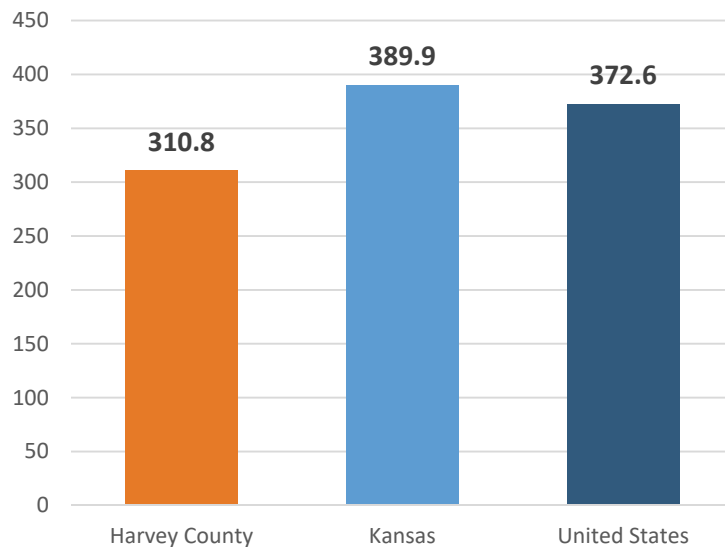
Crime rates may seem outside the typical measures of economic competitiveness, but these represent a widely accepted objective gauge used by firms. Crime rates generally reflect underlying economic conditions and may signal deeper systemic problems more so than standard economic measures show.

For 2015, Harvey County had a violent crime rate of 310.8 per 100,000 residents, below the state and the nation (Figure 4.15). The County was

also below the state and national property crime rate of 2,332.2 incidents report per 100,000 residents (Figure 4.16).

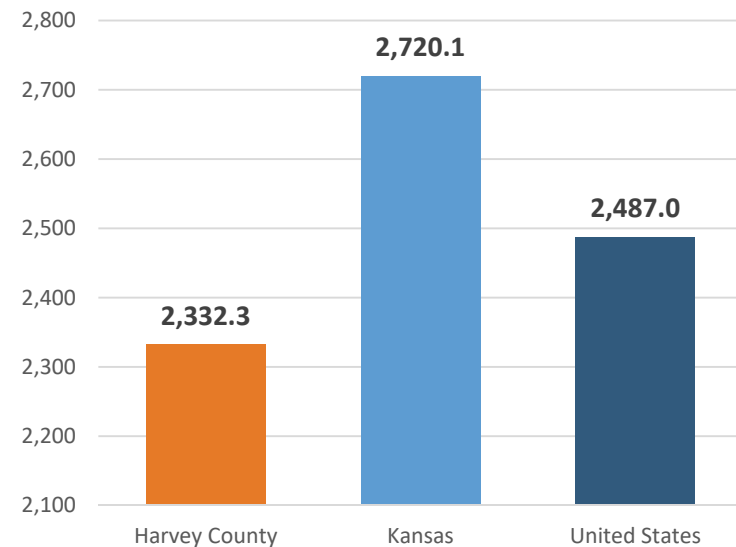
The Harvey County rate was compiled from the number of incidents reported by each law enforcement agency in the County. Pulling from FBI Uniform Crime Reports, the agencies reporting for 2015 included the Harvey County Sheriff's Department and police departments from Newton, North Newton, Halstead, and Hesston.

Figure 4.15
2015 Violent Crime Rates per 100,000 Residents



Source: FBI Uniform Crime Reports, Garner Economics

Figure 4.16
2015 Property Crime Rates per 100,000 Residents



Source: FBI Uniform Crime Reports, Garner Economics

Cost of Living

Generally speaking, Harvey County has an affordable cost of living compared to the nation and the state. The Cost-of-Living Index uses the national average for purchasing a set basket of goods and services.

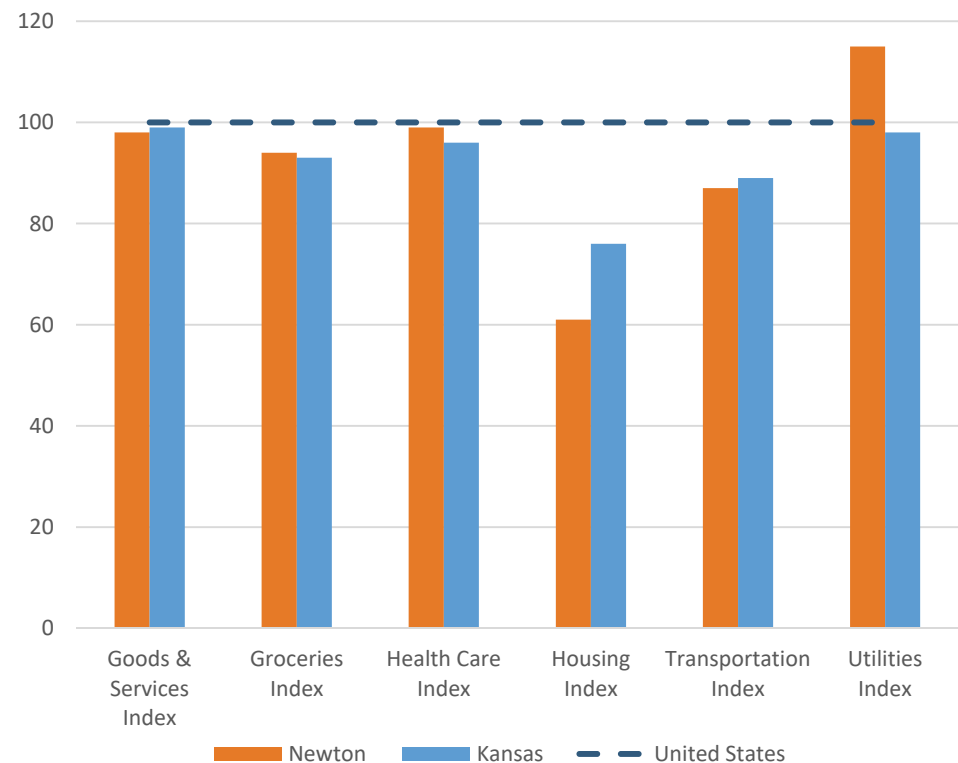
Table 4.12
Cost-of-Living Index, 4th Quarter 2015
(Lowest Relative Figure in **Green**)

	Harvey County	Kansas
Composite Cost-of-Living Index	87	90
Goods & Services	98	99
Groceries	94	93
Health Care	99	96
Housing	61	76
Transportation	87	89
Utilities	115	98

Source: AreaVibes.com 2016 (utilizing C2ER Cost of Living Index), Garner Economics

The composite Cost-of-Living Index for the City of Newton is 87 compared against a national average of 100. Each category under this composite score, with the exception of the Utilities Index, is lower than the national average (Table 4.12, Figure 4.17).

Figure 4.17
Cost-of-Living Index, 4th Quarter 2015



Source: AreaVibes.com 2016 (utilizing C2ER Cost of Living Index), Garner Economics

CHAPTER 5: LABOR MARKET ANALYSIS & EMPLOYMENT TRENDS

Labor Force Analysis—Residents & Workers



This chapter focuses on the labor market of Harvey County, Kansas, beginning with the residents within the County, then exploring commuting patterns with the surrounding area and the full labor force draw of a 50-mile radius.

The data then transitions to employer-based information presenting employment, industry composition, wage comparisons, and additional workplace statistics for those working in Harvey County.

Labor Force Participation

Among residents ages 16 and over in Harvey County, 63.6 percent are in the labor force, on par with the national participation rate of 63.7 percent. Both of these rates are below the statewide labor participation rate for Kansas at 67 percent. Although Harvey County is following a national trend of declining labor force participation, the County has experienced a change of 3.3 percent since 2010, the biggest decrease for all geographies studied (Table 5.1).

Of all the total families in the labor force, Harvey County has 43.3 percentage of families¹ with two income earners (*Married, Husband and Wife in Labor Force*)—higher than the nation and slightly below the state (Table 5.2, Figure 5.1). Harvey County has the highest percentage of married men in the labor force with one income (*Married, Husband in Labor Force, Wife Not*) at 19.5 percent. The total percentage of families in the labor force is 81.4 percent in Harvey County.

1. A family consists of a householder (the person or one of the people in whose name the home is owned or rented) and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption.

Chapter Data

- Labor Force Participation
- Commuting Patterns
- Estimated Average Annual Wage
- Self-Employment
- Broadband
- Labor Force Draw
- New Firms Startups
- Major Industry Sector Composition
- Unionization

Table 5.1
Labor Force Participation
5-Year Change 2010–2015
(Highest Relative Figure Shaded)

	2010	2015	5-Year Change
Harvey County	66.9%	63.6%	-3.3%
Kansas	68.7%	67.0%	-1.7%
United States	65.0%	63.7%	-1.3%

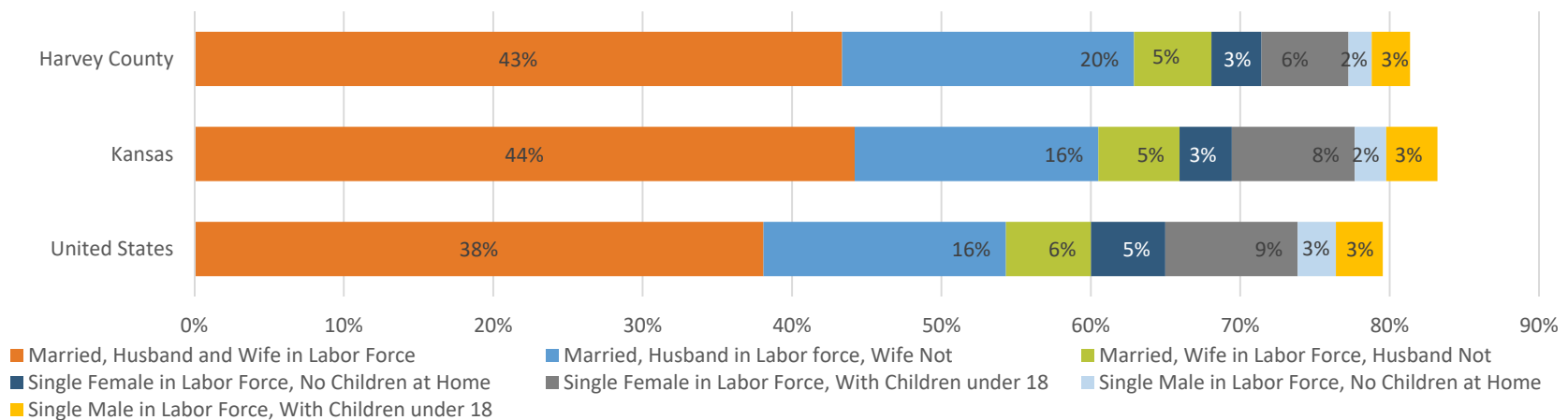
Source: U.S. Census Bureau American Community Survey 2011-2015, 5-Year Average compared to the 2006–2010, 5-Year Average; Garner Economics

Table 5.2
2015 Labor Force Participation
Percentage of All Families
(Highest Relative Figure Shaded)

	Harvey County	Kansas	United States
Married-Couple Families			
Married, Husband and Wife in Labor Force	43.3%	44.2%	38.1%
Married, Husband in Labor force, Wife Not	19.5%	16.3%	16.2%
Married, Wife in Labor Force, Husband Not	5.2%	5.4%	5.7%
Other Families			
Unmarried Female in Labor Force, No Husband Present, No Children at Home	3.4%	3.5%	5.0%
Unmarried Female in Labor Force, No Husband Present, With Children under 18	5.8%	8.2%	8.9%
Unmarried Male in Labor Force, No Wife Present, No Children at Home	1.6%	2.1%	2.6%
Unmarried Male in Labor Force, No Wife Present, With Children under 18	2.6%	3.4%	3.1%
Total Families in the Labor Force	81.4%	83.2%	79.5%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Figure 5.1
2015 Labor Force Participation
Percentage of All Families



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics

Labor Draw

The labor force for Harvey County was estimated to be 17,417 annual average for 2016. Comparing this to the level of the labor force in 2006, there was a 2.7 percent decrease over this period (Table 5.3). Kansas and the United States both experienced growth during this period. For the past 5 years, this trend has changed with a slight increase over this time for Harvey County, a decline for Kansas, and a 3.6 percent increase for the nation.

The effective labor draw considers the documented labor pool for a particular geographic location based on the existing residential workforce and local road network. The analysis considers the pool of

active workers residing within representative drive time radiuses from a site.

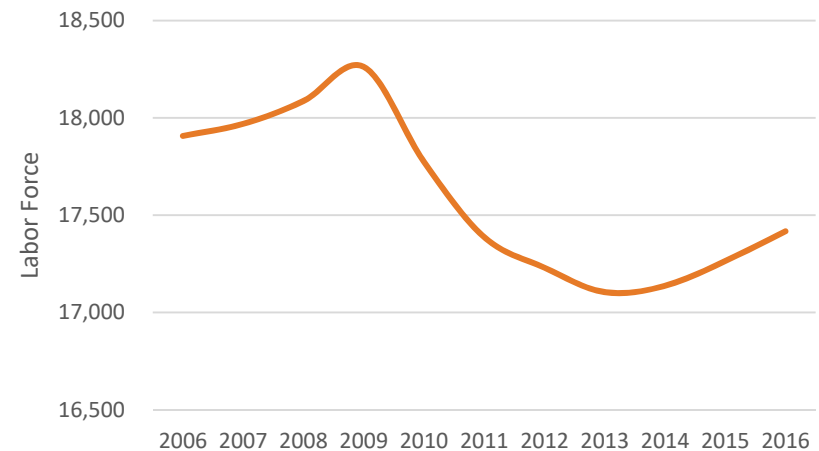
According to a calculation of a 50-mile radius from Newton in Harvey County, the estimated civilian labor force is 378,769 for 2016 (Table 5.4, Figure 5.3). Newton was selected as the center for this study due to its status as the County seat, as well as being the most populous city in the County and having an established employment base and interstate access.

Table 5.3
2006–2016 Annual Average Labor Force
(Highest Relative Figure Shaded)

	Harvey County	Kansas	United States
2006	17,907	1,467,095	151,408,833
2011	17,387	1,491,087	153,623,667
2016	17,417	1,484,001	159,186,417
Change 2006–2015	-2.7%	1.2%	5.1%
Change 2011–2015	0.2%	-0.5%	3.6%

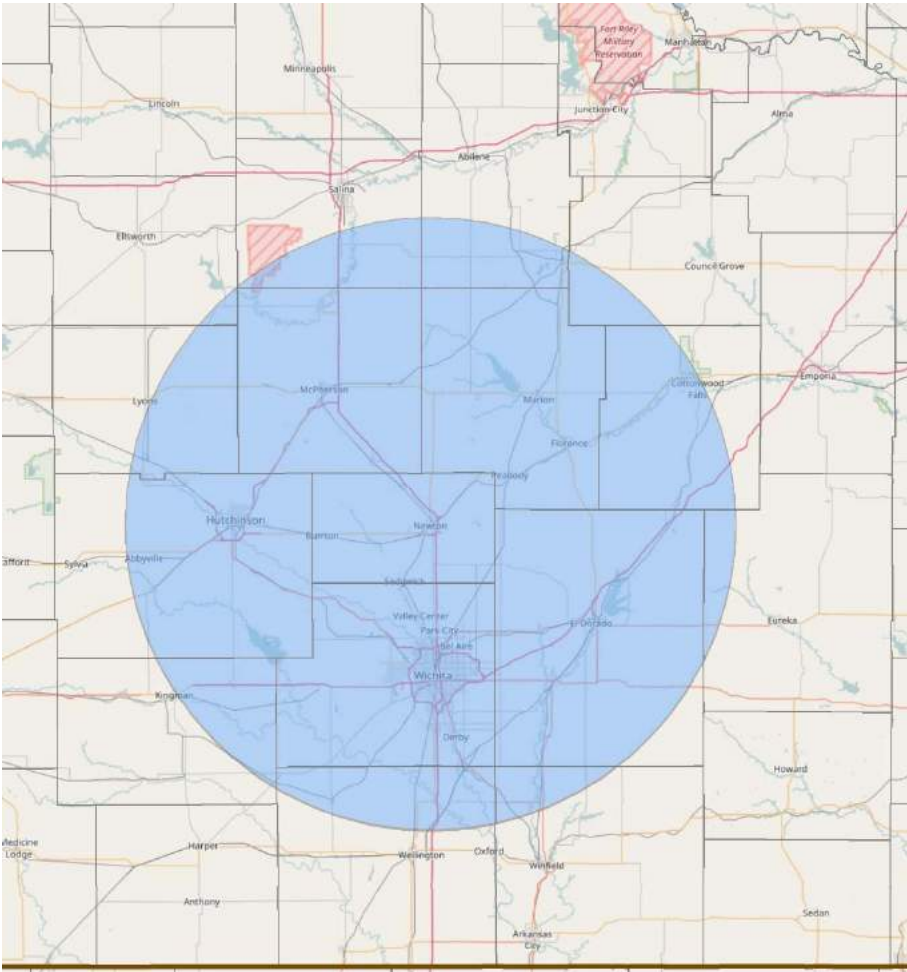
Source: U.S. Bureau of Labor Statistics, LAUS & CPS series, Garner Economics

Figure 5.2
2006–2016 Annual Average Labor Force



Source: U.S. Bureau of Labor Statistics, LAU.S. series, Garner Economics

Figure 5.3
Harvey County Labor Draw
50-Mile Radius



Source: ESRI, Garner Economics

Table 5.4
2016 Harvey County Labor Draw
50-Mile Radius

50-Mile Radius of Newton, Kansas	
Total Population	755,804
Estimated Labor Force	378,769
Manufacturing Workforce	59,744
Estimated Unemployed	21,275

Source: ESRI, Garner Economics



Commuting Patterns

Worker flows help define the size of a local economy’s labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments (major construction projects, on-site consulting, etc.).

In 2014, of the 14,707 employed residents of Harvey County, 7,200 (or 49 percent of the resident workforce) also worked within the County. The remaining 51 percent, or 7,507 workers, traveled outside of Harvey County for work (out-commuters).

Between 2005 and 2014, the number of workers who both live and work in Harvey County declined 7.9 percent, representing 614 residents. Over the same period, out-commuters, or those *Living in Harvey County but Employed Outside*, increased by 20.8 percent or nearly 1,300 workers. The number of workers *Employed in Harvey County but Living*

Outside (in-commuters) increased 17.5 percent, or 876 more workers (Table 5.5, Figure 5.5).

Of those commuting out of Harvey County, neighboring Sedgwick County is the leading destination of out-commuters, with more than 4,000 workers commuting. A majority of those workers are traveling to Wichita, the number one city for both in and out-commuters (Figure 5.6). Sedgwick County is also the top county for in-commuters with more than 2,000 workers traveling into Harvey County for work (Figure 5.5).

Harvey County has a short commute compared to the nation and the state with an average travel time to work of 17.8 minutes compared to Kansas (19.1) and the United States (25.9) (Table 5.6).

Table 5.5

2005–2014 Harvey County Commuting Changes

	2005	2014	2005–2014 Change	
			#	%
Living and Employed in Harvey County	7,814	7,200	-614	-7.9%
Living in Harvey but Employed Outside (Out-Commuters)	6,215	7,507	1,292	20.8%
Employed in Harvey but Living Outside (In-Commuters)	5,007	5,883	876	17.5%

*The Census Bureau counts one primary job per worker.

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

Table 5.6

2015 Average Travel Time to Work (in Minutes)

17.8	19.1	25.9
Harvey County	Kansas	United States

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average; Garner Economics



Figure 5.4
2014 Harvey County Commuting



Figure 5.5
2014 Harvey County In-Commuting

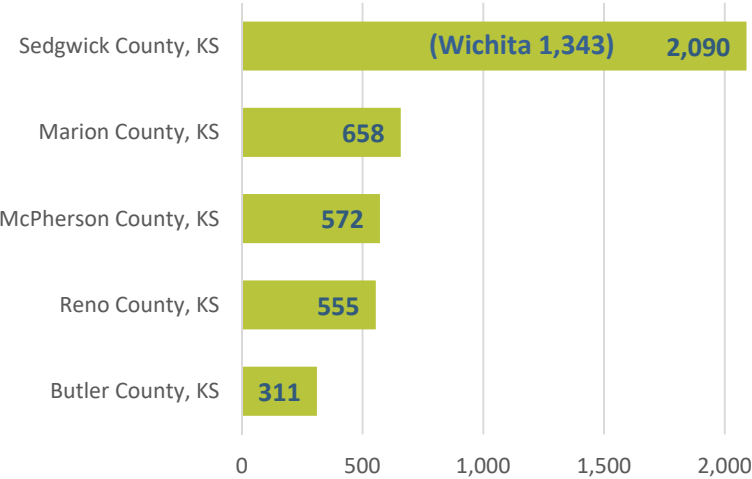
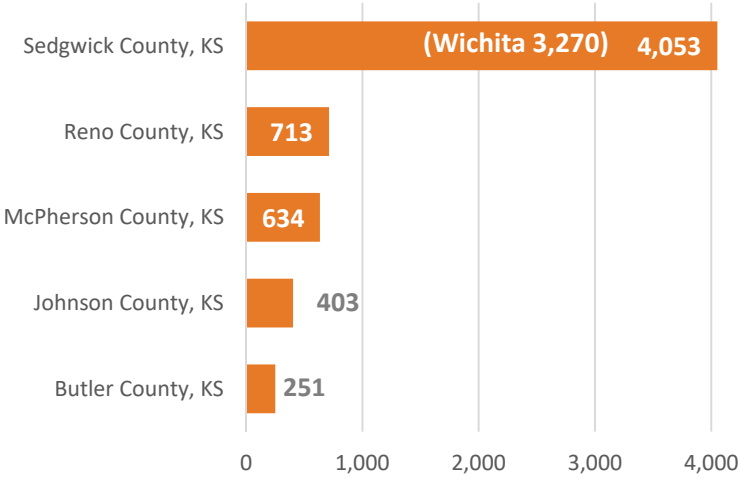


Figure 5.5
2014 Harvey County Out-Commuting



**The Census Bureau counts one primary job per worker.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics*

Major Industry Sector Composition

A comparison of major industry employment composition provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness. Harvey County has the highest relative proportion of total employment in four major industry sectors: *Manufacturing, Health Care and Social Assistance, Construction, and Educational Services* (Table 5.7).

Harvey County is particularly dominant in the *Manufacturing* sector with 24 percent of the County's employment in production. The second highest employment sector is *Health Care and Social Assistance*, with 18.5 percent of jobs within those fields.

A detailed analysis of Harvey County's industrial and occupational specialization relative to the nation can be found in Chapter 7: Local Specialization, Competitiveness & Growth and in the Appendices.

Table 5.7

2016 Industry Sector Composition: (Highest Relative Figure Shaded) (Highest Industry for each Geography Highlighted in Green)

NAICS	Industry Sector	Harvey County	Kansas	United States
31	Manufacturing	24.0%	10.4%	8.0%
62	Health Care and Social Assistance	18.5%	12.0%	12.5%
90	Government	13.0%	18.4%	15.4%
44	Retail Trade	10.2%	10.0%	10.4%
72	Accommodation and Food Services	6.2%	7.2%	8.5%
23	Construction	5.6%	5.0%	5.4%
61	Educational Services	4.5%	1.6%	2.5%
81	Other Services (except Public Administration)	4.1%	4.4%	4.8%
52	Finance and Insurance	2.4%	4.1%	3.9%
56	Administrative and Support and Waste Management and Remediation Services	2.3%	5.7%	6.2%
54	Professional, Scientific, and Technical Services	2.2%	5.2%	6.4%
48	Transportation and Warehousing	2.0%	3.5%	3.4%
11	Crop and Animal Production	1.5%	2.2%	1.2%
42	Wholesale Trade	1.4%	3.9%	3.8%
53	Real Estate and Rental and Leasing	0.7%	1.2%	1.6%
71	Arts, Entertainment, and Recreation	0.5%	1.2%	1.7%
51	Information	0.3%	1.4%	1.9%
55	Management of Companies and Enterprises	0.2%	1.7%	1.4%
21	Mining, Quarrying, and Oil and Gas Extraction	0.2%	0.5%	0.4%
22	Utilities	0.1%	0.4%	0.4%

Source: EMSI 2016, Garner Economics

Estimated Average Annual Wage

In 2016, the estimated average annual wage per job in Harvey County equaled \$34,598 annually, or \$665 weekly.² It should be noted that the wage applies only to **employment in Harvey County** and does not measure wages for those workers who live in Harvey County but commute outside the area (Figure 5.6). The annual average earnings for all Harvey County residents, whether they stay in the County for work or out-commute, is a much higher value of \$48,178 for 2015. (See Individual Earnings in Chapter 4).

Over the last decade, the estimated average annual wage in Harvey County increased by \$6,053 or 21.2 percent, the highest growth rate for all geographies (Table 5.8). Even with this substantial increase, the County's annual average wages are still significantly below the state and nation. Adjusted for inflation, the past two years have seen modest increases in comparison to the state and nation (Figure 5.7).

Table 5.8

2006–2016 Change in Estimated Average Annual Wage:
(Highest Relative Number Shaded)

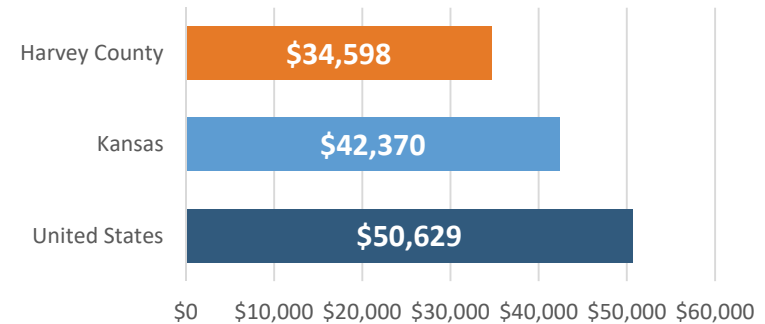
	Harvey County	Kansas	United States
2016	\$34,598	\$42,370	\$50,629
2012–2016 Change			
#	\$1,494	\$2,428	\$1,654
%	4.5%	6.1%	3.5%
Change 2007–2016			
#	\$6,053	\$6,445	\$8,056
%	21.2%	17.9%	18.9%

Source: EMSI 2016, Garner Economics

2. Based on total wage and salary disbursements divided by the number of wage and salary jobs (total wage and salary employment) as reported by the Bureau of Labor Statistics. EMSI includes covered, non-covered wages and self-employment.

Figure 5.6

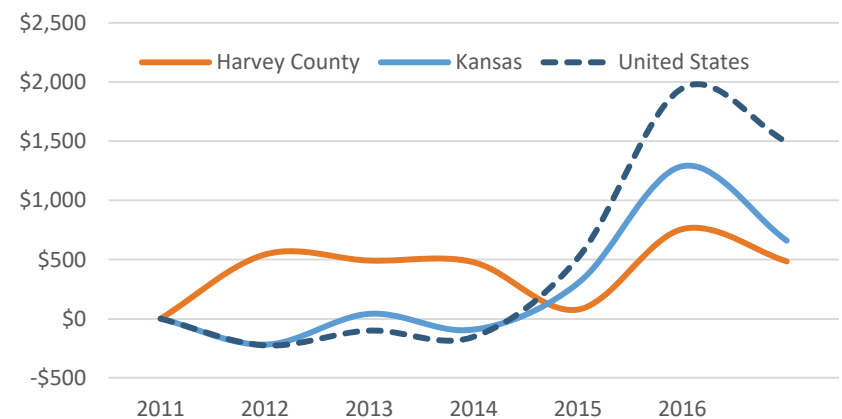
2016 Estimated Average Annual Wage



Source: EMSI 2016, Garner Economics

Figure 5.7

2011–2016 Change in Average Annual Wage
Adjusted for Inflation (2015 dollars) 2011=0



Source: EMSI 2016, Garner Economics

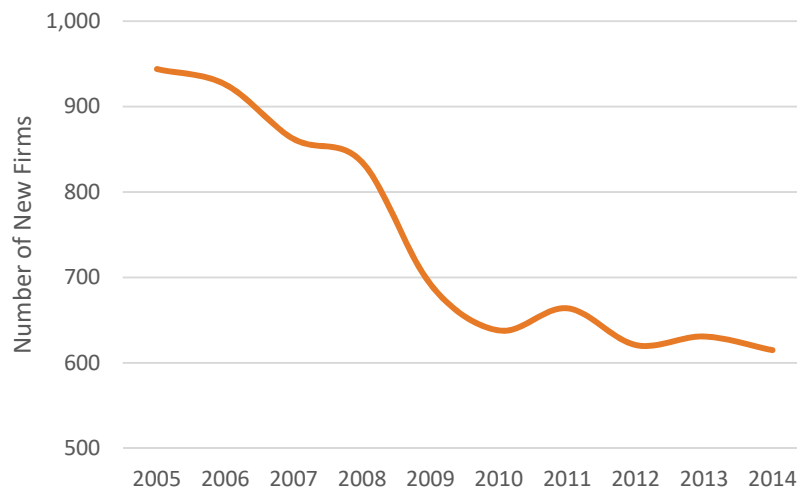
Startup rate

Tracking the rate of startup firms is another good measure of the entrepreneurial ecosystem of an area. The ability to create a new company, which establishes new jobs, bolsters the local economy.

The Wichita MSA, which Harvey County is a part of, had 615 new firms started in 2014. This is down from a peak of 944 new firms in 2005 and has relatively leveled off since 2010 (Figure 5.8).

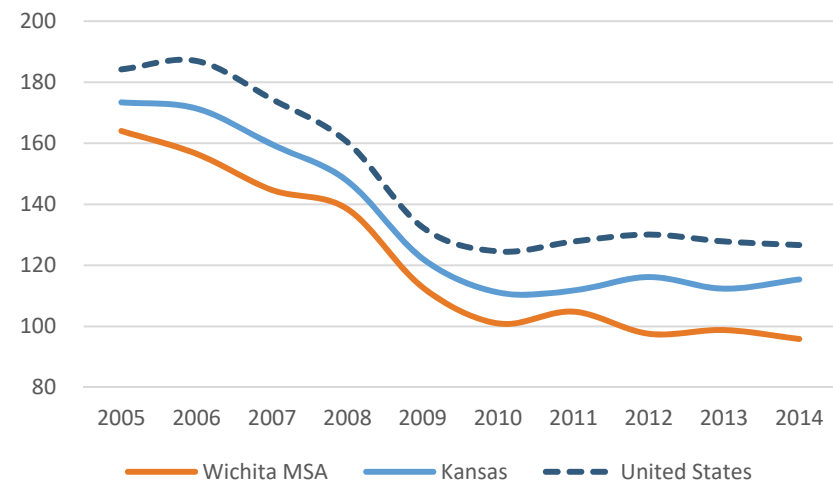
New firm creation has slowed for the nation as well as Kansas. Looking at the number of startups per 100,000 population, it is evident that the Wichita MSA matches the pace of the state and the nation (Figure 5.9).

Figure 5.8
2005–2014 Number of Startups
Wichita MSA



Source: U.S. Census Bureau, Business Dynamics Statistics

Figure 5.9
2005–2014 Startups per 100,000 population



Source: U.S. Census Bureau, Business Dynamics Statistics

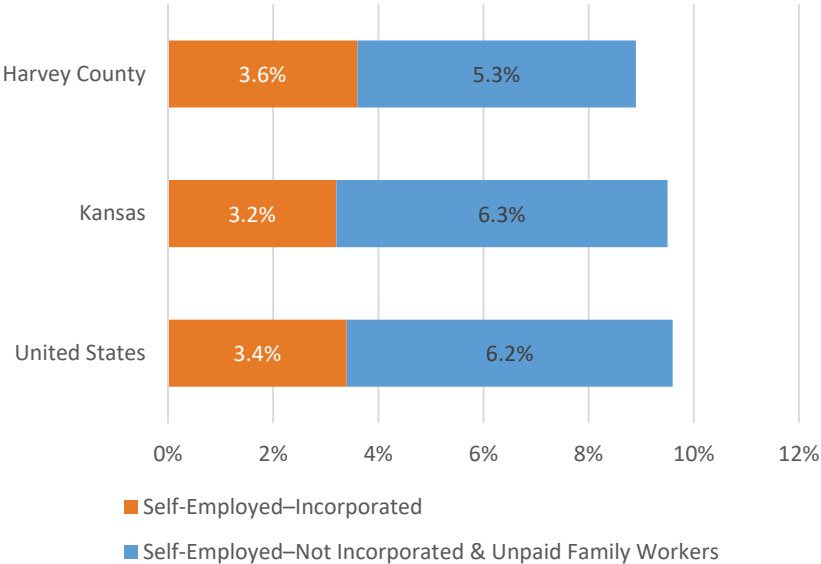
Self-Employed

Measuring the relative proportion of persons who are self-employed is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

Harvey County has a total of 8.9 percent of the labor force engaged in self-employment—3.6 percent are incorporated and 5.3 percent are not incorporated or are unpaid family workers. This is below the percentages

at the state and national level for self-employment (Figure 5.10). Self-employment levels have decreased among those who are *Self-Employed-Not Incorporated & Unpaid Family Workers* for all geographies (Table 5.9). Incorporated Self-Employment has increased in Harvey County, which is the only area or category that showed growth between 2010 and 2015.

Figure 5.10
Self-Employed as a Percentage of Workers 16 Years +



Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Table 5.9
2010–2015 Change in Self Employment
Self-Employed as a Percentage of Workers 16 Years+

	Self-Employed-Incorporated	Self-Employed–Not Incorporated & Unpaid Family Workers	Self-Employed Total
Harvey County			
2010	2.5%	8.6%	11.1%
2015	3.6%	5.3%	8.9%
Kansas			
2010	3.2%	7.3%	10.5%
2015	3.2%	6.3%	9.5%
United States			
2010	3.6%	6.7%	10.3%
2015	3.4%	6.2%	9.6%

Source: U.S. Census Bureau American Community Survey 2011–2015, 5-Year Average;
Garner Economics

Unionization

Utilizing observations from the Bureau of Labor Statistics' Current Population Survey, an estimate of the rate of private and public worker unionization at the metropolitan level can be constructed. Unionization information is only available at the Metro level or larger. Rates reflect the percentage of workers who are members of a union.

The rate of private worker unionization observed for the Wichita MSA in 2016 was 4.7 percent, below the national and statewide rates (Table 5.10, Figure 5.11). The Wichita MSA also ranked below Kansas for public and total rates; however, it maintained levels below the United States.

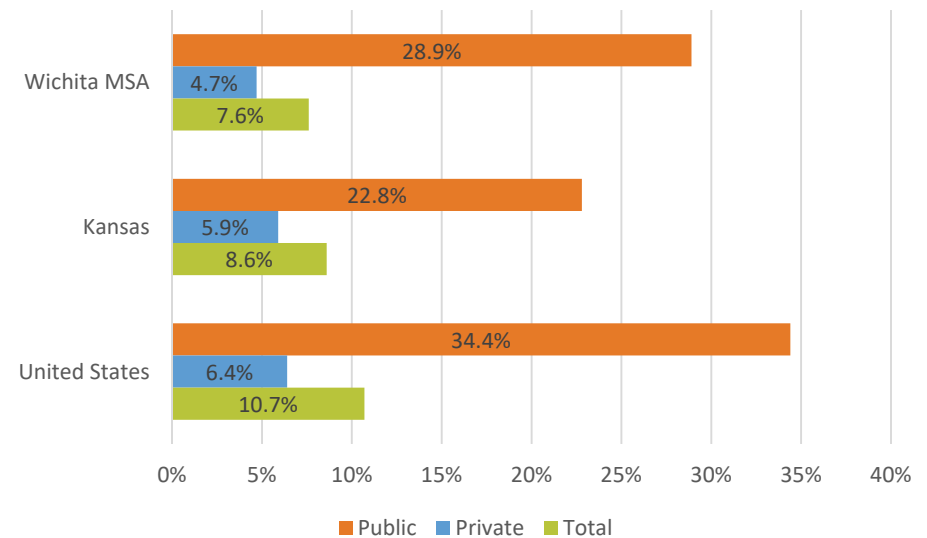
Table 5.10
2016 Unionization Rates
Highest Relative Number Shaded

	Public	Private	Total
Wichita MSA	28.9%	4.7%	7.6%
Kansas	22.8%	5.9%	8.6%
United States	34.4%	6.4%	10.7%

Data were only reported at the MSA level

Source: © 2015 by Barry T. Hirsch and David A. Macpherson, Garner Economics

Figure 5.11
2016 Unionization Rates



Data were only reported at the MSA level

Source: © 2015 by Barry T. Hirsch and David A. Macpherson, Garner Economics

Broadband

According to the National Telecommunications and Information Administration, households in Harvey County have very good access to *DSL or Cable* service as well as access to *Two or More Wireline Providers*. (Table 5.11).

Testing speeds were not available for *Medium & Large Businesses*, *Small Business* data and *Residential* data were used to compare the level of connectivity. Download and upload speeds lagged for *Small Business* tests; however, *Residential* speeds were faster than the state and the nation.

Table 5.11
2014 Broadband Availability & Speed
Highest Relative Figure Shaded

	Harvey County	Kansas	Nationwide
Availability			
DSL	88.7%	86.2%	90.0%
Cable	85.5%	83.1%	88.8%
Two or More Wireline Providers	83.6%	81.2%	88.2%
Speed (megabytes per second or Mbps)			
Small Business			
Median Download	2.26	3.46	4.39
Median Upload	0.79	0.87	1.26
Residential			
Median Download	7.02	4.4	6.7
Median Upload	2.46	0.7	1.0

Source: National Telecommunications and Information Administration as of June 30, 2014

Chapter 6: Retail Analysis



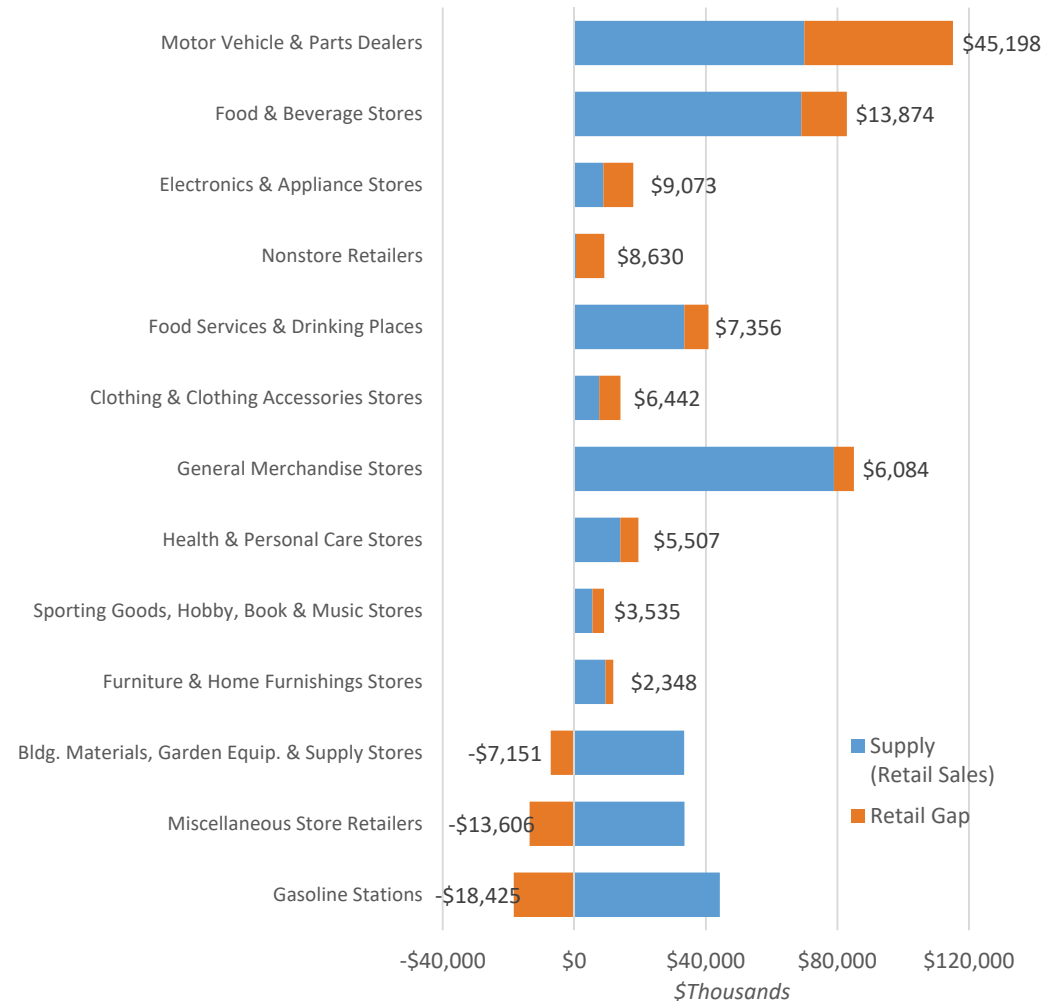
To determine specific industries with Retail Potential, a Retail Gap analysis was conducted. Retail Gap, or leakage represents the dollar amount that shoppers from Harvey County spent, or “leaked” outside of the local economy. If the Retail Gap is a high proportion of Harvey County residents’ total dollars spent in a particular trade area, the community could potentially support more businesses in that area.

Supply (Retail Sales) estimates sales to consumers by establishments. Demand (Retail Potential—not on graph) estimates the expected amount spent by consumers at retail establishments. The Retail Gap represents the difference between Retail Potential and Retail Sales. Negative values show a market where customers are drawn in from outside the area.

Overall, Harvey County’s Retail Sales show that there are several categories that have a negative Retail Gap, most likely drawing in buyers from outside the area: *Building Materials, Garden Equipment & Supply Stores; Miscellaneous Stores; and Gasoline Stations* (Figure 6.1).

The highest Retail Gap is in the *Motor Vehicle & Parts Dealers* with \$45 million in sales outside of the county or “leakage” and \$70 million in total sales by residents.

Figure 6.1
Retail Sales & Retail Gap (\$Millions)



**Industries belonging to NAICS 721 & 722: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.*

Source: ESRI, Garner Economics

Table 6.1

Retail Sales & Retail Gap (\$Thousands)

Industry Group	NAICS Code	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
Motor Vehicle & Parts Dealers	441	\$115,146	\$69,948	\$45,198
Automobile Dealers	4411	\$73,708	\$56,842	\$16,865
Other Motor Vehicle Dealers	4412	\$35,295	\$5,615	\$29,680
Auto Parts, Accessories & Tire Stores	4413	\$6,144	\$7,490	-\$1,347
Furniture & Home Furnishings Stores	442	\$11,831	\$9,483	\$2,348
Furniture Stores	4421	\$8,399	\$2,493	\$5,906
Home Furnishings Stores	4422	\$3,432	\$6,990	-\$3,558
Electronics & Appliance Stores	443	\$17,919	\$8,846	\$9,073
Bldg. Materials, Garden Equip. & Supply Stores	444	\$26,281	\$33,431	-\$7,151
Bldg. Material & Supplies Dealers	4441	\$23,500	\$29,341	-\$5,841
Lawn & Garden Equip & Supply Stores	4442	\$2,780	\$4,090	-\$1,310
Food & Beverage Stores	445	\$82,871	\$68,997	\$13,874
Grocery Stores	4451	\$73,512	\$61,103	\$12,409
Specialty Food Stores	4452	\$2,658	\$919	\$1,740
Beer, Wine & Liquor Stores	4453	\$6,702	\$6,976	-\$274
Health & Personal Care Stores	446	\$19,512	\$14,006	\$5,507
Gasoline Stations	447	\$25,841	\$44,265	-\$18,425
Clothing & Clothing Accessories Stores	448	\$14,024	\$7,582	\$6,442
Clothing Stores	4481	\$9,458	\$5,149	\$4,309
Shoe Stores	4482	\$1,642	\$739	\$903
Jewelry, Luggage & Leather Goods Stores	4483	\$2,924	\$1,694	\$1,230

Table 6.1, continued

Industry Group	NAICS Code	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
Sporting Goods, Hobby, Book & Music Stores	451	\$9,056	\$5,521	\$3,535
Sporting Goods/Hobby/Musical Instr. Stores	4511	\$7,404	\$4,193	\$3,211
Book, Periodical & Music Stores	4512	\$1,653	\$1,329	\$324
General Merchandise Stores	452	\$85,044	\$78,960	\$6,084
Department Stores Excluding Leased Depts.	4521	\$64,900	\$73,517	-\$8,617
Other General Merchandise Stores	4529	\$20,144	\$5,443	\$14,701
Miscellaneous Store Retailers	453	\$19,875	\$33,481	-\$13,606
Florists	4531	\$964	\$18,067	-\$17,103
Office Supplies, Stationery & Gift Stores	4532	\$4,181	\$858	\$3,323
Used Merchandise Stores	4533	\$1,852	\$4,200	-\$2,348
Other Miscellaneous Store Retailers	4539	\$12,879	\$10,357	\$2,523
Nonstore Retailers	454	\$9,153	\$523	\$8,630
Electronic Shopping & Mail-Order Houses	4541	\$5,446	\$164	\$5,282
Vending Machine Operators	4542	\$676	\$359	\$317
Direct Selling Establishments	4543	\$3,031	\$0	\$3,031
Food Services & Drinking Places	722	\$40,821	\$33,465	\$7,356
Special Food Services	7223	\$469	\$2,487	-\$2,018
Drinking Places - Alcoholic Beverages	7224	\$3,044	\$201	\$2,843
Restaurants/Other Eating Places	7225	\$37,309	\$30,777	\$6,531
Total Retail Demand and Leakage	722	\$477,375	\$408,510	\$68,864

Source: ESRI, Garner Economics

Data Note: Supply (Retail Sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (Retail Potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. A positive value represents "leakage" of retail opportunity outside the trade area. A negative value represents a surplus of Retail Sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

Chapter 7: Local Specialization, Competitiveness & Growth



The following section provides a more detailed and in-depth assessment of the Harvey County economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities.

The two main areas of analysis are: major industries and occupational groups. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

Chapter Data

- Major Industry Sector Change
- Industry Earnings
- Occupational Change
- Occupational Earnings
- Industry & Occupational Local Specialization, Competitiveness & Growth

Major Industry Sector Change

Over the last five years, the largest absolute industry job gains in Harvey County came from *Manufacturing*, up 756 jobs or 24 percent and *Health Care & Social Assistance*, which added 228 jobs or 8 percent (Table 7.1, Figure 7.1).

Other gains were made in *Administrative, Support, Waste Management & Remediation Services* (95 jobs/34 percent); *Crop & Animal Production* (81 jobs/51 percent); *Transportation & Warehousing* (54 jobs/20 percent); and *Retail Trade* (52 jobs/3 percent).

There were no significant job losses; no sector declined more than 30 jobs. For several sectors, the job loss was about 20 percent of the industry employment

The three sectors which experienced loss of 20 percent include *Information* (-11 jobs/20 percent); *Arts, Entertainment, and Recreation* (-22 jobs/ 20 percent); and *Real Estate, Rental & Leasing* (-29 jobs/20 percent).

Figure 7.1

2011–2016 Employment Change by Major Industry

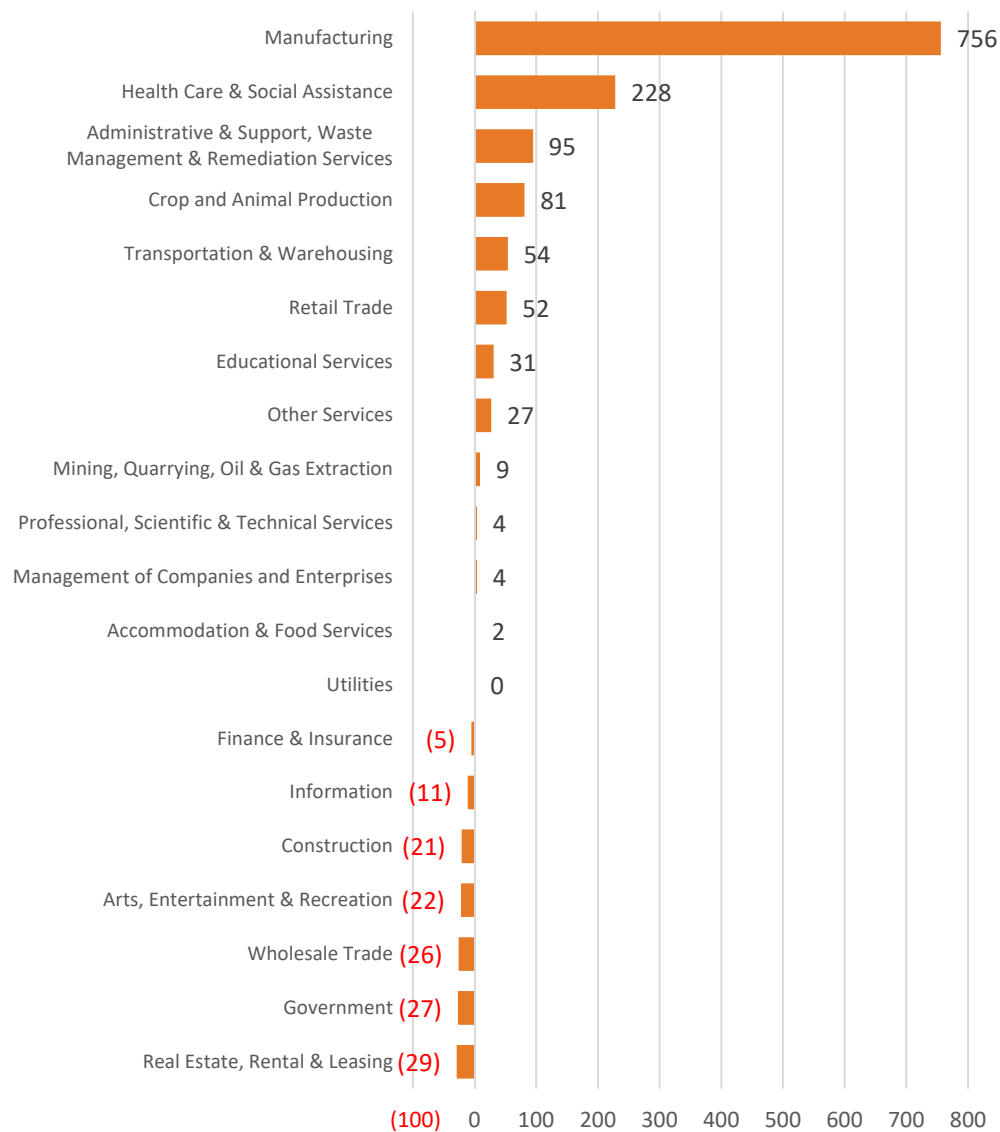


Table 7.1

2011–2016 Employment Change by Major Industry

Industry Sector	2016 Jobs	Employment Change	Percent Change
Manufacturing	3,942	756	24%
Health Care & Social Assistance	3,035	228	8%
Administrative & Support, Waste Management & Remediation Services	375	95	34%
Crop and Animal Production	241	81	51%
Transportation & Warehousing	328	54	20%
Retail Trade	1,682	52	3%
Educational Services	742	31	4%
Other Services	680	27	4%
Mining, Quarrying, Oil & Gas Extraction	30	9	43%
Professional, Scientific & Technical Services	361	4	1%
Management of Companies and Enterprises	40	4	11%
Accommodation & Food Services	1,023	2	0%
Utilities	14	0	Insf. Data
Finance & Insurance	400	(5)	(1%)
Information	44	(11)	(20%)
Construction	916	(21)	(2%)
Arts, Entertainment & Recreation	88	(22)	(20%)
Wholesale Trade	232	(26)	(10%)
Government	2,141	(27)	(1%)
Real Estate, Rental & Leasing	119	(29)	(20%)

Source for Table 7.1 and Figure 7.1: ESMI, Garner Economics

Industry Earnings

A comparison of Harvey County industry earnings to state and national averages may offer insights into areas of unique expertise or cost-saving opportunities. The *Utilities* and *Transportation & Warehousing* industry sectors had average wages above the nation and state and topped the list for highest industry averages for Harvey County (Table 7.2).

Five industry sectors in Harvey County have wages under half the rate of national averages: *Management of Companies & Enterprises* (55 percent lower); *Finance & Insurance* (56 percent lower); *Information* (61 percent lower) *Real Estate, Rental & Leasing* (50 percent lower); and *Educational Services* (53 percent lower). The *All Industry* average salary for Harvey County is 32 percent under the national average wage and 18 percent under the state average wage.

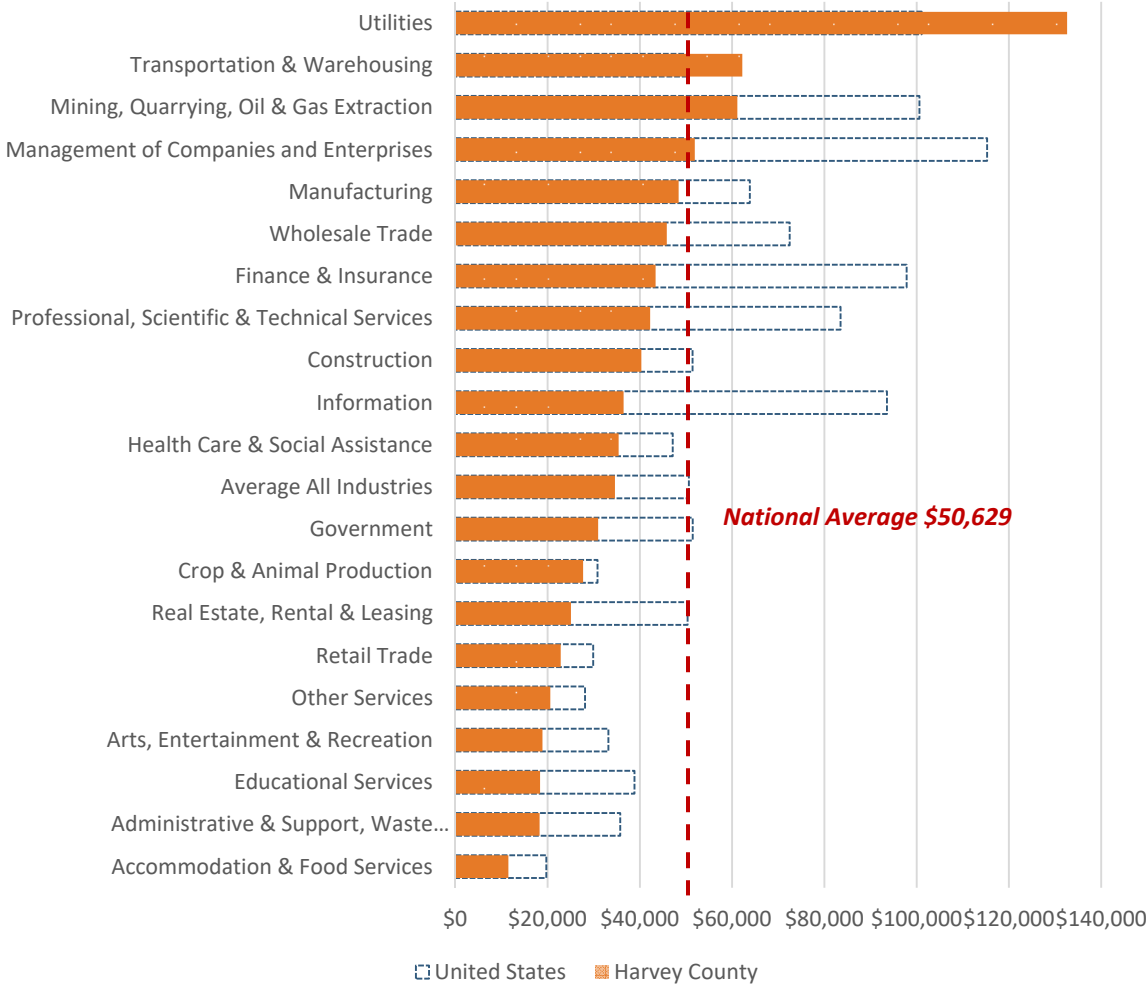
Table 7.2

2016 Average Annual Industry Salary Comparison: Salaries Above the National Average highlighted in Green and Above Kansas in Bold

Industry Sector	Harvey County	United States	United States	Kansas	Kansas
Utilities	\$132,627	\$101,080	31%	\$85,175	56%
Transportation & Warehousing	\$62,224	\$50,230	24%	\$47,868	30%
Mining, Quarrying, Oil & Gas Extraction	\$61,145	\$100,591	-39%	\$53,825	14%
Management of Companies and Enterprises	\$51,911	\$115,285	-55%	\$95,992	-46%
Manufacturing	\$48,416	\$63,850	-24%	\$55,225	-12%
Wholesale Trade	\$45,849	\$72,489	-37%	\$64,391	-29%
Finance & Insurance	\$43,399	\$97,817	-56%	\$67,632	-36%
Professional, Scientific & Technical Services	\$42,229	\$83,514	-49%	\$64,234	-34%
Construction	\$40,321	\$51,422	-22%	\$46,374	-13%
Information	\$36,489	\$93,576	-61%	\$59,117	-38%
Health Care & Social Assistance	\$35,401	\$47,125	-25%	\$40,302	-12%
Government	\$30,953	\$51,463	-40%	\$40,960	-24%
Crop and Animal Production	\$27,720	\$30,829	-10%	\$31,658	-12%
Real Estate, Rental & Leasing	\$25,078	\$50,359	-50%	\$38,789	-35%
Retail Trade	\$22,844	\$29,898	-24%	\$26,241	-13%
Other Services	\$20,579	\$28,106	-27%	\$24,171	-15%
Arts, Entertainment & Recreation	\$18,898	\$33,168	-43%	\$18,309	3%
Educational Services	\$18,382	\$38,843	-53%	\$28,413	-35%
Administrative & Support, Waste Management & Remediation Services	\$18,263	\$35,762	-49%	\$34,113	-46%
Accommodation & Food Services	\$11,504	\$19,727	-42%	\$15,298	-25%
Average All Industries	\$34,598	\$50,629	-32%	\$42,370	-18%



Figure 7.2
2016 Average Annual Industry Salary Comparison



Source for Table 7.2 and Figure 7.1: ESMI, Garner Economics

Major Occupational Change

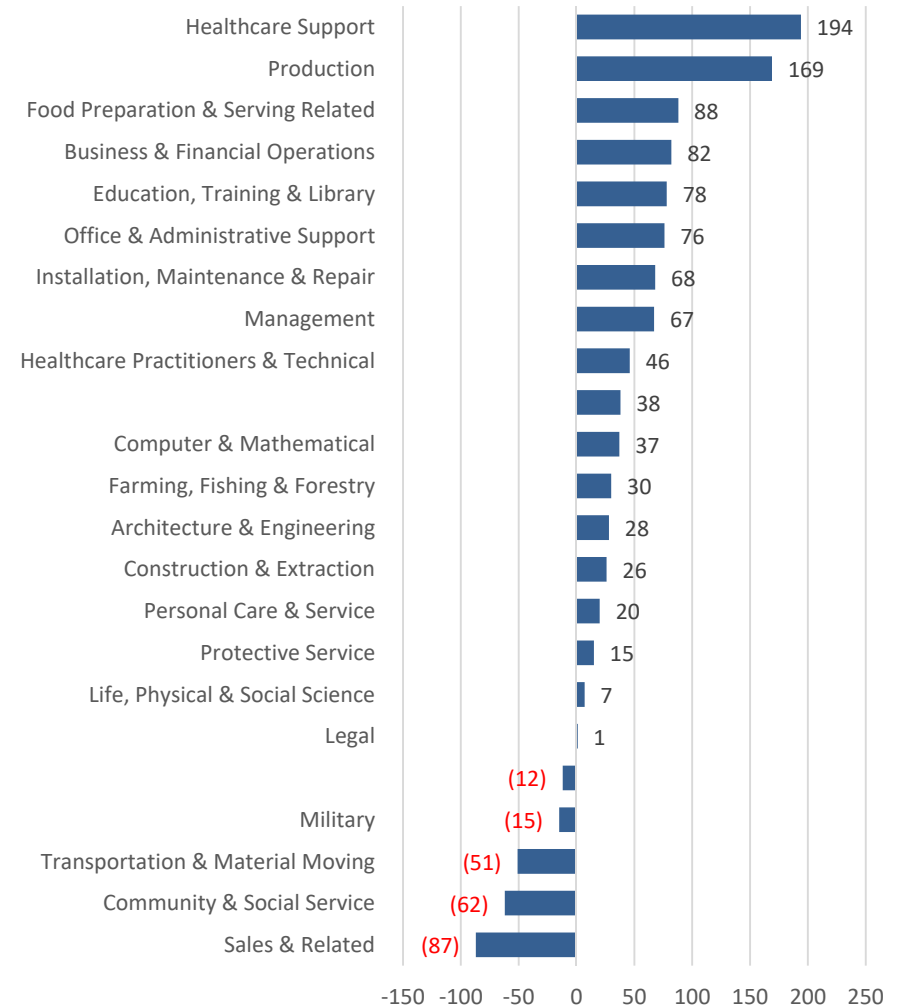
Over the last five years, the top occupations with absolute job gains in Harvey County were in *Healthcare Support*, up 194 jobs or 33.4 percent and *Production*, up 169 jobs or 8.3 percent (Table 7.3, Figure 7.3). The greatest job losses were in the occupational areas of *Sales* (-87 jobs/6 percent) and *Community & Social Service* (-62 jobs/14 percent).

Table 7.3
Employment Change by Major Occupational Groups
Ranked by Absolute Change

Occupations	2016 Jobs	2011–16 Change	Percent Change
Healthcare Support	775	194	33.4%
Production	2,216	169	8.3%
Food Preparation & Serving Related	1,135	88	8.4%
Business & Financial Operations	540	82	17.9%
Education, Training & Library	1,086	78	7.7%
Office & Administrative Support	2,407	76	3.3%
Installation, Maintenance & Repair	678	68	11.1%
Management	814	67	9.0%
Healthcare Practitioners & Technical	961	46	5.0%
Building & Grounds Cleaning, Maintenance	430	38	9.7%
Computer & Mathematical	195	37	23.4%
Farming, Fishing & Forestry	101	30	42.3%
Architecture & Engineering	178	28	18.7%
Construction & Extraction	903	26	3.0%
Personal Care & Service	699	20	2.9%
Protective Service	293	15	5.4%
Life, Physical & Social Science	52	7	15.6%
Legal	57	1	1.8%
Arts, Design, Entertainment, Sports & Media	197	-12	-6%
Military	136	-15	-10%
Transportation & Material Moving	803	-51	-6%
Community & Social Service	396	-62	-14%
Sales & Related	1,381	-87	-6%
All Occupations Total/Average	16,434	842	5.4%

Source: EMSI, Garner Economics

Figure 7.3
2010–2015 Employment Change by Major Occupational Groups



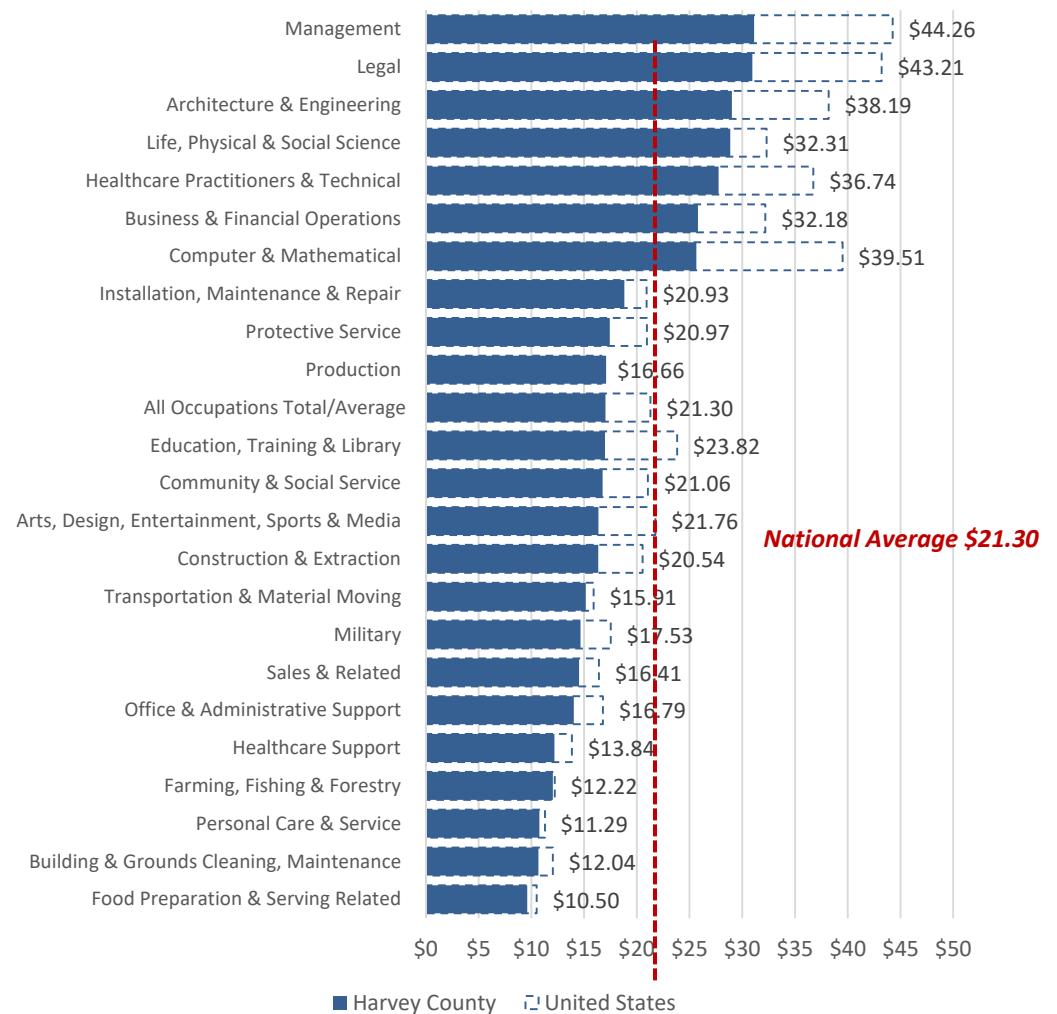
Source: EMSI, Garner Economics

Occupational Earnings

A comparison of the same-occupation median hourly earnings for Harvey County to the national median wage revealed only one occupation that was higher than the national median: *Production*, which was 2.5% higher (Table 7.4, Figure 7.4).

The median wage for all occupations in Harvey County was \$17.03 compared to \$19.00 for the Kansas median wage and \$21.30 for the national median. Harvey County's median wage is 11.6 percent lower than Kansas and 25 percent lower than the United States.

Figure 7.4
2016 Median Hourly Occupational Earnings Comparison



Source: EMSI, Garner Economics

Table 7.4
2016 Median Hourly Occupational Earnings Comparison
Wages Above the National Median highlighted in **Green**

	2016 Jobs	Harvey County	United States	Percent Difference	Kansas	Percent Difference
Management	814	\$31.12	\$44.26	-42.2%	\$34.62	-11.2%
Legal	57	\$30.95	\$43.21	-39.6%	\$34.97	-13.0%
Architecture & Engineering	178	\$29.02	\$38.19	-31.6%	\$33.59	-15.8%
Life, Physical & Social Science	52	\$28.87	\$32.31	-11.9%	\$29.50	-2.2%
Healthcare Practitioners & Technical	961	\$27.75	\$36.74	-32.4%	\$32.10	-15.7%
Business & Financial Operations	540	\$25.80	\$32.18	-24.7%	\$28.72	-11.3%
Computer & Mathematical	195	\$25.64	\$39.51	-54.1%	\$33.32	-30.0%
Installation, Maintenance & Repair	678	\$18.82	\$20.93	-11.2%	\$20.08	-6.7%
Protective Service	293	\$17.45	\$20.97	-20.2%	\$17.81	-2.1%
Production	2,216	\$17.09	\$16.66	2.5%	\$17.38	-1.7%
Education, Training & Library	1,086	\$16.98	\$23.82	-40.3%	\$19.38	-14.1%
Community & Social Service	396	\$16.76	\$21.06	-25.6%	\$18.49	-10.3%
Arts, Design, Entertainment, Sports & Media	197	\$16.37	\$21.76	-33.0%	\$17.75	-8.4%
Construction & Extraction	903	\$16.34	\$20.54	-25.7%	\$18.92	-15.8%
Transportation & Material Moving	803	\$15.16	\$15.91	-5.0%	\$15.81	-4.3%
Military	136	\$14.66	\$17.53	-19.6%	\$15.87	-8.3%
Sales & Related	1,381	\$14.53	\$16.41	-12.9%	\$15.78	-8.6%
Office & Administrative Support	2,407	\$14.03	\$16.79	-19.7%	\$15.51	-10.5%
Healthcare Support	775	\$12.19	\$13.84	-13.5%	\$12.66	-3.8%
Farming, Fishing & Forestry	101	\$12.04	\$12.22	-1.5%	\$12.89	-7.1%
Personal Care & Service	699	\$10.76	\$11.29	-4.9%	\$10.84	-0.7%
Building & Grounds Cleaning, Maintenance	430	\$10.67	\$12.04	-12.8%	\$11.29	-5.8%
Food Preparation & Serving Related	1,135	\$9.62	\$10.50	-9.2%	\$9.85	-2.4%
All Occupations Total/Average	16,434	\$17.03	\$21.30	-25.0%	\$19.00	-11.6%

Source: EMSI; Garner Economics



The following assessment tools include a series of bubble/scatter charts and tables. Axis and quadrant labels should be read as only general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart and table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

Chart axis definitions:

- **Specialization:** Measured using location quotient (LQ).³ Reflects the level of relative concentration of a particular occupation/industry to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry nationwide. For example, if hospital employment grew by five percent nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

- **At-Risk:** Locally specialized and recent local job losses.
- **Declining:** Not locally specialized and recent local job losses.
- **Competitive:** Locally specialized and recent local job gains.
- **Emerging:** Not locally specialized and recent local job gains.
- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

Detailed occupational and industry information can be found in Appendices 2 and 3, respectively.

3. To measure local specialization, location quotients (LQs) for each occupation or industry are derived. LQs are ratios of an area's distribution of employment for a specific occupation/industry compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors, there exists interconnectedness among suppliers, occupations, and associated supporting institutions.

Observations: There are four industry sectors with a level of local specialization above 1.0 that grew within the last five years, comprising sectors in the *Competitive* category:

- *Manufacturing*
- *Health Care & Social Assistance*
- *Crop & Animal Production*
- *Educational Services*

There are eight industry sectors in Harvey County with a level of local specialization below 1.0, however; due to job growth, these industry sectors are classified as *Emerging*.

The *Construction* sector has a local specialization over 1; however, due to recent job losses, it is categorized *At-Risk*.

There are six industries *Declining* due to low local specialization and job loss. (Table 7.5, Figure 7.5).

The *Utilities* sector had data that was not disclosed and, along with a low local specialization and small employment, was not included in this chapter.

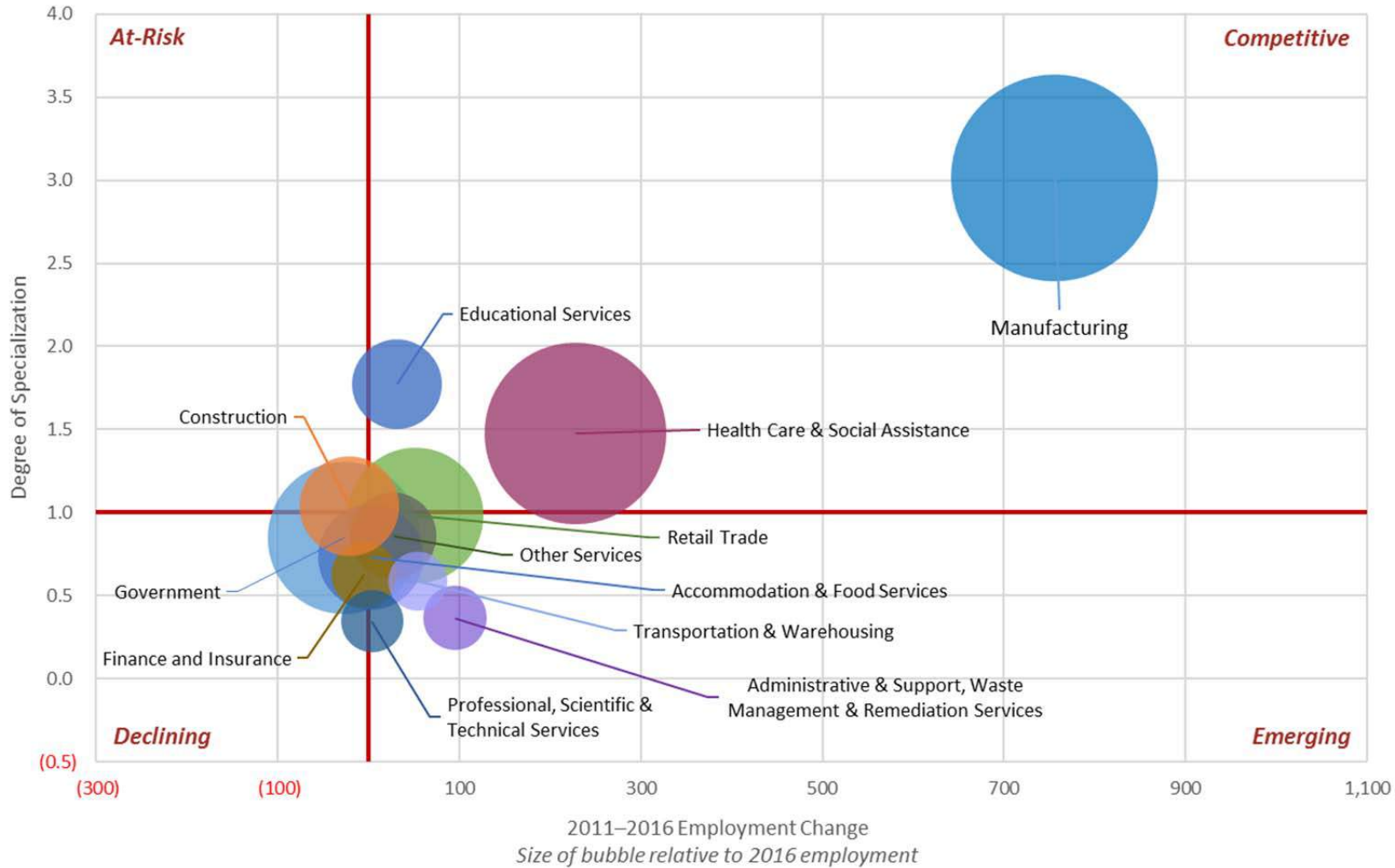
Table 7.5
Industry Specialization & Growth

Industry	2011–2016 Employment Change	2016 Location Quotient	2016 Jobs
Competitive			
Manufacturing	756	3.01	3,942
Health Care & Social Assistance	228	1.48	3,035
Crop and Animal Production	81	1.19	241
Educational Services	31	1.77	742
Emerging			
Administrative & Support, Waste Management & Remediation Services	95	0.37	375
Transportation & Warehousing	54	0.59	328
Retail Trade	52	0.98	1,682
Other Services	27	0.86	680
Mining, Quarrying, Oil & Gas Extraction	9	0.41	30
Professional, Scientific & Technical Services	4	0.34	361
Management of Companies & Enterprises	4	0.17	40
Accommodation & Food Services	2	0.73	1,023
At-Risk			
Construction	(21)	1.04	916
Declining			
Finance & Insurance	(5)	0.63	400
Information	(11)	0.14	44
Arts, Entertainment & Recreation	(22)	0.32	88
Wholesale Trade	(26)	0.37	232
Government	(27)	0.85	2,141
Real Estate & Rental & Leasing	(29)	0.44	119

Source: EMSI, Garner Economics



Figure 7.5
Industry Specialization & Growth
Industries with 2016 Employment of Approximately 300 and Above



Source: EMSI, Garner Economics

Major Industry Competitiveness

The Competitiveness screen seeks to reveal local competitive advantages (i.e., unique growth beyond predicted industry trends).

Observations:

- By this measure, *Administrative, Support, Waste Management & Remediation Services* and *Transportation & Warehousing* are the strongest with both local and national growth.
- Other industries with local competitive effect are *Manufacturing; Crop and Animal Production; Other Services*; and *Mining, Quarrying, Oil & Gas Extraction* (Table 7.6, Figure 7.6).
- Overall, Harvey County demonstrated a positive local competitive effect in 6 of the 18 major industry groups.
- The County's least competitive sectors are *Information, Wholesale Trade, Finance and Insurance, Retail Trade*, and *Government*.

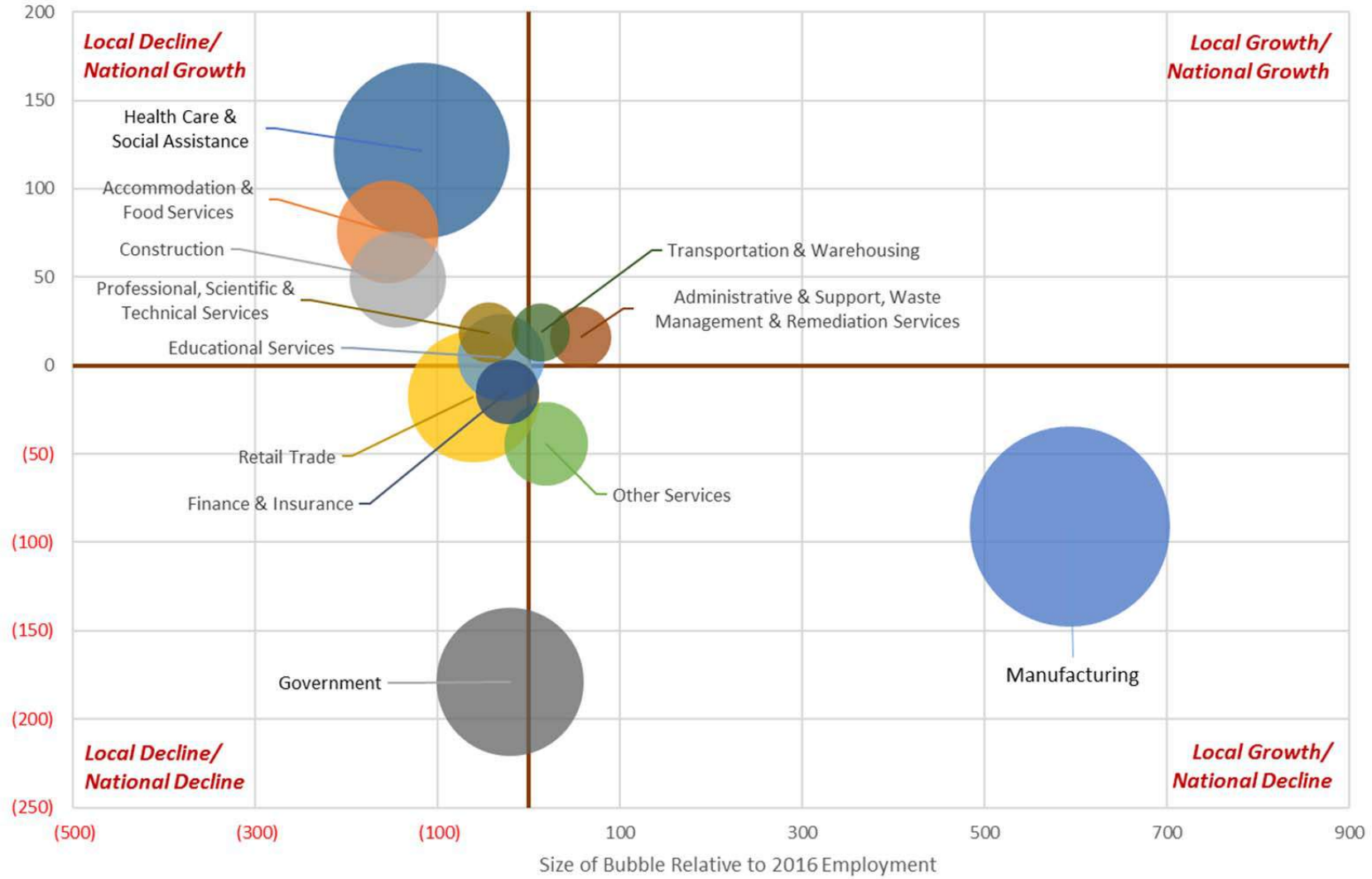
Table 7.6
Industry Relative Components of Growth, 2011–2016

Industry Sector	Local Competitive Effect	Industry Effect	2016 Jobs
Local Growth/National Growth			
Administrative, Support, Waste Management & Remediation Services	57	16	375
Transportation & Warehousing	14	19	328
Local Growth/National Decline			
Manufacturing	593	(91)	3,942
Crop & Animal Production	74	(5)	241
Other Services	19	(44)	680
Mining, Quarrying, Oil & Gas Extraction	10	(3)	30
Local Decline/National Growth			
Health Care & Social Assistance	(117)	121	3,035
Accommodation & Food Services	(154)	76	1,023
Construction	(144)	49	916
Professional, Scientific & Technical Services	(43)	19	361
Arts, Entertainment & Recreation	(37)	6	88
Educational Services	(30)	4	742
Management of Companies & Enterprises	(1)	3	40
Real Estate, Rental & Leasing	(42)	1	119
Local Decline/National Decline			
Information	(14)	(2)	44
Wholesale Trade	(39)	(6)	232
Finance & Insurance	(23)	(15)	400
Retail Trade	(60)	(18)	1,682
Government	(20)	(179)	2,141

Source: EMSI, Garner Economics



Figure 7.6
2011–2016 Industry Relative Components of Growth
Sectors with 2016 Employment over 300



Source: EMSI, Garner Economics

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors.

Observations: Six occupational groups are *Competitive*:

- *Production*
- *Healthcare Support*
- *Community & Social Service*
- *Construction & Extraction*
- *Installation, Maintenance & Repair*
- *Healthcare Practitioners & Technical*

Production occupations have increased more than 330 workers (Table 7.7, Figure 7.7) and is the biggest employment section in Harvey County.

The majority of occupational groups (12) are classified as *Emerging* (having job growth with local specialization under 1).

Two occupational groups are *At-Risk* with location quotients over 1 but have experienced job loss in the last 5 years: *Education, Training & Library* (-104 jobs)/1.16 LQ) and *Personal Care & Services* (-51 jobs)/1.05 LQ).

Additionally, 3 occupation groups are *Declining* with job loss and low local specialization: *Food Preparation & Serving* (-8 jobs); *Arts, Design, Entertainment, Sports & Media* (-2 jobs); and *Military* (-11 jobs).

Table 7.7

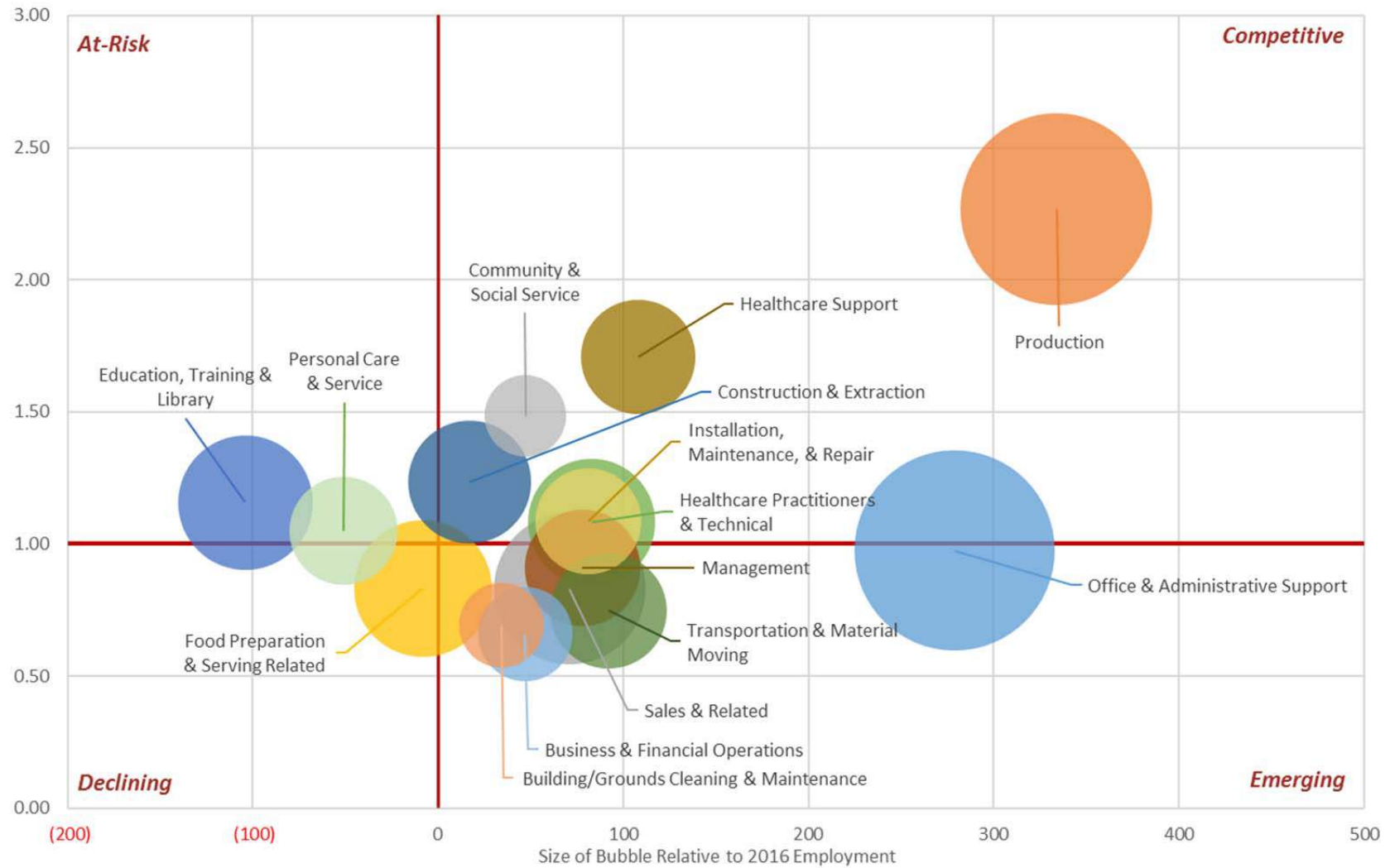
Occupational Specialization and Growth, 2011–2016

Occupations	2011–2016 Change	2016 Location Quotient	2016 Jobs
Competitive			
Production	334	2.27	2,216
Healthcare Support	108	1.71	775
Community & Social Service	47	1.48	396
Construction & Extraction	17	1.23	903
Installation, Maintenance & Repair	81	1.09	678
Healthcare Practitioners & Technical	83	1.08	961
Emerging			
Office & Administrative Support	279	0.97	2,407
Management	78	0.91	814
Sales & Related	71	0.83	1,381
Farming, Fishing & Forestry	27	0.80	101
Protective Service	14	0.80	293
Transportation & Material Moving	92	0.75	803
Building/Grounds Cleaning & Maintenance	34	0.69	430
Business & Financial Operations	47	0.66	540
Architecture & Engineering	35	0.66	178
Computer & Mathematical	34	0.43	195
Legal	0	0.42	57
Life, Physical & Social Science	7	0.39	52
At-Risk			
Education, Training & Library	(104)	1.16	1,086
Personal Care & Service	(51)	1.05	699
Declining			
Food Preparation & Serving Related	(8)	0.83	1,135
Arts, Design, Entertainment, Sports & Media	(2)	0.67	197
Military	(11)	0.66	136

Source: EMSI, Garner Economics



Figure 7.7
Occupational Specialization & Growth
Occupational Groups with 2016 Employment of Approximately 300 and Above



Source: EMSI, Garner Economics

CHAPTER 8: OPTIMAL TARGETS FOR HARVEY COUNTY

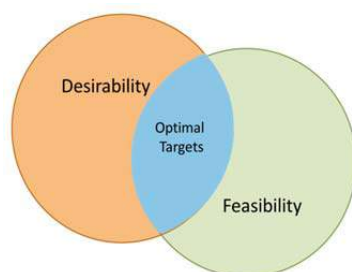


The optimal business sectors selection is based on the specific characteristics of the economy of Harvey County. These recommended targets are designed to assist economic development groups in the region to prioritize resources by focusing on industry sectors for which the region holds competitive advantages and/or has significant growth potential. This approach will help policymakers prioritize the region's community and economic development strategy.

Garner Economics uses a *desirability* and *feasibility* screening matrix to determine the optimal targets. Desirability begins with considering the types of business sectors the community would like to see in the County (Figure 8.1). Feasibility includes what the area can reasonably achieve in the short- to mid-term, based on current or planned locational assets and in conducting an analytical review of the regional economy.

Using results from the analysis and data compilation in Chapters 1–7, four core business and industry groups were chosen that best match Harvey County's unique competitive advantages to the needs of particular industry sectors. These targets are as follows:

FIGURE 8.1: OPTIMAL TARGET SCREENING PROCESS




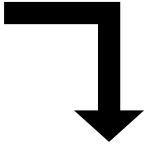


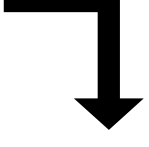


1. *Agribusiness & Agricultural Manufacturing* (includes related target of *Food & Beverage Processing*)
2. *Industrial Products Manufacturing*
3. *Transportation, Distribution & Wholesale* (includes related industry of *Aviation & Avionics*)
4. *Health Services*

In addition to these primary targets, a fifth “local target” is presented for the County: *Entrepreneurial, Hospitality & Retail Development*. This target is aimed at addressing a key finding from the stakeholder input process: the County's limited offerings of retail, dining, and entertainment options hinder its ability to attract and retain businesses and young workers. The local target is treated differently from the core targets, as its activities will not fall directly within the purview of the HCEDC; instead, these efforts should be led by local organizations with complementary missions (e.g., CVB, Chamber of Commerce, academic institutions, municipalities).

For all targeted business sectors, the County's competitive advantages are presented, along with national trends and projections of the targets. In some cases, target sectors are actually losing jobs nationally, but the County's particular set of economic development assets put it in position to capture demand. Under each target, a list of individual subsectors is provided with accompanying NAICS classifications. A full description for each subsector target can be found in Table 8.18.

For each target, a bulleted list of rationales is presented and identified as appealing to the needs of prospects (P) or the community (C). This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

FIGURE 8.2: OPTIMAL TARGETS FOR HARVEY COUNTY

CORE TARGET INDUSTRY GROUPS						LOCAL TARGET*
Agribusiness & Agricultural Manufacturing		Industrial Products Manufacturing	Transportation, Distribution & Wholesale		Health Services	Entrepreneurial, Hospitality & Retail Development
 <ul style="list-style-type: none"> • Vegetable & Melon Farming • Cotton Farming • Turkey Production • Horses & Other Equine Production • Nonwoven Fabric Mills • Fertilizer Mfg. • Pesticide & Ag. Chemicals Mfg. • Farm Machinery & Equipment Mfg. 	 <p>Related Target: Food & Beverage Processing</p> <ul style="list-style-type: none"> • Flour Milling & Malt Mfg. • Frozen Food Mfg. • Fruit & Vegetable Canning, Pickling & Drying • Poultry Processing • Breweries • Distilleries 	 <ul style="list-style-type: none"> • Rubber Product Mfg. • Cement & Concrete Products Mfg. • Architectural & Structural Metals Mfg. • Machine Shops • Other Fabricated Metal Mfg. • Material Handling Equipment Mfg. • General Purpose Machinery Mfg. • Wood Kitchen Cabinet & Countertop Mfg. • Institutional Furniture Mfg. 	 <ul style="list-style-type: none"> • Grain & Field Bean Merchant Wholesale • Petroleum Bulk Stations & Terminals • Farm Supplies Merchant Wholesale • Wholesale Trade Agents & Brokers • Rail Transportation • Pipeline Transport. of Natural Gas • Freight Transport. Arrangement • Refrigerated Warehousing & Storage • Farm Product Warehousing & Storage 	 <p>Related Target: Aviation & Avionics</p> <ul style="list-style-type: none"> • Navigation & Aeronautical System Mfg. • Aircraft Mfg. (Drones) • Aircraft Engine and Parts Mfg. • Other Aircraft Parts and Auxiliary Equipment Mfg. • Support Activities for Air Transport. 	 <ul style="list-style-type: none"> • Offices of Physicians, Dentists & Other Health Practitioners • Health Services Educational Institutions • Outpatient Care Centers • Medical and Diagnostic Laboratories • Home Health Care Services • Nursing and Residential Care Facilities 	 <ul style="list-style-type: none"> • Co-Working and Remote Office Centers • Traveler Accommodations • Restaurants & Other Eating/ Drinking Places • Specialty Food Stores • High-End Boutique Retail • Stationery and Gift Stores • Miscellaneous Store Retailers

*The local target includes initiatives that do not necessarily fall within the purview of the HCEDC, but instead should be pursued by local organizations with missions that complement the targets (e.g., CVB, Chamber of Commerce, academic institutions, municipalities).

TARGET 1: AGRIBUSINESS & AGRICULTURAL MANUFACTURING



Harvey County has a long history and strong base of farming and agricultural operations. According to the U.S. Census of Agriculture, the total market value of the County's agricultural products sold in 2012 was \$162 million, and Harvey ranks among

the top 10 counties in Kansas in terms of the value of agricultural sales for several commodity groups, including cotton, vegetables, poultry, and horses. This target can both add value to the economy and allow the County to tap into opportunities for *Food & Beverage Processing* (see Related Target below).

There are two key reasons for Harvey County to focus on this target. First, the agriculture sector already supports a significant amount of local economic activity, so this existing base must be protected. Second, the County will be unable to build a successful manufacturing industry geared towards supporting agribusiness if it cannot sustain the production of inputs for those businesses. For the *Agribusiness* portion of the target, efforts should therefore focus on retention and on creating value-add opportunities. While the *Agricultural Manufacturing* component of this target already has an existing local base with major industries, particularly AGCO, it will also need additional emphasis on business attraction.

Rationales

- Existing base of agricultural operations (P)
- Availability of agricultural products for food processing (P)
- Access to interstate highway and rail system (P)
- General aviation airport capable of handling corporate aircraft (P)
- Availability of skilled production workers (P)
- Reasonable availability of managerial personnel (P)
- Low cost of labor (P)
- Quality of labor-management relations (P)
- Low rate of unionization in local labor force (P)
- Reasonable availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college(s) (P)
- Availability of regional engineering program/degree (P)
- Availability of manufacturing processes (P)
- Availability and cost of water and sewer infrastructure (P)
- Availability of fully served and marketable industrial sites (P)
- Availability of low-interest loans for small businesses (P)
- Availability of labor training incentives (P)
- Potential to add value to local base of agricultural activity (C)
- Potential to diversify regional manufacturing sector (C)
- Average target subsector national earnings of \$37,407 (P)
- Average target subsector 10-year forecast employment growth rate of 0.8%, compared with past 10-year decline of 3.9%
- An existing local pool of high-demand occupations (Table 8.3) (P)
- Quality of place assets: availability of moderate-cost housing, low cost of living, low crime rate, availability of medical facilities, attractive appearance of communities (P)



Table 8.1
Agribusiness & Agricultural Manufacturing Subsectors

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
111	Crop Production	\$32,522	-0.8%	1.0%	0.85
112	Animal Production & Aquaculture	\$35,595	-10.1%	-1.6%	0.44
31323	Nonwoven Fabric Mills	\$67,554	-7.1%	11.1%	0.01
32531	Fertilizer Manufacturing	\$100,778	-0.8%	10.1%	0.02
32532	Pesticide & Other Agricultural Chemicals Manufacturing	\$111,640	-14.2%	1.5%	0.01
333111	Farm Machinery & Equipment Manufacturing	\$71,733	4.6%	9.3%	0.06
	WEIGHTED AVERAGES/TOTALS	\$37,407	-3.9%	0.8%	1.39

Source: EMSI, Garner Economics

RELATED TARGET: FOOD & BEVERAGE PROCESSING



This target group is aimed specifically at adding value to the agricultural products that are cultivated and raised in Harvey County and the surrounding region. The key inputs for processing are three of the leading commodity groups in the region: wheat, vegetables, and turkeys. In addition, the proximity to major grain harvesting and milling operations makes Harvey County a potential location for specialty and craft breweries and distilleries. These business types are both poised for major national growth over the next decade.

At present, the specific subsectors that fall under this target are scarcely represented in Harvey County, with fewer than 100 full-time jobs reported in these industries by the Bureau of Labor Statistics. For this reason, *Food & Beverage Processing* cannot justifiably be presented as a true industry target for HCEDC. In order to develop this target, the region will need to mount a coordinated effort that involves agribusiness leaders, K-12 and post-secondary educational institutions, and owners of potential industrial sites. This will necessarily be a long-term effort.

The rationales for this related target are combined with Target 1, so they are not presented separately.

Table 8.2

Food & Beverage Processing Subsectors

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
31121	Flour Milling & Malt Manufacturing	\$77,946	10.1%	12.2%	0.02
31141	Frozen Food Manufacturing	\$53,838	2.5%	5.6%	0.09
31142	Fruit & Vegetable Canning, Pickling & Drying	\$62,613	-5.3%	3.8%	0.08
311615	Poultry Processing	\$39,768	-4.5%	1.0%	0.23
31212	Breweries	\$111,640	-14.2%	1.5%	0.01
31214	Distilleries	\$75,311	106.7%	39.9%	0.05
WEIGHTED AVERAGES/TOTALS		\$53,718	3.0%	7.1%	0.49

Source: EMSI, Garner Economics



Table 8.3

*Agribusiness & Agricultural Manufacturing and Food & Beverage Processing:
Harvey County Labor Shed* Existing Pool of High-Demand Occupations–2016*

Occupation	Employed in Labor Shed
Laborers and Material Movers, Hand	5,328
General and Operations Managers	4,122
Team Assemblers	3,367
Inspectors, Testers, Sorters, Samplers, and Weighers	2,354
First-Line Supervisors of Production and Operating Workers	1,973
Machinists	1,725
Welders, Cutters, Solderers, and Brazers	1,548
Food Processing Workers	1,400
Machine Tool Cutting Setters, Operators, and Tenders, Metal and Plastic	1,289
Assemblers and Fabricators, All Other	1,144
Industrial Truck and Tractor Operators	988
Farmers, Ranchers, and Other Agricultural Managers	925
Industrial Engineers, Including Health and Safety	897
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	635
Layout Workers, Metal and Plastic	605
Industrial Production Managers	513
Woodworking Machine Setters, Operators, and Tenders	417
Agricultural Equipment Operators	193

**Labor shed is defined as 45-minute drive time from the center of Newton.*

Source: EMSI, Garner Economics



Table 8.4
Degree Completions in Region in Majors Related to Agribusiness & Agricultural Manufacturing
and Food & Beverage Processing, 2014–15 Academic Year*

Major	Certificate	Associate	Bachelor	Graduate
Agriculture	6	6	0	0
Business, Accounting & Finance	3	23	390	65
Engineering	0	0	261	323
Engineering Technologies	8	32	0	0
Mathematics & Statistics	0	0	7	5
Precision Production	27	7	0	0
Transportation & Materials Moving	0	8	0	0
Total	44	76	658	393

**Wichita State University, Bethel College, Hesston College, and Hutchinson Community College*

Source: National Center for Education Statistics, Garner Economics

TARGET 2: INDUSTRIAL PRODUCTS MANUFACTURING



Manufacturing industries already form the core of Harvey County's economy, as the overall sector represents 24 percent of the existing employment base. The subsectors within this target group are all industries that have an existing presence in Harvey County.

Many of the largest manufacturing operations already located in Harvey County fall under this target, including Full Vision, Bunting Magnetics, Excel Industries, Industrial Metal Fabrication, Legg Company, Martin Machine & Welding, and Southwest & Associates.

Building a target group around these businesses is important for several reasons: there are opportunities for retention and expansion, the County can convey to prospects that the industry is supportable in the local economy, there is already a trained labor force, and there are established manufacturing processes for these products.

Although these businesses fall under a variety of categories, the common thread among all of them is a need for highly trained managers and skilled production workers. The region's colleges and trade schools have excellent training programs for these industries, making labor a strong asset. The presence of developable industrial sites with available infrastructure is also a key asset for this target group.

Rationales

- Well positioned to serve national and international markets (P)
- Access to interstate highway and rail system (P)
- General aviation airport capable of handling corporate aircraft (P)
- Availability of skilled production workers (P)
- Reasonable availability of managerial personnel (P)
- Low cost of labor (P)
- Quality of labor-management relations (P)
- Low rate of unionization in local labor force (P)
- Reasonable availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college (P)
- Availability of local engineering program/degree (P)
- Availability of manufacturing processes (P)
- Availability and cost of water and sewer infrastructure (P)
- Availability of fully served and marketable industrial sites (P)
- Availability of low-interest loans for small businesses (P)
- Availability of labor training incentives (P)
- Potential to diversify regional manufacturing sector (C)
- Average target subsector national earnings of \$65,994 (C)
- Average target subsector 10-year forecast employment growth rate of 7.5%, compared with past 10-year decline of 12.0%
- An existing local pool of high-demand occupations (Table 8.6) (P)
- Quality of place assets: availability of moderate-cost housing, low cost of living, low crime rate, availability of medical facilities, attractive appearance of communities (P)



Table 8.5
Industrial Products Manufacturing Subsectors

NAICS	Description	National Earnings, 2016	2006-2016 National Job Growth	2016-2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
3262	Rubber Product Manufacturing	\$67,069	-16.1%	1.7%	0.13
3273	Cement & Concrete Products Manufacturing	\$67,321	-24.5%	5.0%	0.19
3323	Architectural & Structural Metals Manufacturing	\$62,542	-10.5%	9.3%	0.37
33271	Machine Shops	\$61,858	3.4%	5.9%	0.29
3329	Other Fabricated Metal Manufacturing	\$72,365	-4.2%	9.9%	0.27
33392	Material Handling Equipment Manufacturing	\$74,331	-0.8%	15.4%	0.08
33399	All Other General Purpose Machinery Manufacturing	\$83,394	-6.7%	10.6%	0.14
33711	Wood Kitchen Cabinet & Countertop Manufacturing	\$46,373	-36.2%	2.0%	0.12
337127	Institutional Furniture Manufacturing	\$55,911	-19.3%	4.6%	0.02
	WEIGHTED AVERAGES/TOTALS	\$65,994	-12.0%	7.5%	1.62

Source: EMSI, Garner Economics



Table 8.6

Industrial Products Manufacturing: Harvey County Labor Shed Existing Pool of High-Demand Occupations–2016*

Occupation	Employed in Labor Shed
Team Assemblers	3,367
First-Line Supervisors of Production and Operating Workers	1,973
Machinists	1,725
Welding, Soldering, and Brazing Workers	1,711
Industrial Machinery Mechanics	1,527
Engineering Technicians, Except Drafters	1,432
Machine Tool Cutting Setters, Operators, and Tenders, Metal and Plastic	1,289
Computer Control Programmers and Operators	1,283
Textile, Apparel, and Furnishings Workers	1,257
Assemblers and Fabricators, All Other	1,144
Industrial Engineers	829
Helpers--Production Workers	783
Packaging and Filling Machine Operators and Tenders	735
Crushing, Grinding, Polishing, Mixing, and Blending Workers	688
Tool and Die Makers	644
Layout Workers, Metal and Plastic	605
Industrial Production Managers	513
Electrical, Electronics, and Electromechanical Assemblers	507
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	450
Forming Machine Setters, Operators, and Tenders, Metal and Plastic	420
Woodworking Machine Setters, Operators, and Tenders	417
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	400
Cabinetmakers and Bench Carpenters	189
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	166
Molders, Shapers, and Casters, Except Metal and Plastic	135

**Labor shed is defined as 45-minute drive time from the center of Newton.*

Source: EMSI, Garner Economics



Table 8.7

Degree Completions in Region in Majors Related to Industrial Products Manufacturing, 2014–15 Academic Year*

Major	Certificate	Associate	Bachelor	Graduate
Business, Accounting & Finance	6	6	0	0
Computer & Information Sciences	4	15	0	0
Engineering	3	23	390	65
Engineering Technologies	0	0	261	323
Mechanic & Repair Technologies	13	5	0	0
Mathematics & Statistics	13	5	0	0
Precision Production	0	0	7	5
Transportation & Materials Moving	27	7	0	0
Total	66	61	658	393

**Wichita State University, Bethel College, Hesston College, and Hutchinson Community College*

Source: National Center for Education Statistics, Garner Economics

TARGET 3: TRANSPORTATION, DISTRIBUTION & WHOLESALE



The economic development history of Harvey County is tied to transportation, particularly along its railroad lines. Rail transportation remains an important component of the County's economy—the BNSF and Union Pacific and a local short line traverse the County and several local businesses are geared toward supporting these lines.

The modern transportation and distribution industry is geared toward the Interstate Highway system. Harvey County is served by I-135, which connects to primary east-west (I-70) and north-south (I-35) corridors. The establishment of the Kansas Logistics Park in Newtown was undertaken specifically to capitalize on its central location and access to I-35.

In practice, the County's location is actually not ideal for major operators in this field. Major distribution facilities typically select locations that are near major urban centers and directly along primary corridors. Newton's proximity to a mid-sized city in Wichita and location on a connector highway in I-135 puts it at a competitive disadvantage to many other locations for distribution centers.

While major distribution centers may not be feasible in Harvey County, there are opportunities to target a variety of industries that fall under the Wholesale Trade sector. Since these businesses are more influenced by proximity to product inputs, the presence of major manufacturing and agribusiness operations is a plus for Harvey County. Another potential transportation-related target is the *Aviation* industry (see Related target).

Rationales

- Central location for regional and national markets (P)
- Access to interstate highway and rail system (P)
- Proximity to established transportation industries in Wichita (P)
- General aviation airport capable of handling corporate aircraft (P)
- Reasonable availability of support workers (P)
- Reasonable availability of managerial personnel (P)
- Low cost of labor (P)
- Quality of labor-management relations (P)
- Low rate of unionization in local labor force (P)
- Reasonable availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college (P)
- Availability of local engineering program/degree (P)
- Presence of Kansas Logistics Park (P)
- Availability and cost of water and sewer infrastructure (P)
- Availability of fully served and marketable industrial sites (P)
- Availability of low-interest loans for small businesses (P)
- Availability of labor training incentives (P)
- Potential to add value to local base of agricultural activity (C)
- Potential to diversify regional manufacturing sector (C)
- Average target subsector national earnings of \$95,292 (C)
- Average target subsector 10-year forecast employment growth rate of 15.2%, consistent with past 10-year growth of 15.0%
- An existing local pool of high-demand occupations (Table 8.10) (P)
- Quality of place assets: availability of moderate-cost housing, low cost of living, low crime rate, availability of medical facilities, attractive appearance of communities (P)



Table 8.8
Transportation, Distribution & Wholesale Subsectors

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
42451	Grain & Field Bean Merchant Wholesalers	\$70,934	10.6%	11.7%	0.05
42471	Petroleum Bulk Stations & Terminals	\$90,880	-0.5%	15.5%	0.03
42491	Farm Supplies Merchant Wholesalers	\$67,448	5.8%	6.5%	0.12
42512	Wholesale Trade Agents & Brokers	\$111,623	19.5%	18.7%	0.88
482	Rail Transportation	\$83,996	5.4%	7.4%	0.25
4862	Pipeline Transportation of Natural Gas	\$145,756	13.8%	13.4%	0.03
4885	Freight Transportation Arrangement	\$70,376	16.8%	14.6%	0.23
49312	Refrigerated Warehousing & Storage	\$55,094	22.1%	16.2%	0.06
49313	Farm Product Warehousing & Storage	\$52,505	15.8%	26.9%	0.01
	WEIGHTED AVERAGES/TOTALS	\$95,292	15.0%	15.2%	1.66

Source: EMSI, Garner Economics

RELATED TARGET: AVIATION & AVIONICS



Harvey County has a great deal of potential related to the *Aviation & Avionics* industry. As with the *Food & Beverage* processing target, though, much work needs to be done in order to develop these industries into a major component of the local economy. The chief

asset is Newton City/County Airport, which has three key advantages over many other general aviation airports: 1) it has a 7,000-foot runway, 2) it has hundreds of acres of developable land, and 3) it is already established as a reliever airport to Wichita by the FAA.

Harvey County also benefits from its proximity to Wichita in another key way: Wichita is one of the largest centers of general aviation aircraft manufacturing in the world, with Cessna, Beechcraft, and Bombardier all having facilities there.

The appeal of Harvey County to this industry has already been proven by the attraction of Park Aerospace, which opened a manufacturing plant in Newtown in 2009 that produces advanced composite aircraft parts. While this facility has proven to be successful, it has not yet led to a major boom for this sector in the County. In order to further develop the *Aviation* industry, HCEDC will need to work proactively with the State of Kansas and higher education providers to ensure that the region's workforce has adequate training to attract additional activity from these sectors. Training should be specifically geared toward skills related to airframe and powerplant (A&P) overhaul and aircraft maintenance. There should also be an emphasis on the manufacturing of drones and unmanned aircraft.

The rationales for this related target are combined with Target 3, so they are not presented separately.

Table 8.9

Aviation & Avionics Subsectors

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$130,653	-21.7%	-13.8%	0.12
336411	Aircraft Manufacturing	\$130,379	5.0%	0.7%	0.23
336412	Aircraft Engine and Engine Parts Manufacturing	\$112,195	-6.3%	-1.8%	0.08
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	\$88,317	18.4%	10.7%	0.11
4881	Support Activities for Air Transportation	\$54,998	22.2%	19.8%	0.20
	WEIGHTED AVERAGES/TOTALS	\$89,431	2.6%	6.3%	0.51

Source: EMSI, Garner Economics



Table 8.10
Transportation, Distribution & Wholesale and Aviation & Avionics:
Harvey County Labor Shed Existing Pool of High-Demand Occupations–2016*

Occupation	Employed in Labor Shed
Laborers and Material Movers, Hand	5,328
Stock Clerks and Order Fillers	4,889
Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	4,059
Heavy and Tractor-Trailer Truck Drivers	3,917
Team Assemblers	3,367
Shipping, Receiving, and Traffic Clerks	2,133
First-Line Supervisors of Production and Operating Workers	1,973
Electrical and Electronic Equipment Mechanics, Installers, and Repairers	1,853
Machinists	1,725
Welding, Soldering, and Brazing Workers	1,711
Production, Planning, and Expediting Clerks	1,668
Industrial Machinery Mechanics	1,527
First-Line Supervisors of Mechanics, Installers, and Repairers	1,287
Assemblers and Fabricators, All Other	1,144
Industrial Truck and Tractor Operators	988
Supervisors of Transportation and Material Moving Workers	883
Industrial Engineers	829
Helpers--Production Workers	783
Industrial Production Managers	513
Electrical, Electronics, and Electromechanical Assemblers	507
Rail Transportation Workers	370
Aircraft Pilots and Flight Engineers	351
Transportation, Storage, and Distribution Managers	222
Air Traffic Controllers & Airfield Operations Specialists	153

**Labor shed is defined as 45-minute drive time from the center of Newton.*

Source: EMSI, Garner Economics

Table 8.11
Degree Completions in Region in Majors Related to Transportation, Distribution & Wholesale
and Aviation & Avionics, 2014–15 Academic Year*

Major	Certificate	Associate	Bachelor	Graduate
Business, Accounting & Finance	6	6	0	0
Computer & Information Sciences	4	15	0	0
Engineering Technologies	0	0	261	323
Mechanic & Repair Technologies	13	5	0	0
Mathematics & Statistics	13	5	0	0
Transportation & Materials Moving	27	7	0	0
Total	63	38	261	323

**Wichita State University, Bethel College, Hesston College, and Hutchinson Community College*

Source: National Center for Education Statistics, Garner Economics

TARGET 4: HEALTH SERVICES



The *Health Services* target already represents a major component of the Harvey County economy. The *Health Care & Social Assistance* sector is the second largest industry sector in the County, with 18% of the current employment base, and this sector added more than 200 jobs from 2011 to 2016. With a growing and aging population in the County, this industry group should continue to grow in the future.

Despite the major presence and growth prospects of this cluster, the primary challenge for Harvey County will be to grow the *Health Care* target beyond its local orientation. The existing *Health Care* industry in the County is geared towards the local market, thus limiting its growth to demand from the area's population.

In order to build continued economic opportunities in this target, Harvey County will need to leverage its key assets in order to attract more doctors, health support services, diagnostic centers, etc. This will necessarily center on building on the presence of Newton Medical Center. Although the hospital is a fairly small, 103-bed facility, it is a modern facility that is nationally noted for several of its services, including maternity, knee & hip replacement, and respiratory care. These distinctions help the hospital attract and retain top talent.

The nearby presence of the University of Kansas School of Medicine's campus in Wichita is also an asset for Harvey County. This program is additionally supported by training programs for nurses and medical support personnel at Hesston College and Hutchinson Community College.

Rationales

- Central location for regional markets (P)
- Availability of health care workers (P)
- General aviation airport capable of handling corporate aircraft (P)
- Reasonable availability of office and admin support workers (P)
- Reasonable availability of managerial personnel (P)
- Low cost of labor (P)
- Quality of labor-management relations (P)
- Reasonable availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college (P)
- Presence of Newton Medical Center (P)
- Proximity to KU School of Medicine Wichita campus (P)
- Older population with high concentrations in oldest age groups (P)
- High concentration of employment and recent growth in *Health Care* sector (P)
- Strong local concentration and recent growth in *Healthcare Support and Healthcare Practitioners & Technical* occupations (P)
- Availability of labor training incentives (P)
- Opportunity to expand medical services in local area (C)
- Average target subsector national earnings of \$61,292 (P)
- Average target subsector 10-year forecast employment growth rate of 20.9%, building on past 10-year growth rate of 24.0%
- An existing local pool of high-demand occupations (Table 8.2) (P)
- Quality of place assets: availability of moderate-cost housing, low cost of living, low crime rate, availability of medical facilities, attractive appearance of communities (P)

Table 8.12
Health Services Subsectors

NAICS	Description	National Earnings, 2016	2006-2016 National Job Growth	2016-2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
611519	Other Technical and Trade Schools	\$54,970	11.3%	8.0%	0.12
621111	Offices of Physicians, Dentists, and Other Health Practitioners	\$104,613	16.3%	14.8%	2.52
6214	Outpatient Care Centers	\$71,887	61.7%	36.9%	0.84
6215	Medical and Diagnostic Laboratories	\$71,730	26.9%	23.7%	0.28
6216	Home Health Care Services	\$34,464	51.5%	36.3%	1.41
623	Nursing and Residential Care Facilities	\$36,505	14.5%	15.3%	3.32
	WEIGHTED AVERAGES/TOTALS	\$61,292	24.0%	20.9%	8.48

Source: EMSI, Garner Economics



Table 8.13

Health Services: Harvey County Labor Shed Existing Labor Pool of High-Demand Occupations–2016*

Occupation	Employed in Labor Shed
Health Technologists and Technicians	6,855
Registered Nurses	6,648
Nursing Assistants	4,741
Miscellaneous Healthcare Support Occupations	3,514
Licensed Practical and Licensed Vocational Nurses	1,724
Health Practitioner Support Technologists and Technicians	1,650
Physicians and Surgeons	1,260
Therapists	1,155
Home Health Aides	1,058
Medical and Health Services Managers	778
Medical Records and Health Information Technicians	610

**Labor shed is defined as 45-minute drive time from the center of Newton.*

Source: EMSI, Garner Economics



Table 8.14

Degree Completions in Region in Majors Related to Health Services, 2014–2015 Academic Year*

Major	Certificate	Associate	Bachelor	Graduate
Biological & Biomedical Sciences	0	0	69	8
Health Professions	80	259	336	178
Physical Sciences	0	0	49	5
Psychology	8	0	78	28
Total	88	259	532	219

**Wichita State University, Bethel College, Hesston College, and Hutchinson Community College. Does not include University of Kansas School of Medicine Wichita campus, as graduation figures for this institution are not reported by campus.*

Source: National Center for Education Statistics, Garner Economics

LOCAL TARGET: ENTREPRENEURIAL, HOSPITALITY & RETAIL DEVELOPMENT



One of the key obstacles to economic growth and prosperity identified in the *Competitive Realities Report* is Harvey County's limited inventory of quality of place assets. The lack of attractive options for shopping, dining, lodging, and entertainment puts the County at a

disadvantage relative to similar communities that may have superior amenities. These factors have become more important to companies when making locational decisions and are also closely related to the ability to attract and retain quality labor, particularly younger workers.

At present, Harvey County's inventory of lodging is limited to a small number of limited-service properties of varied age and quality along I-35 in Newton and Hesston. The County also lacks quality and diversity in its dining and entertainment options. The absence of these amenities makes it more difficult for HCEDC to market the County, as corporate decision-makers expect to have access to these types of businesses.

The development of these quality of place amenities necessary for effective economic development is not intended to be a priority for HCEDC. Rather, this group is treated as a "local target" that should be pursued by local organizations with missions that complement the targets, like the CVB, Chamber of Commerce, and academic institutions, and municipalities. (See recommendations related to this target in Chapter 9.)

Rationales

- Central location for regional markets (P)
- Access to interstate highway (P)
- Opportunity to improve the character of historic areas in Newton and Hesston (C)
- Opportunity to capture demand from County residents for goods & services currently lost to Wichita (C)
- Reasonable availability of managerial personnel (P)
- Low cost of labor (P)
- Quality of labor-management relations (P)
- Reasonable availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college (P)
- Availability of low-interest loans for small businesses (P)
- Availability of labor training incentives (P)
- Potential to improve attractiveness of Harvey County to corporate decision-makers (C)
- Opportunity to attract/retain workers who presently out-commute (C)
- Opportunity to create entrepreneurship opportunities for residents (C)
- Average target subsector national earnings of \$23,619 (P)
- Average target subsector 10-year forecast employment growth rate of 10.8%, and past 10-year growth of 13.6%
- An existing local pool of high-demand occupations (Table 8.16) (P)
- Quality of place assets: availability of moderate-cost housing, low cost of living, low crime rate, availability of medical facilities (P)

Table 8.15

Entrepreneurial, Hospitality & Retail Development Subsectors

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
4452	Specialty Food Stores	\$29,494	-1.9%	7.5%	0.25
4481	Clothing Stores	\$23,741	-9.3%	-1.9%	1.04
45322	Gift, Novelty, and Souvenir Stores	\$22,668	-25.2%	-15.6%	0.17
45399	Other Miscellaneous Store Retailers	\$34,420	6.4%	11.8%	0.22
53112	Lessors of Nonresidential Buildings (except Miniwarehouses)	\$72,191	2.2%	3.7%	0.20
7211	Traveler Accommodation	\$34,920	4.8%	7.8%	1.87
7224	Drinking Places	\$20,118	4.5%	6.3%	0.39
7225	Restaurants and Other Eating Places	\$20,364	20.9%	13.4%	10.25
	WEIGHTED AVERAGES/TOTALS	\$23,619	13.6%	10.8%	14.39

Source: EMSI, Garner Economics

Table 8.16

Entrepreneurial, Hospitality & Retail Development: Harvey County Labor Shed Existing Labor Pool of High-Demand Occupations–2016*

Occupation	Employed in Labor Shed
Retail Salespersons	10,487
Cashiers	7,846
Waiters and Waitresses	6,080
Combined Food Preparation and Serving Workers, Including Fast Food	5,319
First-Line Supervisors of Retail Sales Workers	3,499
Cooks, Restaurant	2,869
Maids and Housekeeping Cleaners	2,809
First-Line Supervisors of Food Preparation and Serving Workers	2,755
Food Preparation Workers	2,461
Dining Room and Cafeteria Attendants and Bartender Helpers	1,097
Dishwashers	955
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	949
Bartenders	788
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	694
Food Service Managers	594
Property, Real Estate, and Community Association Managers	553
Hotel, Motel, and Resort Desk Clerks	525
First-Line Supervisors of Housekeeping and Janitorial Workers	396
Amusement and Recreation Attendants	378
Chefs and Head Cooks	287
Lodging Managers	42

**Labor shed is defined as 45-minute drive time from the center of Newton.*

Source: EMSI, Garner Economics

Table 8.17

Degree Completions in Region in Majors Related to Entrepreneurial, Hospitality & Retail Development, 2014–15 Academic Year*

Major	Certificate	Associate	Bachelor	Graduate
Business, Accounting & Finance	3	23	390	65
Liberal Arts	0	572	292	145
Visual & Performing Arts	1	3	74	19
Total	4	598	756	229

**Wichita State University, Bethel College, Hesston College, and Hutchinson Community College*

Source: National Center for Education Statistics, Garner Economics

Table 8.18
Target Subsector Descriptions

TARGET 1: AGRIBUSINESS & AGRICULTURAL MANUFACTURING	
NAICS 111	Crop Production
Industries in the Crop Production subsector grow crops mainly for food and fiber. The subsector comprises establishments, such as farms, orchards, groves, greenhouses, and nurseries, primarily engaged in growing crops, plants, vines, or trees and their seeds.	
NAICS 112	Animal Production & Aquaculture
Industries in the Animal Production and Aquaculture subsector raise or fatten animals for the sale of animals or animal products. The subsector includes establishments, such as ranches, farms, and feedlots, primarily engaged in keeping, grazing, breeding, or feeding animals. These animals are kept for the products they produce or for eventual sale.	
NAICS 31323	Nonwoven Fabric Mills
This industry comprises establishments primarily engaged in manufacturing nonwoven fabrics and felts. Processes used include bonding and/or interlocking fibers by mechanical, chemical, thermal, or solvent means, or by combinations thereof.	
NAICS 32531	Fertilizer Manufacturing
This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing nitrogenous or phosphatic fertilizer materials; (2) manufacturing fertilizers from sewage or animal waste; (3) manufacturing nitrogenous or phosphatic materials and mixing with other ingredients into fertilizers; and (4) mixing ingredients made elsewhere into fertilizers.	
NAICS 32532	Pesticide & Other Agricultural Chemicals Manufacturing
This industry comprises establishments primarily engaged in the formulation and preparation of agricultural and household pest control chemicals (except fertilizers).	
NAICS 333111	Farm Machinery & Equipment Manufacturing
This U.S. industry comprises establishments primarily engaged in manufacturing agricultural and farm machinery and equipment, and other turf and grounds care equipment, including planting, harvesting, and grass mowing equipment (except lawn and garden-type).	

Table 8.18 (continued)

RELATED TARGET 1: FOOD & BEVERAGE PROCESSING	
NAICS 31121	Flour Milling & Malt Manufacturing
This industry comprises establishments primarily engaged in one or more of the following: (1) milling flour or meal from grains or vegetables; (2) preparing flour mixes or doughs from flour milled in the same establishment; (3) milling, cleaning, and polishing rice; and (4) manufacturing malt from barley, rye, or other grains.	
NAICS 31141	Frozen Food Manufacturing
This industry comprises establishments primarily engaged in manufacturing frozen fruit, frozen juices, frozen vegetables, and frozen specialty foods (except seafood), such as frozen dinners, entrees, and side dishes; frozen pizza; frozen whipped toppings; and frozen waffles, pancakes, and French toast.	
NAICS 31142	Fruit & Vegetable Canning, Pickling & Drying
This industry comprises establishments primarily engaged in manufacturing canned, pickled, and dried fruits, vegetables, and specialty foods. Establishments in this industry may package the dried or dehydrated ingredients they make with other purchased ingredients.	
NAICS 311615	Poultry Processing
This industry comprises establishments primarily engaged in (1) slaughtering poultry and small game and/or (2) preparing processed poultry and small game meat and meat byproducts.	
NAICS 31212	Breweries
This industry comprises establishments primarily engaged in brewing beer, ale, lager, malt liquors, and nonalcoholic beer.	
NAICS 31214	Distilleries
This industry comprises establishments primarily engaged in one or more of the following: (1) distilling potable liquors (except brandies); (2) distilling and blending liquors; and (3) blending and mixing liquors and other ingredients.	

Table 8.18 (continued)

TARGET 2: INDUSTRIAL PRODUCTS MANUFACTURING	
NAICS 3262	Rubber Product Manufacturing
This industry group comprises establishments primarily engaged in processing natural, synthetic, or reclaimed rubber materials into intermediate or final products using processes, such as vulcanizing, cementing, molding, extruding, and lathe-cutting.	
NAICS 3273	Cement & Concrete Products Manufacturing
This industry group comprises establishments primarily engaged in one of the following: (1) manufacturing Portland, natural, masonry, pozzolanic, and other hydraulic cements; (2) acting as batch or mixing plants, manufacturing concrete delivered to a purchaser in a plastic and unhardened state; (3) manufacturing concrete pipe, brick, and block; or (4) manufacturing other concrete products (except block, brick, and pipe).	
NAICS 3323	Architectural & Structural Metals Manufacturing
This industry group comprises establishments primarily engaged in manufacturing one or more of the following: (1) prefabricated metal buildings, panels and sections; (2) structural metal products; (3) metal plate work products; (4) metal framed windows (i.e., typically using purchased glass) and metal doors; (5) sheet metal work; and (6) ornamental and architectural metal products.	
NAICS 33271	Machine Shops
This industry comprises establishments known as machine shops primarily engaged in machining metal and plastic parts and parts of other composite materials on a job or order basis.	
NAICS 3329	Other Fabricated Metal Manufacturing
This industry group comprises establishments primarily engaged in manufacturing fabricated metal products (except forgings and stampings, cutlery and handtools, architectural and structural metals, boilers, tanks, shipping containers, hardware, spring and wire products, machine shop products, turned products, screws, and nuts and bolts).	
NAICS 33392	Material Handling Equipment Manufacturing
This industry comprises establishments primarily engaged in manufacturing material handling equipment, such as elevators and moving stairs; conveyors and conveying equipment; overhead traveling cranes, hoists, and monorail systems; and industrial trucks, tractors, trailers, and stacker machinery.	
NAICS 33399	All Other General Purpose Machinery Manufacturing
This industry comprises establishments primarily engaged in manufacturing general purpose machinery (except ventilation, heating, air-conditioning, and commercial refrigeration equipment; metalworking machinery; engines, turbines, and power transmission equipment; and material handling equipment).	
NAICS 33711	Wood Kitchen Cabinet & Countertop Manufacturing
This industry comprises establishments primarily engaged in manufacturing wood or plastics laminated on wood kitchen cabinets, bathroom vanities, and countertops (except freestanding). The cabinets and counters may be made on a stock or custom basis.	
NAICS 337127	Institutional Furniture Manufacturing
This U.S. industry comprises establishments primarily engaged in manufacturing institutional-type furniture (e.g., library, school, theater, and church furniture). Included in this industry are establishments primarily engaged in manufacturing general purpose hospital, laboratory, and dental furniture.	

Table 8.18 (continued)

TARGET 3: TRANSPORTATION, DISTRIBUTION & RELATED MANUFACTURING	
NAICS 42451	Grain & Field Bean Merchant Wholesalers
This industry comprises establishments primarily engaged in the merchant wholesale distribution of grains, such as corn, wheat, oats, barley, and unpolished rice; dry beans; and soybeans and other inedible beans. Included in this industry are establishments primarily engaged in operating country or terminal grain elevators primarily for the purpose of wholesaling.	
NAICS 42471	Petroleum Bulk Stations & Terminals
This industry comprises establishments with bulk liquid storage facilities primarily engaged in the merchant wholesale distribution of crude petroleum and petroleum products, including liquefied petroleum gas.	
NAICS 42491	Farm Supplies Merchant Wholesalers
This industry comprises establishments primarily engaged in the merchant wholesale distribution of farm supplies, such as animal feeds, fertilizers, agricultural chemicals, pesticides, plant seeds, and plant bulbs.	
NAICS 42512	Wholesale Trade Agents & Brokers
This industry comprises wholesale trade agents and brokers acting on behalf of buyers or sellers in the wholesale distribution of goods. Agents and brokers do not take title to the goods being sold but rather receive a commission or fee for their service. Includes agents and brokers for durable and nondurable goods.	
NAICS 482	Rail Transportation
Industries in the Rail Transportation subsector provide rail transportation of passengers and/or cargo using railroad rolling stock. The railroads in this subsector primarily either operate on networks, with physical facilities, labor force, and equipment spread over an extensive geographic area, or operate over a short distance on a local rail line.	
NAICS 4862	Pipeline Transportation of Natural Gas
This industry comprises establishments primarily engaged in the pipeline transportation of natural gas from processing plants to local distribution systems. This industry includes the storage of natural gas because the storage is usually done by the pipeline establishment and because a pipeline is inherently a network in which all the nodes are interdependent.	
NAICS 4885	Freight Transportation Arrangement
This industry comprises establishments primarily engaged in arranging transportation of freight between shippers and carriers. These establishments are usually known as freight forwarders, marine shipping agents, or customs brokers and offer a combination of services spanning transportation modes.	
NAICS 49312	Refrigerated Warehousing & Storage
This industry comprises establishments primarily engaged in operating refrigerated warehousing and storage facilities. The services provided by these establishments include blast freezing, tempering, and modified atmosphere storage services.	
NAICS 49313	Farm Product Warehousing & Storage
This industry comprises establishments primarily engaged in operating bulk farm product warehousing and storage facilities (except refrigerated). Grain elevators primarily engaged in storage are included in this industry.	

Table 8.18 (continued)

RELATED TARGET 3: AVIATION & AVIONICS	
NAICS 334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing
This U.S. industry comprises establishments primarily engaged in manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments. Examples of products made by these establishments are aircraft instruments (except engine), flight recorders, navigational instruments and systems, radar systems and equipment, and sonar systems and equipment.	
NAICS 336412	Aircraft Engine and Engine Parts Manufacturing
This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing aircraft engines and engine parts; (2) developing and making prototypes of aircraft engines and engine parts; (3) aircraft propulsion system conversion (i.e., major modifications to systems); and (4) aircraft propulsion systems overhaul and rebuilding.	
NAICS 336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing
This industry comprises establishments primarily engaged in (1) manufacturing aircraft parts or auxiliary equipment (except engines and aircraft fluid power subassemblies) and/or (2) developing and making prototypes of aircraft parts and auxiliary equipment. Auxiliary equipment includes such items as crop dusting apparatus, armament racks, inflight refueling equipment, and external fuel tanks.	
NAICS 4881	Support Activities for Air Transportation
This industry group comprises establishments primarily engaged in providing services to the air transportation industry. These services include airport operation, servicing, repairing (except factory conversion and overhaul of aircraft), maintaining and storing aircraft, and ferrying aircraft.	

Table 8.18 (continued)

TARGET 4: HEALTH SERVICES	
NAICS 611519	Other Technical and Trade Schools
This industry comprises establishments primarily engaged in offering job or career vocational or technical courses (except cosmetology and barber training, aviation and flight training, and apprenticeship training). The curriculums offered by these schools are highly structured and specialized and lead to job-specific certification.	
NAICS 621111	Offices of Physicians, Dentists, and Other Health Practitioners
This U.S. industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of general or specialized medicine (except psychiatry or psychoanalysis) or surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
NAICS 6214	Outpatient Care Centers
This industry includes establishments that provide specialized outpatient treatment such as family planning, mental health, substance abuse treatment, kidney dialysis, ambulatory surgery, and emergency care.	
NAICS 6215	Medical and Diagnostic Laboratories
This industry comprises establishments known as medical and diagnostic laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis and diagnostic imaging, generally to the medical profession or to the patient on referral from a health practitioner.	
NAICS 6216	Home Health Care Services
This industry comprises establishments primarily engaged in providing skilled nursing services in the home, along with a range of the following: personal care services; homemaker and companion services; physical therapy; medical social services; medications; medical equipment and supplies; counseling; 24-hour home care; occupation and vocational therapy; dietary and nutritional services; speech therapy; audiology; and high-tech care, such as intravenous therapy.	
NAICS 623	Nursing and Residential Care Facilities
Industries in the Nursing and Residential Care Facilities subsector provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. In this subsector, the facilities are a significant part of the production process, and the care provided is a mix of health and social services with the health services being largely some level of nursing services.	

Table 8.18 (continued)

LOCAL TARGET: ENTREPRENEURIAL, HOSPITALITY & RETAIL DEVELOPMENT	
NAICS 4452	Specialty Food Stores
This industry group comprises establishments primarily engaged in retailing specialized lines of food.	
NAICS 4481	Clothing Stores
This industry group comprises establishments primarily engaged in retailing new clothing.	
NAICS 453220	Gift, Novelty, and Souvenir Stores
This industry comprises establishments primarily engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.	
NAICS 4539	Other Miscellaneous Store Retailers
This industry group comprises establishments primarily engaged in retailing new miscellaneous specialty store merchandise, including pets and pet supplies, art and art supplies, tobacco, candles, and collectors' items.	
NAICS 531120	Lessors of Nonresidential Buildings (except Miniwarehouses)
This industry comprises establishments primarily engaged in acting as lessors of buildings (except miniwarehouses and self-storage units) that are not used as residences or dwellings. Included in this industry are: (1) owner-lessors of nonresidential buildings; (2) establishments renting real estate and then acting as lessors in subleasing it to others; and (3) establishments providing full service office space, whether on a lease or service contract basis.	
NAICS 7211	Traveler Accommodation
This industry comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels, and motels. The establishments in this industry may offer food and beverage services, recreational services, conference rooms and convention services, laundry services, parking, and other services.	
NAICS 7224	Drinking Places
This industry comprises establishments known as bars, taverns, nightclubs, or drinking places primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services.	
NAICS 7225	Restaurants and Other Eating Places
This industry comprises establishments primarily engaged in one of the following: (1) providing food services to patrons who order and are served while seated (i.e., waiter/waitress service), and pay after eating; (2) providing food services to patrons who generally order or select items (e.g., at a counter, in a buffet line) and pay before eating; or (3) preparing and/or serving a specialty snack (e.g., ice cream, frozen yogurt, cookies) and/or nonalcoholic beverages (e.g., coffee, juices, sodas) for consumption on or near the premises.	

CHAPTER 9: WHERE DO WE GO FROM HERE: RECOMMENDATIONS



Our scope of work focused on assessing Harvey County's global competitiveness as a business location and recommending business/industry targets based on the research and due diligence. This report and recommendations, together, are not a comprehensive economic development strategy. The recommendations below only reflect those items that we believe the HCEDC should undertake to effectively market to and attract the recommended industry targets.

Recommendations for action are categorized under two areas of opportunity:

Product Marketing⁴

Product Improvement⁵

The “product” is considered Harvey County and the local municipalities.

There are three common denominators within counties that contribute to economic development success:

- A strong “product—something to market and sell
- A well-funded budget to execute plans and initiatives
- Mid- to long-term projects to accomplish transformative change

4. Product marketing is defined as marketing/promoting or selling the County worldwide for business development opportunities and investment.

5. Product improvement is defined as the County and local municipalities having the necessary infrastructure, including a favorable business climate that attracts investment to the area. Product development is the foundation that allows product marketing to succeed.

We have devised our recommendations to keep these three tenets in mind.

What is Competitiveness?

An area's economic competitiveness depends on several factors. On a macro level, as illustrated in Figure 9.1, it includes not only the regulatory environment and infrastructure an area provides but also its talent base, available sites, and economic development service delivery. A favorable tax environment and the willingness to offer creative and unique incentive packages are important, as are low operating costs and reliable, affordable sites. Similarly, companies look for areas that offer relevant and scalable skilled labor along with low labor costs as much as they look for quality sites that are flexible and allow for future expansion with minimal development time. Finally, the ability of an area to provide economic development services—for example, clear, succinct, and focused marketing messages; organized and coordinated outreach; and high levels of client service—sets leading areas apart.

More specifically, Figure 9.2 illustrates the top business factors that companies rank as the most important in their site-selection process, according to an annual survey conducted by *Area Development Magazine*. The survey consists of a cross-section of companies of diverse industry sectors and sizes. Figure 9.3 notes the top “Quality of Place” factors companies consider to be important when choosing a new location. Garner Economics developed recommendations with an understanding of what these potential investors, “the customer,” deem critical in their decision-making process.

FIGURE 9.1: ELEMENTS OF COMPETITIVENESS

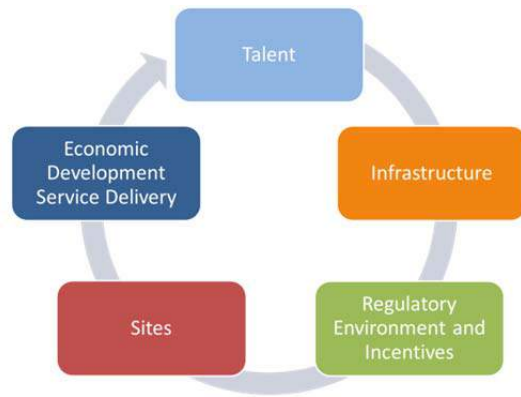


FIGURE 9.2: BUSINESS FACTORS

RANKING	2016	2015*
1. Highway accessibility	94.4	88.0 (2)
2. Availability of skilled labor	89.8	92.9 (1)
3. Labor Costs	89.6	80.8 (6)
4. Occupancy or construction costs	86.0	85.4 (4)
5. State and local incentives	84.0	75.8 (9)
6. Corporate tax rate	82.3	78.8 (7)
7. Tax exemptions	79.7	74.7 (11)
8. Energy availability and costs	78.5	75.3 (10)
9. Proximity to major markets	78.1	76.3 (8)
10. Quality of life	76.4	87.6 (3)
11. Available buildings	75.5	83.7 (5)
12. Available land	75.3	73.9 (13)
13. Expedited or "fast-track" permitting	71.7	74.2 (12)

** 2015 ranking

Source: Area Development Magazine, 2017

FIGURE 9.3: QUALITY OF PLACE FACTORS

RANKING	2014	2013
1. Low crime rate	84.4	80.9 (1)**
2. Ratings of public schools	75.3	73.0 (4)
3. Health care facilities	74.2	79.7 (2)
4. Housing availability	69.7	71.5 (5)
4T. Housing costs	69.7	75.3 (3)
6. Colleges and universities in area	68.3	59.5 (7T)
7. Recreational opportunities	65.9	66.4 (6)
8. Cultural opportunities	60.8	54.8 (8)
9. Climate	60.0	59.5 (7T)

Source: Area Development Magazine, 2015

The recommendations offered below are based on the assumption that the County must become proactive in shaping its economic future—with a more targeted approach and better defined roles and responsibilities. The County leadership and HCEDC staff must also take a leadership role in advocating for policy changes and making the case for how such economic development enhancements will improve the overall quality of place and competitiveness for the area.

The following recommendations note an estimated cost to implement, where applicable or feasible in providing.

ENHANCE THE PRODUCT (PRODUCT IMPROVEMENT)

The County's "product" is defined as the infrastructure—including a favorable business climate—needed to attract investment to the community. Local marketing efforts will only be successful if Harvey County has a "product" to sell, including sites and buildings, transportation infrastructure, utility infrastructure, workforce development, leadership, and incentives.

Strategy:

Further develop assets and initiatives in key areas that support the County's desire to attract and grow more high-quality economic activities and to support the current and future residents of Harvey County.

1. **Develop a speculative shell building to attract an investor/company within one of the targeted industry sectors.**

Observation: The HCEDC currently markets six municipally owned industrial parks throughout the County, each with their own unique attributes. Each shows well as a location for a manufacturing or distribution type of facility. There are approximately 500 acres in aggregate. Prices range from \$5,000 to \$11,000 per acre.

However, the HCEDC currently has listings for only three buildings totaling 52,000 square feet. The limitations of these existing properties may cause many potential investors to overlook Harvey County since those existing properties may not meet their needs.

Recommendation: The HCEDC should work with a private developer, or by itself as the developer, to construct a 50,000-square-foot speculative building expandable to 100,000 square feet. The building should have an unfinished floor and a ceiling height greater than 30 feet. A high ceiling height will allow for the utilities to drop from the ceiling and serve as the beginning of a food-grade building. This type of building will serve as an effective marketing tool in Harvey County's efforts to attract *Food & Beverage*-related companies noted in Chapter 8.

The HCEDC should engage an architectural/engineering (A&E) firm to design the speculative facility based on those requirements noted above for F&B-related companies, but also broad enough to allow for other targeted types of companies should companies in other industries express interest. The A&E firm should provide a cost estimate for the construction of the building, which can then be used for the solicitation of capital to construct the facility. Placing the speculative building in the Kansas Logistics Park would be an ideal precedent for Harvey County's first speculative building.

Lead organization: HCEDC

Cost: Initial A&E consulting fees

"Harvey County needs to decide who it wants to be. Is it going to be a bedroom community to McPherson County industry and Sedgwick County industry? If so, it needs to focus on fitting into that niche. Currently, there are groups working in various capacities, which have no common theme. It becomes fragmented as everyone goes his own direction."

—Survey Respondent

2. Create a culture, programs, and support infrastructure for entrepreneurship in Harvey County.

Observation: The Kauffman Foundation suggests that, nationally, new firms and young businesses disproportionately contribute to net job creation throughout the economy and account for more than two-thirds of gross job creation. Data in Chapter 5 suggest that such activity is weak in Harvey County (page 47). Measuring the relative proportion of persons who are *Self-Employed* is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

Table 9.1
2010–2015 Change in Self Employment
Self-Employed as a Percentage of Workers 16 Years+

	Self-Employed– Incorporated	Self-Employed– Not Incorporated & Unpaid Family Workers	Self-Employed Total
Harvey County			
2010	2.5%	8.6%	11.1%
2015	3.6%	5.3%	8.9%
Kansas			
2010	3.2%	7.3%	10.5%
2015	3.2%	6.3%	9.5%
United States			
2010	3.6%	6.7%	10.3%
2015	3.4%	6.2%	9.6%

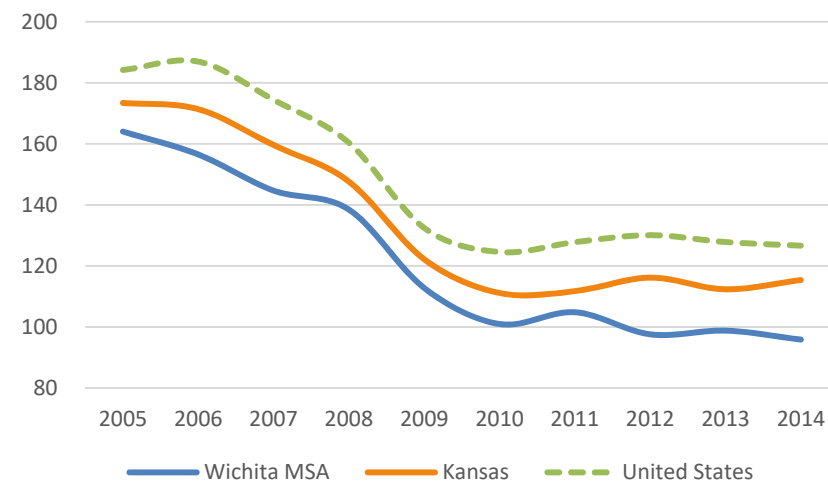
Source: U.S. Census Bureau American Community Survey 2011–2015,
5-Year Average; Garner Economics

For all civilian workers ages 16 and over, a total of 8.9 percent of workers in Harvey County were classified as *Self-Employed*.

Tracking the rate of startup firms is another good measure of the entrepreneurial ecosystem of an area. The ability to create a new company, which establishes new jobs, bolsters the local economy.

The Wichita MSA, which includes Harvey County, had 615 new firms started in 2014. This is down from a peak of 944 new firms in 2005 and has relatively leveled off since 2010.

Figure 9.4
Startup Firms



Source: U.S. Census Bureau, Business Dynamics Statistics, Garner Economics

Recommendation: The HCEDC and County government should partner with one of the existing academic institutions to create a small-business incubator and related programs to grow entrepreneurship in the area and to help entrepreneurs overcome the odds of startup failure. This complements the Local target noted in the previous chapter.

The International Business Innovation Association defines business incubators as “facilities and programs that nurture the development of entrepreneurial companies, helping them survive and grow during the startup period, when they are most vulnerable. These programs provide their client companies with business support services and resources tailored to young firms. The most common goals of incubation programs are creating jobs in a community, enhancing a community’s entrepreneurial climate, retaining businesses in a community, building or accelerating growth in a local industry, and diversifying local economies.”

According to the *State of the Business Incubation Industry*, as of 2012, there are about 1,200 incubators in the United States, up from 12 in 1980.

About 32 percent of North American business incubators are sponsored by academic institutions.

- 25 percent are sponsored by economic development organizations.
- 16 percent are sponsored by government entities.
- 4 percent are sponsored by other types of organizations.
- 4 percent of business incubators are “hybrids” with more than one sponsor.
- 4 percent are sponsored by for-profit entities.
- 15 percent of incubators have no sponsor or host organization.

Based on our own observations of successful incubation programs and facilities (which are validated by the statistics noted above), we believe that the best chance for success is a collaboration between an academic institution and the HCEDC. Ideally, the incubator would be managed by an academic institution, and the representatives from that institution would serve as a resource to the entrepreneurs that are housed at the facility.

Typically, incubators offer the following business consulting to help entrepreneurs and small-business second stage companies:

- | | |
|--------------------------|------------------------------|
| • Accounting | • Patents |
| • Finances | • Business management |
| • Human resources | • Marketing and branding |
| • Web design | • Process improvement |
| • Life strategy coaching | • Infrastructure development |
| • Federal acquisition | |



3. Engage a firm to analyze the County's and/or a specific municipality's best effort to attract retail to enhance the area's quality of place assets.

Observation: The face of retail nationally continues to go through a transformative change. Boutique business currently have a market niche while many chain retailers, large and small, continue to suffer. Thousands of store closings and employee layoffs continue to dominate the retail market.

As noted by both survey respondents and our own **Assets and Challenges Assessment** of the County, shopping, dining and accommodations assets are a challenge in Harvey County. Quality of Place ranks high on a company's review of communities related to investment decisions because companies want to ensure that the talent they attract or bring to the area will want to remain there. Though Newton has made excellent progress in creating some assets—primarily in health care and physical fitness facilities (the hospital and YMCA)—most other areas related to retail offerings are lacking.

Recommendation: Harvey County must approach retail opportunities the same way they did in conducting this targeted industry study—professionally and with dedicated resources. The County, or a municipality that is focused on growing retail, should engage a specialized retail consulting firm to help create a structured, targeted plan that will identify the area's best opportunity for retail attraction.

Lead: The Chamber of Commerce, Harvey County, or any of the local municipalities.

Cost: \$35,000–50,000

TELL THE STORY (MARKETING)

By being more proactive, Harvey County and the HCEDC have the opportunity to tell the County's story more effectively and to be a better spokesperson for the economic dynamism of the community. Site-location advisors and companies within the targeted industries and clusters are the primary audience for such efforts. All of the recommendations below are for the HCEDC as the lead, unless otherwise noted.

Strategy:

Tell Harvey County's economic development story more effectively to a targeted audience of potential companies and investors.

1. Develop a unified brand for Harvey County.

Observation: Individually, the HCEDC, Newton Chamber of Commerce, Convention and Visitors Bureau, and the County government have individual logos, taglines, and messaging for external audiences. Since marketing is expensive, best practice research and experience suggest a successful destination/location marketing strategy is to generate a unified voice for investment or spending (tourism) opportunity in Harvey County. To do so, all organizations must agree to have a unified, cohesive brand that promotes the County to both internal and external audiences.



In a recent webinar focused on the positive influence tourism can have on traditional economic development activities, Atlas Advertising noted the following:

- Places leave the most lasting impressions, tangible or intangible, on human beings as individuals, whether they are deciding where a company stays or relocates or where they want to vacation.
- As information is more readily available and the competition to attract talent or visitors heightens, visitors and companies face more difficult decisions. The onset of digital and easily accessible information and data is a game-changer in how decisions are made.
- More and more, companies are seeking to locate where the workforce and talent are and visitors tend to seek options for their next vacations based on information they glean from the internet. How a community's brand attracts and retains those audiences is the destination challenge of the next 25 years.
- With a discernible and credible brand, communities can be more successful and credible in having a real dialogue about the community's assets, differentiating factors, and authentic character.

Recommendation: Harvey County should lead the development of an overall, unified brand identity to be used by the County and organizations involved in economic development and tourism attraction for both business development and tourism promotion to external audiences.

As such, the HCEDC, Chamber, CVB, and the County should engage a firm that specializes in brand development to create a unified brand for Harvey County.

Cost: \$50,000 for brand creation (does not include collateral development or advertising)

2. Enhance the HCEDC's marketing tools and tactics in its external outreach efforts.

Observation: With the HCEDC's efforts taking a more proactive and focused effort as a result of implementing this targeted industry strategy, more emphasis should be placed on fine-tuning messages and marketing to target audiences that will have a direct impact on the HCEDC's economic development goals. Given the wealth of information and data provided in this body of work, the HCEDC would benefit from an integrated plan for communications, marketing, and public relations. Doing so will strengthen the County's position for economic development, entrepreneurship, business attraction, and talent attraction to a U.S. and international audience comprised of C-level executives, site selectors, and skilled professionals.

Additionally, research and experience have shown that between 30 and 40 percent of all investment projects in the United States are facilitated by site selectors and real estate brokers. This means that the majority of investment projects emanate from

companies directly. This also suggests that it is incumbent upon the HCEDC to have a marketing framework that touches all of these audiences. The recommendations suggested below are aimed at addressing both audiences.

Recommendations:

A. Conduct in-market sales missions to Atlanta, New York, Chicago, and Dallas with site-selection consultants.

Direct, one-on-one meetings with site-selection consultants is one of the most effective methods to begin raising awareness about Harvey County as a potential business location, as well as to build long-term relationships with this important group. These meetings present a platform for HCEDC representatives to discuss the attributes of Harvey County and the region. These would typically work with the regional group in Wichita whose mission it is to promote marketing on a regional level.

Because economic development is a relationship business, this proactive effort allows the HCEDC to create and nurture long-term relationships with consultants. Garner Economics recommends that the HCEDC representatives participate in missions to markets that have a high concentration of site-selection consultants, namely Atlanta, New York, Chicago, and Dallas.

Once the HCEDC is able to discern where there are other concentrations of target business sector decision-makers, the markets visited can be revised and updated.

Cost: \$7,500 annually

B. Execute a process for lead generation and business target profiling with the targeted companies.

To jump-start the County's ability to fully utilize the business sector targets and subsector targets identified in Chapter 9, the HCEDC should engage a marketing firm to provide lead generation services that identify qualified investment opportunities. This service should yield a list of companies (including the company's current location, contact information for the C-level executive responsible for choosing future operation sites, business description [NAICS code, etc.], and magnitude of recent growth) that would be hot prospects for the HCEDC's recruitment efforts.

If done correctly, the lead generation identification process is methodical and evaluates key company performance metrics including sales, employment, growth, number of locations, and other relevant factors. The process tracks and evaluates "events" undertaken by companies in the identified target business sectors that indicate expansion or consolidation. Such events would include mergers and acquisitions, executive changes, or technology development. The process would also track overall industry trends. Through this evaluation of indicative corporate behavior, the lead generation firm would identify specific companies and qualified leads that are "best bets" to consider an expansion opportunity in the short- and medium-term.



Engaging a firm with a lead generation capacity will enable the HCEDC to conduct its marketing efforts in a focused and more direct manner. With a list of qualified leads, the HCEDC can focus its efforts on specific companies and concentrate broader marketing efforts in areas where there is a larger concentration of the qualified companies. The approach would be more cost effective and would focus business development efforts.

Cost: \$15,000–25,000

C. Enhance the HCEDC website to address the needs of location consultants and potential investors (companies).

Observation: Though the HCEDC website contains information that is of value to potential investors in many facets, it is difficult to find existing data on the current website or the data may be irrelevant. The site also has a dated feel compared to other best practice websites noted below. An economic development organization's (EDO) website is its most important marketing tool to attract investment into the region. As such, the HCEDC website needs to be designed to offer the resources that meet its primary and specific audiences' needs.

Recommendation: As the HCEDC works to implement its business development and marketing efforts for the County, its website should be adjusted to serve both the information needs and the interests of location advisory audiences and companies doing site searches on their own. The site's navigation functionality, graphic appeal, and available data should be built and directed to these external audiences.

From the perspective of a location advisory firm, Garner Economics suggests the following recommendations to enhance the HCEDC website:

- Navigation should be restructured to better serve each target sector, especially for recruitment. Successful websites have oriented navigation by audience type, such as the optimal industry targets noted in Chapter 8.
- While advisors will begin their expansion or location search via the internet, eventually real-time contact with considered locations is made. Contact information (especially phone) should be clearly visible on each page (e.g., in the header of the site) and on all material for printing or downloading.
- Data most commonly considered in the location process by site selectors and corporate end users should be available and easily accessible. The data compiled for the HCEDC from this report be used.
- A PDF creator should be employed, so visitors can customize documents for printing or downloading.



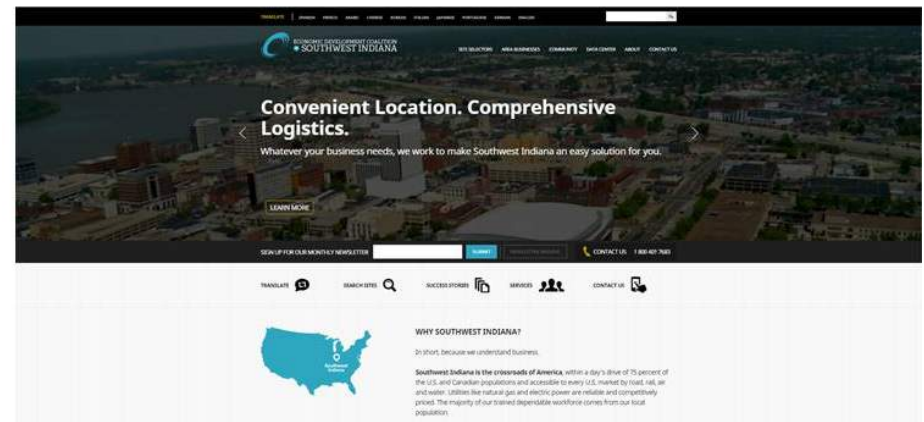
Website recommendations, continued

- Branded, thematic maps should be created to orient and inform website visitors.
- Social media tools should be integrated into the website's strategy given the local audience and investors that use such tools. Site-location consultants and many companies that are engaged in the site-location search will not use social media as frequently; however, potential work talent and employees do, and they may influence their company's location decision.
- Content providing a County and regional overview and statistical data should be created and translated into the languages of potential international clients (e.g., Japanese, Chinese, Korean, German, and Spanish).

Best practice examples:

- EDC of Southwest Indiana (<http://www.southwestindiana.org>)
- Charlotte Regional Partnership (<http://charlotteusa.com>)
- Boone County, Indiana (<http://booneedc.org/>)
- Chambers County, Alabama (<http://www.chambersida.com/>)

Cost: \$20,000 +/-



CHAPTER 10: CALL TO ACTION



To be successful in executing the Target Industry Strategy (TIS), Harvey County will need to leverage its unique mix of assets to strengthen the area's product and market its value proposition to the targets. While Harvey County has a strong base from which to build, the area must be more proactive in building the assets and infrastructure needed to attract the higher-quality targets and companies. As noted in the **Assets and Challenges Assessment**, there are several areas where improvement would better set Harvey County apart from peer communities. To be successful, HCEDC needs to focus its targeted industry efforts and find more resources to devote to its economic development marketing.

Through this TIS, HCEDC and the community's leaders can make long-term investments to ensure that Harvey County can attract the types of activity it wants. By taking a proactive leadership position, HCEDC can work to transform Harvey County into a place that attracts quality talent and companies while maintaining its character.

To create such change, the HCEDC and the entire community will need to be more proactive and champion for long-term investments that will service both existing and new companies. HCEDC must take a more structured approach to telling the area's story. With this new strategy, HCEDC should communicate the County's assets more specifically to the desired companies that the community wants to attract, while also leveraging those assets to continue to serve the existing company base.

Inherent in this change will be a more proactive and outward-facing marketing and business recruiting effort. In addition to targeting the optimal industries noted earlier in this report, HCEDC must work with other economic development partners and stakeholders to create and encourage the development of the spaces and places where such activity will occur.

Garner Economics would like to thank the HCEDC staff and leadership for their help and assistance during this process. Their compilation of data and information, as well as their openness and willingness to explore various opportunities to strengthen operations, have contributed to the richness and rigor of this report.

RECOMMENDATIONS SUMMARY

The results of this work create a Targeted Industry Strategy for Harvey County that will inform HCEDC's economic development and marketing work for years to come. By taking proactive action to tell its story and strengthen its assets, Harvey County can build economic opportunities for its residents, businesses, and future residents. The following is a summary of the recommendations offered in this Targeted Industry Strategy. (These were developed given the analysis and assessment taken during the first two phases of the project.)

Strategy	Description	Actions
Enhance the Product— Product Development	Further develop assets and initiatives in key areas that support the County's desire to attract and grow more high-quality economic activities and to support the current and future residents of Harvey County.	<ol style="list-style-type: none"> 1. Develop a speculative shell building to attract an investor/company within one of the three targeted industry sectors. 2. Create a culture, programs, and support infrastructure for entrepreneurship in Harvey County. 3. Engage a firm to analyze the County's and/or a specific municipality's best effort to attract retail to enhance the area's quality of place assets.
Tell the Story— Marketing	Tell Harvey County's economic development story more effectively to a targeted audience of potential companies and investors.	<ol style="list-style-type: none"> 1. Develop a unified brand for Harvey County. 2. Enhance the HCEDC's marketing tools and tactics in its external outreach efforts. <ol style="list-style-type: none"> A. Conduct in-market sales missions to Atlanta, New York, Chicago, and Dallas with site-selection consultants. B. Execute a process for lead generation and business target profiling with the targeted companies. C. Enhance the HCEDC website to address the needs of location consultants and potential investors.

Appendix 1: Survey Responses

1. What are several words or phrases that describe Harvey County? (Choose up to five responses.)

Response option	# rec'd
Centrally located	64
Sense of community	58
Aging	58
Strong existing industries	37
Stagnant	36
Average	36
Agricultural	35
Small	30
Dedicated/stable workforce	24
Location	23
Collaborative	23
Safe	23
Strong quality of place	22
Historic	20
Not very diverse	20
Politically polarized	19
Growing	18
Low cost of living	18
Entrepreneurial	10
Low cost of doing business	10
Kansas Logistics Park	10
Diverse economic base	9

2. What do you think are some of the biggest obstacles that inhibit Harvey County in its ability to attract, expand, or retain businesses and investment? (Choose up to five responses.)

Response option	# rec'd
Lack of amenities for young professionals	82
Lack of quality restaurants	74
Not attractive to trailing spouses/young professionals	72
Taxes and fees	50
Aging infrastructure, incl. transportation	42
Lack of economic diversity	41
Small population	36
Weak K-12 education system	25
Location	20
Poor worker quality	18
Lack of demographic diversity	17
Lack of industrial parcels	10

Other responses include: (*indicates response given multiple times)

- Proximity to Wichita (9)*
- Lack of amenities/retail for residents (8)*
- Not welcoming to new business
- Lack of leadership
- Rising crime
- Taxes

3. On a scale of 1–5, with 5 being “Very Strong,” how would you rate the business climate of Harvey County and the City of Newton (with business climate defined as those policies and laws enacted by the County or city that impact local businesses, either positively or negatively)?

Response option	# rec'd
Harvey County	
1 - Very Weak	22
2 - Weak	75
3 - Average	31
4 - Strong	2
5 - Very Strong	0

Newton	
1 - Very Weak	2
2 - Weak	31
3 - Average	72
4 - Strong	20
5 - Very Strong	2

4. What do you see as the County’s strengths? (Choose up to five responses.)

Response option	# rec'd
Near Wichita	108
Centrally located	78
Family-friendly atmosphere	62
Health care	51
Sense of community	45
Agriculture industry	42
Excellent schools	41
Manufacturing base	26
Higher education institutions	22
Dedicated/stable workforce	19
Low cost of doing business	19
Recreational activities	15
Strong quality of place	14
Diverse economic base	3

5. How would you characterize the workforce in Harvey County? (Choose up to five responses.)

Response option	# rec'd
Strong competition with Wichita; large number of out-commuters	75
Difficult to find skilled mechanical/technical labor	62
Aging workforce	57
Small pool of mid-level professionals	46
Difficult to find entry-level workers	44
Difficult to recruit needed workforce nationally	40
Good work ethic	36
Lacking in "soft" skills	32
Strong labor pool in particular industries	30
Easy to find labor for lower-skilled jobs	29
Quantity and quality is excellent	6
Able to recruit needed workforce nationally	1

6. For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks. What hard or soft infrastructure is weak or missing in Harvey County? (Choose up to five responses.)

Response option	# rec'd
Retail options	76
Amenities for young professionals	66
High-speed internet	50
Support for small or new businesses	50
Affordable housing	48
Public transportation	47
Sense of place/amenities	36
Regional (Countywide) approach to growth	34
An incubator to support startups	29
Bike paths/pedestrian paths	23
Alternative transportation options	23
Commercial space	11
Mixed-use developments	11
Shovel-ready sites	9
Existing infrastructure is good/sufficient	8
Effective internal road system	6

7. Often, economic development change begins with setting forth a vision. Without worrying about money or politics, please indicate the top five items you would like to see the County leadership take on to strengthen its ability to attract and retain quality companies and talent to Harvey County in the next 5–10 years. Use 1 to indicate the most important item; use 2 to indicate the second most important; 3 to indicate the third most important item; 4 to indicate the fourth most important item; and 5 to indicate the fifth most important item:

	First priority	Second priority	Third priority	Fourth priority	Fifth priority
Attract and grow jobs/lessen need to out-commute	20	20	19	14	16
Create a strategic plan to build a diverse set of industries that provides employment opportunities for everyone	21	19	9	19	9
Work more closely with higher education institutes to strengthen workforce training and support entrepreneurs	8	17	15	14	11
Build a regional vision and plan for the area	20	12	12	12	8
Invest in more local vocational training, especially in trades (e.g., welding, machining, etc.)	12	16	13	10	12
Build a regional destination that draws activity to the area	14	9	13	14	11
Better market Harvey County to potential companies	10	12	11	10	18
Provide high-speed fiber to all homes and businesses	13	10	15	6	10
Improve the school system (K-12) and school facilities	11	12	12	10	8
Host more festivals/events to build community pride	2	2	6	8	14
Build a better transportation system throughout the County	2	3	5	8	6



Other suggested initiatives include (number in parenthesis indicates responses made by multiple respondents):

- Initiatives to focus on the physical health of the community (2)
- Strengthen amenities to attract managerial talent (2)
- Focus on sustainability
- Broaden the representation on the EDC Board; get new and different perspectives
- Strengthen leadership training among residents working to frame/implement the community vision
- Prioritize low-income needs
- Reinstate FasTrac
- Execute the initiatives of ReNewton

8. Give some examples of local unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the County.

Most responses centered around quality of place amenities and partnerships to support the local workforce. Specific responses with more than one response include the following (number in parenthesis indicates number of individual responses):

- New YMCA (15)
- HCC and high school vocational tech programs (6)
- Kansas Logistics Park (6)
- New restaurants (5)
- Newton Medical Center (4)
- Newton Young Professionals (4)
- Relationships between Newton Medical Center and schools (4)
- Bethel College (3)
- Sand Creek Golf Course (3)
- Newton City/County airport (2)
- Newton Chamber of Commerce/"Network Kansas" (2)

9. Are there programs in peer/competitor regions that the County should consider for the area? If so, give examples.

Respondents noted programs that address the following. Number in parenthesis indicates the number of responses:

- Festivals that build community (5)
- Focus on vocational and other job training (5)
- Development of retail and recreation amenities (4)
- Focus on walkability and greenspace (2)
- Central distribution areas
- Incubator programs
- Investing in K-12 schools
- Leverage coalitions of local businesses
- Encourage private investment

Specific examples given were:

- Catoosia, Oklahoma
- IdeaTek in Moundridge
- Incentives in Park City
- Salina
- Unified government in south central Kansas
- McPherson City Main Street

10. What types of companies do you think would be a good fit for Harvey County?

Response option	# rec'd
Agribusiness	90
Distribution	76
Aviation support	74
Medical/health care	66
Advanced manufacturing	63
Regional office operations	32
Food processing	31
Recreation-based	30
Computer programming/software	24
Data centers	24
Professional business services	23
Technical service support	20
Financial Services	12
Other	9

Other responses include:

- Green energy manufacturers
- Companies requiring access to rail and highways
- Manufacturing.

10. Why would the company(ies) or target(s) you selected above be a good fit for Harvey County?

Responses provided the following reasons:

- Industry would bring/create high paying jobs
- It's a growing industry
- Harvey County has the infrastructure (mainly transportation infrastructure) to support the industry
- The industry could build on Harvey County's existing strengths—especially in agriculture and aviation—and leverage the existing workforce
- The industry could leverage Harvey County's location (both proximity to Wichita and being in the geographic middle of the continental United States)
- Harvey County has the workforce (skills) to support the industry

11. Are there any other issues that should be examined when developing a targeted industry strategy for Harvey County?

Most respondents reiterated themes and issues raised above. Responses included the below. Number in parenthesis indicates the number of responses.

- Build and enhance infrastructure (especially transportation) (7)
- Support existing businesses (5)
- Focus on workforce training (5)
- Market the region better (4)
- Address those who are anti-growth, unwelcoming to new business (4)
- Ensure policies protect the environment (3)
- Deal with the drug problem (3)
- Repeal the 40-acre rule (2)
- Look for a unified/regional approach (2)
- Focus on quality growth (2)
- Grow the tax base and mix of industries (2)
- Create more recreation activities (1)
- Look at the H1B visa levels (1)

APPENDIX 2: 2016 HARVEY COUNTY, KANSAS OCCUPATIONAL DETAILS

Specialized occupations are highlighted—light blue for location quotients greater than 1.20 and orange for location quotients above 3.

SOC	Description	2016 Location Quotient	2016 Jobs	2011–2016 Change	Avg. Hourly Earnings
11-0000	Management Occupations	0.91	814	78	\$34.59
11-1010	Chief Executives	1.56	50	4	\$62.37
11-1020	General and Operations Managers	0.76	177	16	\$43.82
11-2020	Marketing and Sales Managers	0.61	38	4	\$45.70
11-3010	Administrative Services Managers	0.78	23	2	\$35.06
11-3020	Computer and Information Systems Managers	0.40	15	2	\$42.39
11-3030	Financial Managers	0.72	43	3	\$42.08
11-3050	Industrial Production Managers	1.22	22	2	\$41.01
11-3060	Purchasing Managers	1.04	<10	Insf. Data	Insf. Data
11-3070	Transportation, Storage, and Distribution Managers	0.88	11	Insf. Data	\$40.41
11-3120	Human Resources Managers	0.85	13	2	\$37.49
11-9010	Farmers, Ranchers, and Other Agricultural Managers	2.40	123	34	\$13.76
11-9020	Construction Managers	0.88	34	(4)	\$24.73
11-9030	Education Administrators	1.29	65	(6)	\$31.76
11-9040	Architectural and Engineering Managers	0.68	13	2	\$54.96
11-9050	Food Service Managers	0.93	28	4	\$17.68
11-9110	Medical and Health Services Managers	1.14	40	3	\$40.06
11-9140	Property, Real Estate, and Community Association Managers	0.71	20	(2)	\$25.48
11-9150	Social and Community Service Managers	0.97	15	(1)	\$25.97
11-9190	Miscellaneous Managers	0.71	58	8	\$23.55
13-0000	Business and Financial Operations Occupations	0.66	540	47	\$28.22
13-1020	Buyers and Purchasing Agents	1.62	75	14	\$27.93
13-1030	Claims Adjusters, Appraisers, Examiners, and Investigators	0.35	11	(2)	\$32.75
13-1040	Compliance Officers	0.54	15	2	\$26.43
13-1050	Cost Estimators	0.94	23	3	\$28.16
13-1070	Human Resources Workers	0.65	41	2	\$26.17
13-1080	Logisticians	0.72	11	Insf. Data	\$31.75
13-1110	Management Analysts	0.28	24	0	\$30.71
13-1150	Training and Development Specialists	0.77	22	5	\$23.51

13-1160	Market Research Analysts and Marketing Specialists	0.68	39	5	\$27.30
13-1190	Miscellaneous Business Operations Specialists	0.55	56	7	\$28.67
13-2010	Accountants and Auditors	0.83	121	8	\$28.35
13-2050	Financial Analysts and Advisors	0.40	26	0	\$41.57
13-2070	Credit Counselors and Loan Officers	0.64	23	(1)	\$31.11
13-2080	Tax Examiners, Collectors and Preparers, and Revenue Agents	0.70	12	(1)	\$19.29
15-0000	Computer and Mathematical Occupations	0.43	195	34	\$26.68
15-1120	Computer and Information Analysts	0.36	26	4	\$32.25
15-1130	Software Developers and Programmers	0.25	43	7	\$32.38
15-1140	Database and Systems Administrators and Network Architects	0.57	39	3	\$28.18
15-1150	Computer Support Specialists	0.66	60	13	\$17.33
15-1190	Miscellaneous Computer Occupations	0.44	11	Insf. Data	\$29.53
15-2030	Operations Research Analysts	1.15	13	Insf. Data	\$29.87
17-0000	Architecture and Engineering Occupations	0.66	178	35	\$30.41
17-2010	Aerospace Engineers	1.18	<10	Insf. Data	Insf. Data
17-2020	Agricultural Engineers	8.66	<10	Insf. Data	Insf. Data
17-2050	Civil Engineers	0.41	12	Insf. Data	\$34.41
17-2070	Electrical and Electronics Engineers	0.36	12	Insf. Data	\$36.03
17-2110	Industrial Engineers, Including Health and Safety	0.75	22	0	\$37.90
17-2140	Mechanical Engineers	0.39	12	(2)	\$32.94
17-3010	Drafters	1.54	35	8	\$24.37
17-3020	Engineering Technicians, Except Drafters	0.98	46	10	\$26.08
19-0000	Life, Physical, and Social Science Occupations	0.39	52	7	\$29.85
19-3020	Survey Researchers	1.08	<10	Insf. Data	Insf. Data
19-3030	Psychologists	1.15	21	2	\$29.08
21-0000	Community and Social Service Occupations	1.48	396	47	\$17.59
21-1010	Counselors	1.60	118	27	\$17.77
21-1020	Social Workers	1.28	91	7	\$19.99
21-1090	Miscellaneous Community and Social Service Specialists	1.51	111	8	\$14.33
21-2010	Clergy	1.61	46	6	\$19.85
21-2020	Directors, Religious Activities and Education	1.53	22	0	\$19.48
21-2090	Miscellaneous Religious Workers	1.47	<10	Insf. Data	Insf. Data
23-0000	Legal Occupations	0.42	57	0	\$35.96
23-1010	Lawyers and Judicial Law Clerks	0.38	33	1	\$44.60
23-2010	Paralegals and Legal Assistants	0.36	11	1	\$21.53
23-2090	Miscellaneous Legal Support Workers	0.72	11	0	\$21.33
25-0000	Education, Training, and Library Occupations	1.16	1,086	(104)	\$17.68

25-1090	Postsecondary Teachers	0.68	107	3	\$29.45
25-2010	Preschool and Kindergarten Teachers	0.99	65	(11)	\$14.72
25-2020	Elementary and Middle School Teachers	1.07	229	(35)	\$19.48
25-2030	Secondary School Teachers	1.03	111	(18)	\$20.73
25-2050	Special Education Teachers	0.94	47	(3)	\$22.35
25-3020	Self-Enrichment Education Teachers	0.69	28	0	\$15.63
25-3090	Miscellaneous Teachers and Instructors	1.93	194	(13)	\$15.28
25-4010	Archivists, Curators, and Museum Technicians	1.60	<10	Insf. Data	Insf. Data
25-4020	Librarians	0.90	12	(1)	\$21.37
25-4030	Library Technicians	1.07	13	2	\$13.22
25-9010	Audio-Visual and Multimedia Collections Specialists	1.25	<10	Insf. Data	Insf. Data
25-9030	Instructional Coordinators	0.76	12	(1)	\$25.06
25-9040	Teacher Assistants	1.85	252	(28)	\$11.62
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	0.67	197	(2)	\$16.68
27-1020	Designers	0.66	44	4	\$15.27
27-2020	Athletes, Coaches, Umpires, and Related Workers	1.22	39	(6)	\$16.76
27-2040	Musicians, Singers, and Related Workers	1.16	32	1	\$16.57
27-3030	Public Relations Specialists	0.75	19	2	\$20.75
27-3040	Writers and Editors	0.51	17	0	\$19.34
27-4020	Photographers	0.80	12	(3)	\$13.10
29-0000	Healthcare Practitioners and Technical Occupations	1.08	961	83	\$29.37
29-1010	Chiropractors	1.49	<10	Insf. Data	Insf. Data
29-1020	Dentists	0.92	15	0	\$77.84
29-1040	Optometrists	1.32	<10	Insf. Data	Insf. Data
29-1050	Pharmacists	0.99	31	4	\$56.29
29-1060	Physicians and Surgeons	0.54	40	(14)	\$88.03
29-1120	Therapists	0.83	60	4	\$30.23
29-1140	Registered Nurses	1.13	337	17	\$28.79
29-1160	Nurse Midwives	1.88	<10	Insf. Data	Insf. Data
29-1170	Nurse Practitioners	0.84	13	1	\$40.22
29-2010	Clinical Laboratory Technologists and Technicians	0.41	14	(4)	\$25.20
29-2020	Dental Hygienists	1.30	28	2	\$29.77
29-2030	Diagnostic Related Technologists and Technicians	0.46	18	(7)	\$29.23
29-2040	Emergency Medical Technicians and Paramedics	2.98	75	56	\$14.40
29-2050	Health Practitioner Support Technologists and Technicians	1.61	124	34	\$13.80
29-2060	Licensed Practical and Licensed Vocational Nurses	1.43	109	0	\$20.06
29-2070	Medical Records and Health Information Technicians	1.13	24	1	\$17.01

29-2080	Opticians, Dispensing	1.07	<10	Insf. Data	Insf. Data
31-0000	Healthcare Support Occupations	1.71	775	108	\$12.57
31-1010	Nursing, Psychiatric, and Home Health Aides	2.32	623	112	\$12.12
31-9010	Massage Therapists	0.80	14	Insf. Data	\$14.83
31-9090	Miscellaneous Healthcare Support Occupations	0.86	128	(9)	\$13.53
33-0000	Protective Service Occupations	0.80	293	14	\$17.90
33-1010	First-Line Supervisors of Law Enforcement Workers	1.48	22	1	\$28.28
33-1020	First-Line Supervisors of Fire Fighting and Prevention Workers	3.41	21	1	\$25.04
33-2010	Firefighters	1.48	50	2	\$15.51
33-3010	Bailiffs, Correctional Officers, and Jailers	0.53	25	2	\$13.96
33-3050	Police Officers	1.22	88	4	\$19.65
33-9010	Animal Control Workers	2.09	<10	Insf. Data	Insf. Data
33-9030	Security Guards and Gaming Surveillance Officers	0.34	43	4	\$12.89
33-9090	Miscellaneous Protective Service Workers	0.65	27	0	\$10.50
35-0000	Food Preparation and Serving Related Occupations	0.83	1,135	(8)	\$9.95
35-1010	Supervisors of Food Preparation and Serving Workers	1.08	121	6	\$12.63
35-2010	Cooks	1.22	306	(4)	\$9.87
35-2020	Food Preparation Workers	1.22	115	6	\$9.33
35-3010	Bartenders	0.25	16	(8)	\$9.74
35-3020	Fast Food and Counter Workers	0.61	246	10	\$9.29
35-3030	Waiters and Waitresses	0.78	210	(13)	\$9.91
35-3040	Food Servers, Nonrestaurant	0.51	14	(1)	\$10.76
35-9010	Dining Room and Cafeteria Attendants and Bartender Helpers	0.94	42	(1)	\$9.24
35-9020	Dishwashers	0.68	37	(2)	\$9.15
35-9030	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	0.59	25	(2)	\$9.67
37-0000	Building and Grounds Cleaning and Maintenance Occupations	0.69	430	34	\$11.15
37-1010	First-Line Supervisors of Building and Grounds Cleaning and Maintenance Workers	0.70	26	0	\$15.24
37-2010	Building Cleaning Workers	0.73	311	28	\$10.98
37-3010	Grounds Maintenance Workers	0.63	92	7	\$10.54
39-0000	Personal Care and Service Occupations	1.05	699	(51)	\$10.81
39-1020	First-Line Supervisors of Personal Service Workers	1.21	27	(2)	\$17.44
39-2010	Animal Trainers	1.02	<10	Insf. Data	Insf. Data
39-2020	Nonfarm Animal Caretakers	0.64	16	(1)	\$10.60
39-4010	Embalmers	2.21	<10	Insf. Data	Insf. Data
39-4020	Funeral Attendants	1.24	<10	Insf. Data	Insf. Data
39-4030	Morticians, Undertakers, and Funeral Directors	1.53	<10	Insf. Data	Insf. Data
39-5010	Barbers, Hairdressers, Hairstylists and Cosmetologists	0.73	58	(5)	\$11.81

39-5090	Miscellaneous Personal Appearance Workers	0.53	12	Insf. Data	\$10.97
39-9010	Childcare Workers	1.28	168	(7)	\$8.89
39-9020	Personal Care Aides	1.42	281	(39)	\$10.13
39-9030	Recreation and Fitness Workers	1.03	73	2	\$12.88
39-9040	Residential Advisors	1.82	24	(1)	\$10.91
41-0000	Sales and Related Occupations	0.83	1,381	71	\$16.44
41-1010	First-Line Supervisors of Sales Workers	1.01	189	4	\$17.20
41-2010	Cashiers	0.96	359	23	\$9.75
41-2020	Counter and Rental Clerks and Parts Salespersons	0.69	51	2	\$14.33
41-2030	Retail Salespersons	0.80	395	(7)	\$12.92
41-3020	Insurance Sales Agents	0.76	47	8	\$23.07
41-3030	Securities, Commodities, and Financial Services Sales Agents	0.31	11	(2)	\$40.88
41-3090	Miscellaneous Sales Representatives, Services	0.63	63	14	\$24.34
41-4010	Sales Representatives, Wholesale and Manufacturing	0.99	190	31	\$31.20
41-9020	Real Estate Brokers and Sales Agents	0.53	28	(6)	\$19.89
41-9040	Telemarketers	0.66	16	Insf. Data	\$13.61
41-9090	Miscellaneous Sales and Related Workers	0.82	16	(6)	\$12.80
43-0000	Office and Administrative Support Occupations	0.97	2,407	279	\$14.68
43-1010	First-Line Supervisors of Office and Administrative Support Workers	0.79	123	10	\$22.05
43-2010	Switchboard Operators, Including Answering Service	1.58	17	5	\$11.70
43-3010	Bill and Account Collectors	0.65	22	3	\$14.01
43-3020	Billing and Posting Clerks	0.75	41	2	\$13.73
43-3030	Bookkeeping, Accounting, and Auditing Clerks	0.93	171	2	\$15.78
43-3050	Payroll and Timekeeping Clerks	1.36	26	3	\$16.25
43-3070	Tellers	1.45	77	(2)	\$9.99
43-4030	Court, Municipal, and License Clerks	0.88	12	0	\$14.37
43-4050	Customer Service Representatives	1.12	313	105	\$13.55
43-4070	File Clerks	1.22	20	0	\$11.57
43-4080	Hotel, Motel, and Resort Desk Clerks	0.45	12	Insf. Data	\$9.90
43-4110	Interviewers, Except Eligibility and Loan	2.03	46	9	\$12.02
43-4120	Library Assistants, Clerical	1.71	22	3	\$10.68
43-4130	Loan Interviewers and Clerks	0.58	13	(1)	\$14.63
43-4140	New Accounts Clerks	3.47	18	0	\$12.98
43-4150	Order Clerks	0.79	16	3	\$14.83
43-4160	Human Resources Assistants, Except Payroll and Timekeeping	0.86	14	2	\$16.65
43-4170	Receptionists and Information Clerks	1.12	123	5	\$11.83
43-4190	Miscellaneous Information and Record Clerks	1.48	32	5	\$12.51

43-5030	Dispatchers	0.86	28	4	\$15.08
43-5040	Meter Readers, Utilities	1.12	<10	Insf. Data	Insf. Data
43-5050	Postal Service Workers	0.89	46	(5)	\$22.11
43-5060	Production, Planning, and Expediting Clerks	2.63	90	20	\$24.71
43-5070	Shipping, Receiving, and Traffic Clerks	1.64	118	21	\$14.86
43-5080	Stock Clerks and Order Fillers	1.15	236	22	\$11.61
43-6010	Secretaries and Administrative Assistants	0.91	399	24	\$15.48
43-9020	Data Entry and Information Processing Workers	0.45	15	0	\$14.18
43-9060	Office Clerks, General	0.79	275	27	\$12.93
43-9190	Miscellaneous Office and Administrative Support Workers	0.46	17	5	\$15.59
45-0000	Farming, Fishing, and Forestry Occupations	0.80	101	27	\$12.63
45-2090	Miscellaneous Agricultural Workers	0.91	93	28	\$12.22
47-0000	Construction and Extraction Occupations	1.23	903	17	\$16.91
47-1010	First-Line Supervisors of Construction Trades and Extraction Workers	1.16	76	(1)	\$23.34
47-2030	Carpenters	1.18	127	14	\$15.38
47-2040	Carpet, Floor, and Tile Installers and Finishers	1.18	16	2	\$15.05
47-2050	Cement Masons, Concrete Finishers, and Terrazzo Workers	2.13	41	(1)	\$21.86
47-2060	Construction Laborers	1.14	157	9	\$12.94
47-2070	Construction Equipment Operators	1.64	74	(1)	\$16.93
47-2110	Electricians	1.07	76	(2)	\$21.82
47-2130	Insulation Workers	1.08	<10	Insf. Data	Insf. Data
47-2140	Painters and Paperhangers	1.18	51	(5)	\$15.00
47-2150	Pipelayers, Plumbers, Pipefitters, and Steamfitters	0.59	32	(3)	\$18.97
47-2180	Roofers	6.05	96	(9)	\$15.69
47-2210	Sheet Metal Workers	2.84	44	5	\$16.46
47-3010	Helpers, Construction Trades	1.13	29	1	\$12.14
47-4060	Rail-Track Laying and Maintenance Equipment Operators	4.12	<10	Insf. Data	Insf. Data
47-5010	Derrick, Rotary Drill, and Service Unit Operators, Oil, Gas, and Mining	1.20	10	Insf. Data	Insf. Data
47-5030	Explosives Workers, Ordnance Handling Experts, and Blasters	1.72	<10	Insf. Data	Insf. Data
47-5070	Roustabouts, Oil and Gas	1.35	<10	Insf. Data	Insf. Data
47-5090	Miscellaneous Extraction Workers	2.51	<10	Insf. Data	Insf. Data
49-0000	Installation, Maintenance, and Repair Occupations	1.09	678	81	\$19.47
49-1010	First-Line Supervisors of Mechanics, Installers, and Repairers	1.13	54	5	\$27.56
49-2090	Miscellaneous Electrical and Electronic Equipment Mechanics, Installers, and Repairers	0.74	20	2	\$21.48
49-3020	Automotive Technicians and Repairers	0.83	84	(1)	\$16.56
49-3030	Bus and Truck Mechanics and Diesel Engine Specialists	0.83	23	2	\$17.94
49-3040	Heavy Vehicle and Mobile Equipment Service Technicians and Mechanics	1.82	37	3	\$22.38

49-3090	Miscellaneous Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1.27	18	3	\$11.78
49-9020	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	0.65	22	(2)	\$19.04
49-9040	Industrial Machinery Installation, Repair, and Maintenance Workers	3.23	161	43	\$23.52
49-9050	Line Installers and Repairers	0.42	10	Insf. Data	Insf. Data
49-9070	Maintenance and Repair Workers, General	1.12	171	17	\$15.70
49-9080	Wind Turbine Service Technicians	1.46	<10	Insf. Data	Insf. Data
49-9090	Miscellaneous Installation, Maintenance, and Repair Workers	0.97	43	5	\$15.64
51-0000	Production Occupations	2.27	2,216	334	\$17.72
51-1010	First-Line Supervisors of Production and Operating Workers	2.23	143	25	\$27.67
51-2010	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	3.28	15	Insf. Data	\$22.71
51-2020	Electrical, Electronics, and Electromechanical Assemblers	0.74	21	5	\$16.99
51-2030	Engine and Other Machine Assemblers	1.40	<10	Insf. Data	Insf. Data
51-2040	Structural Metal Fabricators and Fitters	6.47	54	11	\$24.14
51-2090	Miscellaneous Assemblers and Fabricators	3.72	540	50	\$15.07
51-3010	Bakers	1.17	24	(2)	\$11.76
51-3020	Butchers and Other Meat, Poultry, and Fish Processing Workers	0.29	12	(3)	\$14.84
51-4010	Computer Control Programmers and Operators	3.91	71	23	\$21.44
51-4020	Forming Machine Setters, Operators, and Tenders, Metal and Plastic	2.68	34	5	\$16.86
51-4030	Machine Tool Cutting Setters, Operators, and Tenders, Metal and Plastic	3.60	126	14	\$16.67
51-4040	Machinists	2.41	101	23	\$18.26
51-4050	Metal Furnace Operators, Tenders, Pourers, and Casters	2.08	<10	Insf. Data	Insf. Data
51-4060	Model Makers and Patternmakers, Metal and Plastic	3.46	<10	Insf. Data	Insf. Data
51-4070	Molders and Molding Machine Setters, Operators, and Tenders, Metal and Plastic	0.95	15	1	\$14.77
51-4080	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	3.78	42	7	\$14.31
51-4110	Tool and Die Makers	4.90	38	8	\$23.96
51-4120	Welding, Soldering, and Brazing Workers	5.15	247	41	\$17.66
51-4190	Miscellaneous Metal Workers and Plastic Workers	5.18	53	1	\$26.48
51-5110	Printing Workers	0.50	14	(1)	\$15.43
51-6050	Tailors, Dressmakers, and Sewers	1.39	<10	Insf. Data	Insf. Data
51-7010	Cabinetmakers and Bench Carpenters	8.35	93	24	\$13.79
51-7020	Furniture Finishers	7.41	15	4	\$16.11
51-7030	Model Makers and Patternmakers, Wood	3.80	<10	Insf. Data	Insf. Data
51-7040	Woodworking Machine Setters, Operators, and Tenders	8.44	113	40	\$13.20
51-7090	Miscellaneous Woodworkers	3.49	<10	Insf. Data	Insf. Data
51-8030	Water and Wastewater Treatment Plant and System Operators	0.87	10	0	\$16.31
51-8090	Miscellaneous Plant and System Operators	1.09	12	(4)	\$27.52
51-9020	Crushing, Grinding, Polishing, Mixing, and Blending Workers	2.22	44	11	\$14.43

51-9030	Cutting Workers	1.36	12	0	\$15.19
51-9040	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	2.09	16	1	\$16.48
51-9050	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders	1.35	<10	Insf. Data	Insf. Data
51-9060	Inspectors, Testers, Sorters, Samplers, and Weighers	2.37	129	25	\$23.91
51-9110	Packaging and Filling Machine Operators and Tenders	0.27	11	(1)	\$13.28
51-9120	Painting Workers	3.05	53	8	\$15.20
51-9190	Miscellaneous Production Workers	0.82	77	3	\$13.58
53-0000	Transportation and Material Moving Occupations	0.75	803	92	\$15.94
53-1020	First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	0.73	14	2	\$19.45
53-1030	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	1.06	23	2	\$24.91
53-3010	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	7.06	15	Insf. Data	\$11.48
53-3020	Bus Drivers	0.30	21	(1)	\$12.65
53-3030	Driver/Sales Workers and Truck Drivers	0.88	298	32	\$15.68
53-3040	Taxi Drivers and Chauffeurs	0.55	17	1	\$11.19
53-4010	Locomotive Engineers and Operators	5.29	28	3	\$25.27
53-4020	Railroad Brake, Signal, and Switch Operators	5.29	12	1	\$22.36
53-4030	Railroad Conductors and Yardmasters	5.21	27	3	\$23.88
53-4090	Miscellaneous Rail Transportation Workers	3.34	<10	Insf. Data	Insf. Data
53-6050	Transportation Inspectors	2.19	<10	Insf. Data	Insf. Data
53-6060	Transportation Attendants, Except Flight Attendants	1.43	<10	Insf. Data	Insf. Data
53-7010	Conveyor Operators and Tenders	1.40	<10	Insf. Data	Insf. Data
53-7020	Crane and Tower Operators	2.09	10	Insf. Data	\$22.31
53-7050	Industrial Truck and Tractor Operators	1.22	72	14	\$15.25
53-7060	Laborers and Material Movers, Hand	0.51	202	18	\$11.88
53-7070	Pumping Station Operators	1.21	<10	Insf. Data	Insf. Data
55-0000	Military occupations	0.66	136	(11)	\$15.97
55-9990	Military occupations	0.66	136	(11)	\$15.97
Total			16,434	1,212	\$18.01

Source: EMSI 2017, Garner Economics

APPENDIX 3: 2016 HARVEY COUNTY, KANSAS INDUSTRY DETAILS

Specialized industries are highlighted **light blue** for location quotients greater than 1.20 and **orange** for location quotients above 5.

NAICS	Description	2016 Location Quotient	2016 Jobs	2011– 2016 Change	Average Wages 2016
1100	Crop and Animal Production	1.19	241	81	\$27,720
1110	Crop Production	1.28	113	18	\$27,568
1120	Animal Production and Aquaculture	2.07	94	64	\$29,582
1132	Forest Nurseries and Gathering of Forest Products	6.41	<10	Insf. Data	Insf. Data
1151	Support Activities for Crop Production	0.62	31	1	\$23,389
2100	Mining, Quarrying, and Oil and Gas Extraction	0.41	30	9	\$61,145
2111	Oil and Gas Extraction	1.18	23	8	\$64,722
2200	Utilities	0.25	14	Insf. Data	\$132,627
2211	Electric Power Generation, Transmission and Distribution	0.31	13	Insf. Data	\$145,000
2300	Construction	1.04	916	(21)	\$40,321
2361	Residential Building Construction	0.79	95	1	\$26,872
2362	Nonresidential Building Construction	0.56	49	18	\$36,659
2373	Highway, Street, and Bridge Construction	5.26	179	(44)	\$52,020
2381	Foundation, Structure, and Building Exterior Contractors	1.59	170	(39)	\$51,576
2382	Building Equipment Contractors	0.58	135	(17)	\$39,241
2383	Building Finishing Contractors	1.24	158	14	\$26,408
2389	Other Specialty Trade Contractors	1.16	120	48	\$37,901
3100	Manufacturing	3.01	3,942	756	\$48,416
3219	Other Wood Product Manufacturing	2.32	57	11	\$37,427
3231	Printing and Related Support Activities	0.66	33	(4)	\$42,786
3251	Basic Chemical Manufacturing	1.06	16	Insf. Data	\$60,008
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	10.37	39	Insf. Data	\$33,773
3261	Plastics Product Manufacturing	0.95	56	14	\$70,356
3262	Rubber Product Manufacturing	5.00	70	(9)	\$34,662
3273	Cement and Concrete Product Manufacturing	9.13	181	32	\$39,378
3311	Iron and Steel Mills and Ferroalloy Manufacturing	7.38	65	18	\$53,870
3323	Architectural and Structural Metals Manufacturing	2.53	98	9	\$33,288
3324	Boiler, Tank, and Shipping Container Manufacturing	1.29	13	2	\$42,318
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	4.16	160	75	\$40,779
3329	Other Fabricated Metal Product Manufacturing	3.62	104	(2)	\$35,608

3331	Agriculture, Construction, and Mining Machinery Manufacturing	95.65	2,193	428	\$55,327
3339	Other General Purpose Machinery Manufacturing	7.49	207	56	\$59,547
3353	Electrical Equipment Manufacturing	0.78	12	Insf. Data	\$59,772
3364	Aerospace Product and Parts Manufacturing	1.93	99	Insf. Data	\$42,376
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	18.57	506	167	\$28,078
4200	Wholesale Trade	0.37	232	(26)	\$45,849
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	0.69	25	9	\$32,130
4233	Lumber and Other Construction Materials Merchant Wholesalers	1.08	25	(5)	\$35,390
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.35	25	(8)	\$55,960
4239	Miscellaneous Durable Goods Merchant Wholesalers	0.35	11	(7)	\$32,511
4245	Farm Product Raw Material Merchant Wholesalers	1.64	13	(26)	\$55,432
4247	Petroleum and Petroleum Products Merchant Wholesalers	1.96	20	4	\$29,436
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	1.39	49	3	\$45,512
4251	Wholesale Electronic Markets and Agents and Brokers	0.51	49	28	\$58,590
4400	Retail Trade	0.98	1,682	52	\$22,844
4411	Automobile Dealers	0.86	116	8	\$38,533
4412	Other Motor Vehicle Dealers	1.36	22	9	\$19,310
4413	Automotive Parts, Accessories, and Tire Stores	0.97	57	9	\$24,140
4421	Furniture Stores	1.15	28	3	\$27,236
4422	Home Furnishings Stores	0.79	22	(4)	\$20,780
4431	Electronics and Appliance Stores	0.25	14	(12)	\$24,988
4441	Building Material and Supplies Dealers	1.48	174	43	\$30,101
4442	Lawn and Garden Equipment and Supplies Stores	3.33	57	(30)	\$47,977
4451	Grocery Stores	1.16	330	44	\$17,207
4452	Specialty Food Stores	2.79	73	(9)	\$16,843
4453	Beer, Wine, and Liquor Stores	2.32	39	4	\$13,062
4461	Health and Personal Care Stores	0.43	48	8	\$28,918
4471	Gasoline Stations	1.18	114	31	\$18,001
4481	Clothing Stores	1.15	124	(16)	\$12,363
4483	Jewelry, Luggage, and Leather Goods Stores	0.61	10	Insf. Data	\$19,913
4511	Sporting Goods, Hobby, and Musical Instrument Stores	0.70	42	1	\$9,864
4529	Other General Merchandise Stores	1.64	320	(34)	\$24,567
4531	Florists	2.07	17	0	\$11,354
4533	Used Merchandise Stores	0.94	21	Insf. Data	\$11,285
4539	Other Miscellaneous Store Retailers	0.62	24	(3)	\$26,569
4800	Transportation and Warehousing	0.59	328	54	\$62,224
4821	Rail Transportation	5.78	150	17	\$82,819

4841	General Freight Trucking	0.56	70	26	\$44,117
4842	Specialized Freight Trucking	0.37	18	(3)	\$33,008
4853	Taxi and Limousine Service	0.64	12	(2)	\$9,544
4862	Pipeline Transportation of Natural Gas	3.64	11	11	\$74,791
4881	Support Activities for Air Transportation	0.54	11	(5)	\$44,389
4885	Freight Transportation Arrangement	0.54	13	Insf. Data	\$41,399
4931	Warehousing and Storage	0.35	32	32	\$63,457
5100	Information	0.14	44	(11)	\$36,489
5111	Newspaper, Periodical, Book, and Directory Publishers	0.41	18	(3)	\$20,247
5171	Wired Telecommunications Carriers	0.26	16	(4)	\$50,491
5200	Finance and Insurance	0.63	400	(5)	\$43,399
5221	Depository Credit Intermediation	1.35	237	(2)	\$39,093
5231	Securities and Commodity Contracts Intermediation and Brokerage	0.29	14	(6)	\$82,178
5239	Other Financial Investment Activities	0.24	13	(1)	\$37,783
5241	Insurance Carriers	0.13	17	Insf. Data	\$44,077
5242	Agencies, Brokerages, and Other Insurance Related Activities	0.83	111	0	\$48,927
5300	Real Estate and Rental and Leasing	0.44	119	(29)	\$25,078
5311	Lessors of Real Estate	0.36	30	3	\$27,971
5312	Offices of Real Estate Agents and Brokers	0.47	21	(12)	\$21,219
5313	Activities Related to Real Estate	0.66	54	(14)	\$24,484
5400	Professional, Scientific, and Technical Services	0.34	361	4	\$42,229
5411	Legal Services	0.34	48	(2)	\$49,552
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	0.80	97	(4)	\$30,053
5413	Architectural, Engineering, and Related Services	0.33	52	25	\$53,270
5414	Specialized Design Services	0.38	11	Insf. Data	\$28,827
5415	Computer Systems Design and Related Services	0.18	39	1	\$50,277
5416	Management, Scientific, and Technical Consulting Services	0.17	28	(3)	\$88,107
5418	Advertising, Public Relations, and Related Services	0.21	12	Insf. Data	\$44,402
5419	Other Professional, Scientific, and Technical Services	0.87	74	(22)	\$25,533
5500	Management of Companies and Enterprises	0.17	40	4	\$51,911
5511	Management of Companies and Enterprises	0.17	40	4	\$51,911
5600	Administrative and Support and Waste Management and Remediation Services	0.37	375	95	\$18,263
5611	Office Administrative Services	0.23	12	(5)	\$53,175
5613	Employment Services	0.04	16	(9)	\$38,242
5614	Business Support Services	2.03	206	129	\$16,295
5617	Services to Buildings and Dwellings	0.43	124	12	\$13,702
5621	Waste Collection	0.74	14	(25)	\$32,097

6100	Educational Services	1.77	742	31	\$18,382
6111	Elementary and Secondary Schools	1.33	151	(142)	\$10,030
6112	Junior Colleges	38.27	289	55	\$21,014
6113	Colleges, Universities, and Professional Schools	1.33	268	110	\$21,159
6116	Other Schools and Instruction	0.54	32	9	\$8,016
6200	Health Care and Social Assistance	1.48	3,035	228	\$35,401
6211	Offices of Physicians	0.49	131	(99)	\$48,748
6212	Offices of Dentists	1.09	109	4	\$45,986
6213	Offices of Other Health Practitioners	0.95	96	(1)	\$53,094
6214	Outpatient Care Centers	0.79	69	Insf. Data	\$35,933
6216	Home Health Care Services	0.13	20	(59)	\$20,571
6219	Other Ambulatory Health Care Services	2.87	96	82	\$44,864
6221	General Medical and Surgical Hospitals	0.49	235	(137)	\$98,210
6222	Psychiatric and Substance Abuse Hospitals	67.38	791	455	\$30,455
6231	Nursing Care Facilities (Skilled Nursing Facilities)	1.44	247	(81)	\$28,242
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	0.58	37	Insf. Data	\$32,675
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	8.42	780	101	\$27,751
6239	Other Residential Care Facilities	3.10	53	(47)	\$23,037
6241	Individual and Family Services	0.27	66	(104)	\$15,136
6243	Vocational Rehabilitation Services	3.31	120	42	\$15,903
6244	Child Day Care Services	1.42	183	(11)	\$14,163
7100	Arts, Entertainment, and Recreation	0.32	88	(22)	\$18,898
7113	Promoters of Performing Arts, Sports, and Similar Events	1.12	17	(5)	\$24,177
7115	Independent Artists, Writers, and Performers	0.53	17	1	\$13,497
7121	Museums, Historical Sites, and Similar Institutions	1.31	22	11	\$22,181
7139	Other Amusement and Recreation Industries	0.19	27	(26)	\$17,360
7200	Accommodation and Food Services	0.73	1,023	2	\$11,504
7211	Traveler Accommodation	0.31	60	9	\$11,019
7223	Special Food Services	0.34	28	16	\$19,094
7225	Restaurants and Other Eating Places	0.87	936	(1)	\$11,310
8100	Other Services (except Public Administration)	0.86	680	27	\$20,579
8111	Automotive Repair and Maintenance	0.88	104	(4)	\$28,287
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	2.75	71	26	\$34,444
8114	Personal and Household Goods Repair and Maintenance	1.01	17	3	\$13,526
8121	Personal Care Services	0.74	96	5	\$17,336
8122	Death Care Services	1.20	18	3	\$39,557



8131	Religious Organizations	1.54	278	8	\$16,293
8134	Civic and Social Organizations	0.30	13	Insf. Data	\$15,895
8139	Business, Professional, Labor, Political, and Similar Organizations	0.40	18	2	\$23,201
8141	Private Households	0.41	39	13	\$8,850
9000	Government	0.85	2,141	(27)	\$30,953
9011	Federal Government, Civilian	0.23	69	(6)	\$48,678
9012	Federal Government, Military	0.66	136	(11)	\$20,182
9029	State Government, Excluding Education and Hospitals	0.27	64	18	\$36,715
9036	Education and Hospitals (Local Government)	1.24	1,099	(51)	\$29,990
9039	Local Government, Excluding Education and Hospitals	1.32	771	22	\$32,177
TOTAL			16,434	1,212	\$34,598

Source: EMSI 2017, Garner Economics