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# An Economic Development Situation Analysis for Topeka and Shawnee County, Kansas

Prepared for

City of Topeka & Shawnee County





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## INTRODUCTION

In June 2015, the Joint Economic Development Organization (JEDO) retained Garner Economics, LLC to conduct an analysis of how economic development is conducted in Topeka and Shawnee County and then to make recommendations on how to enhance its economic development service delivery process.

The Garner Economics team, in partnership with Brand Acceleration, approached the objectives outlined in the RFP's scope of work in three areas, which are designed to work in tandem with each other.

This first area of work is the **ASSESSMENT** of Topeka/Shawnee County's current competitive position and local and external perceptions of the market. The assessment reviewed JEDO's current organizational structure and relationships with other economic development organizations, with a special focus on how that structure will allow it to attain the goals of the current industry target strategy. This assessment followed the desired elements outlined in

the RFP, as well as other areas we deemed appropriate given our site-selection expertise.

This *Phase 1 Situation Analysis* is the first of two reports that will be provided to JEDO. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I (see chart below). This first phase informs our process and allows the Garner Economics team to create the final deliverable—the **RECOMMENDATIONS** for actions JEDO must take (or advocate that others should lead) to fully leverage the community's assets or mitigate its challenges. These recommendations will look to improve the competitiveness and economic growth potential of Topeka/Shawnee County as well as the economic development service delivery of JEDO and *GO Topeka* (as JEDO's current economic development agent). The recommendations will also address JEDO's relationships with, and interactions among, the other economic development entities in the area and the local populous.

## PROJECT PHASES

Assessment	Recommendations	Implementation Strategy
<p>Evaluate Topeka/Shawnee County's competitive position from an economic development perspective</p> <ul style="list-style-type: none"> <li>Organizational assessment</li> <li>Best practice benchmarking</li> <li>Incentive analysis</li> <li>Marketing audit</li> </ul> <p>Supplement existing work and solicit public input through focus groups, stakeholder interviews, and an electronic survey and compare JEDO to peer EDOs and other best practices.</p>	<p>Position JEDO to achieve success through actionable, short- and long-term recommendations, including (3-5 years) addressing:</p> <ul style="list-style-type: none"> <li>Economic development mission and vision</li> <li>Effective relationships with other economic development organizations</li> <li>Areas where Topeka/Shawnee County have gaps in programs and policies that impact the region's business climate</li> <li>Policies to enhance investment</li> <li>Marketing and messaging to tell the value of Topeka/Shawnee County as a business location</li> </ul>	<p>High-level implementation plans for actionable items, including:</p> <ul style="list-style-type: none"> <li>Economic development service delivery</li> <li>Incentive policies</li> <li>Marketing</li> <li>Metrics and organizational monitoring</li> </ul> <p><b>Presentation of the final report.</b></p>

## METHODOLOGY

Because Topeka and Shawnee County must compete with other geographies, it is important to understand where these geographies stand compared to key competitors. To conduct such benchmarking, Garner Economics evaluated key demographic and economic indicators for the City and County. These indicators were compared to statewide and national-level data, as well as Linn County, Iowa; Minnehaha County, South Dakota; and Hamilton County, Tennessee. The counties selected comprise the cities of Cedar Rapids, Iowa; Sioux Falls, South Dakota; and Chattanooga, Tennessee. The communities were selected based on feedback from JEDO board members, GO Topeka, and Garner Economics. Communities that the Topeka region competes with, aspire to be like, or can learn from (in the case of Chattanooga), led to the decision on the selection of these benchmark cities. The variables against which Topeka, Shawnee County, and the other benchmark counties, the nation, and the state were compared are listed to the right.

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies that had similar data for all benchmarks. In all cases, the original and most current available data as of August 2015 are used. Garner Economics conducted all unique calculations and computations from the original data.

The main source for most demographic information is the US Census Bureau's American Community Survey (ACS), an ongoing survey reporting annual data. Data for this survey is released in the fall for the preceding year. In this report, 2013 was the latest data available for all benchmarks. The exceptions to this are a population estimate, which utilizes current data on births, deaths, and migration to calculate population change through the Census Bureau's Population Estimates Program. This data set has 2014 data reflecting population growth annually.

### Variables for Benchmarking

- Population Growth
- Sources of New Residents
- Population by Race and Hispanic Origin
- Age
- Crime
- Educational Attainment
- Population In-Migration by Educational Attainment
- Labor Force and Participation
- Employment Change
- Self-Employment
- Median Earnings by Self-Employment
- Startup Firms
- Estimated Average Weekly Wage
- Household Income
- Per Capita Income
- Poverty
- Poverty Rates by Educational Attainment
- Median Earnings by Educational Attainment
- Cost of Living
- Broadband

Crime data is compiled and reported in the FBI's Uniform Crime Report using data from reporting law enforcement agencies. The report for 2013, released in November of 2014, is the latest full publication with data at the county level. Each benchmark used county data combined with the primary city data to reflect crime in both jurisdictions.

Labor Force and employment data come from several sources. The Census Bureau's ACS program has a wealth of information on labor

force participation to the county and city level, including detailed family and income data. Additional labor force series are collected through the Bureau of Labor Statistics (BLS) through their Local Area Unemployment Statistics (LAUS) and Quarterly Census of Employment and Wages (QCEW). LAUS data are published monthly, and this current data was used for unemployment rates as well as Labor Force size analysis. The Quarterly Census is released quarterly with some delay in reporting, however the latest quarter has 2014 annual average data, which was used for the report to the county level as city data is not reported. This data, reported by companies, is used to show employment and wages based on those working in the jurisdictions.

The US Census Bureau offers significant business data within its Business Dynamics Statistics showing the number of startups. Data is

released annually; however, it is several years behind the current year and 2012 is the latest release that could be used.

Cost-of-Living Index, with data collection performed at the local level, was used as an indicator of cost to live a mid-level management quality of life in each community. This is reported quarterly and is usually released six months after the data is collected. The National Telecommunications and Information Administration is an excellent resource to benchmark Internet access and speed uniformly across communities. This information is dated June 2014 and is updated every six months.

Please see the following tables for detailed information used for Figures and Tables throughout the report. Sources listed provide base data for Garner Economics to utilize for analysis.

## CHAPTER 1: COMMUNITY ENGAGEMENT

Garner Economics held six focus group sessions and one public listening session with JEDO stakeholders and members of the Topeka and Shawnee County communities. The purpose of the engagement was to solicit perceptions and opinions on the business climate of the City of Topeka and Shawnee County; the effectiveness of JEDO and its primary agent, GO Topeka; and to inform recommendations to improve economic development service delivery in the area. In conjunction with the focus groups, an electronic survey was distributed to the general population.

### Focus Group Methodology

Specifically, questions posed during the focus groups sought to understand how the community sees the work of JEDO and GO Topeka, JEDO's primary economic development agent. Additionally, questions were asked to gauge the community's thoughts on the area's attractiveness to companies and challenges or weaknesses the community needs to overcome to be a more attractive location for business investment (including existing businesses).

Members of JEDO identified individuals to invite to participate in the following six focus groups:

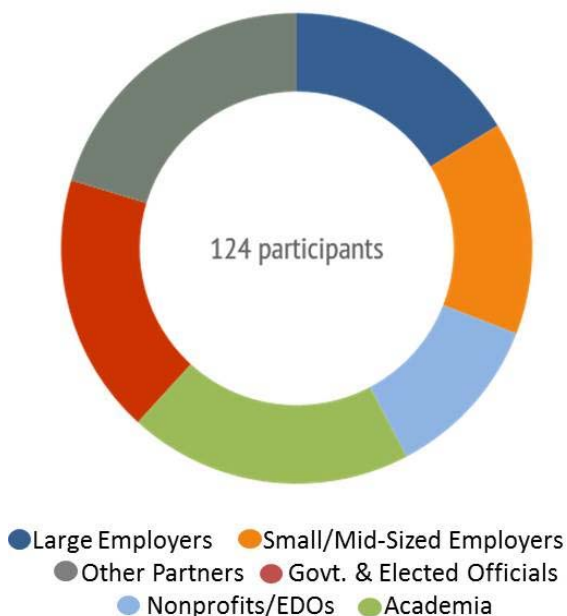
- Large employers (more than 200 employees),
- Small/mid-size employers (less than 200 employees),
- Nonprofits and other economic development groups,
- Academia and workforce development entities,
- Local government officials and staff, and
- Other community groups and individual activists.

A total of 124 people participated in the six groups.

Each group lasted no more than 60 minutes. By nature of the invitation process that was followed and the time and personal investment of each participant in the process, feedback from the focus group participants was robust, and focus group participants likely had a much deeper knowledge of the economic development process and programs than survey respondents.

A list of participants by focus group and the questions asked in each of the groups are included in Appendices A and B, respectively.

Participants by Group



### Electronic Survey and Public Listening Session Methodology

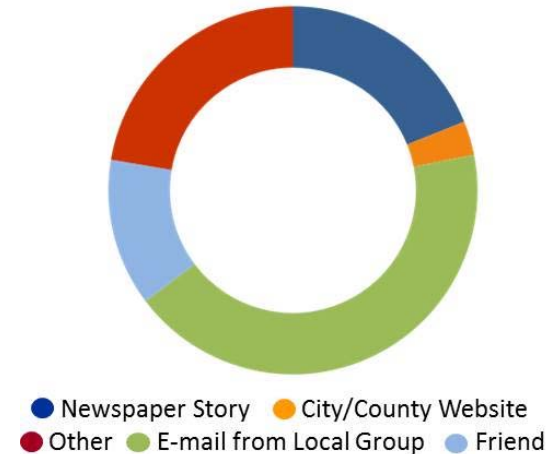
The electronic survey was built using the responses provided in the focus groups. The electronic survey was used to validate or refute major themes presented within the focus groups and uncover additional community responses. The survey was open from September 1-10, 2015. A total of 707 people completed the survey. The majority of those responding to the survey (73 percent) have lived in Topeka and Shawnee County for at least 15 years. Moreover, the respondents tended to be older, with only 7 percent of the respondents being less than 30 years of age.

A Public Listening Session was held as a third way of soliciting community comments. Participants in the listening session were asked to focus their remarks on answering the questions below. Participants were asked to limit their comments to no more than three minutes. There were 12 individuals that gave comments in the Public Listening Session. A list of speakers is included in Appendix C.

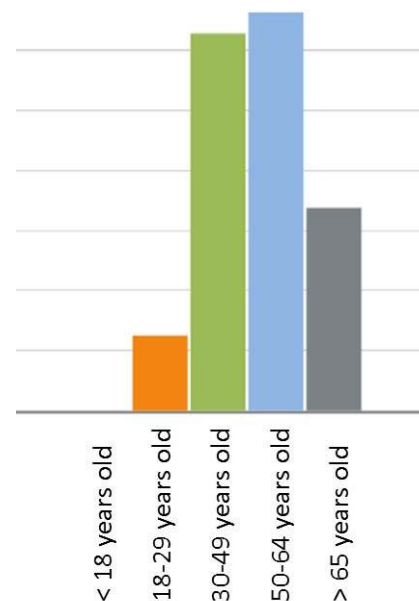
- What are some of the biggest obstacles that inhibit Topeka and Shawnee County's ability to attract, expand, grow, or retain businesses and investment?
- What are your current perceptions of, or past experiences with, economic development efforts to attract and retain businesses and to assist entrepreneurs in Topeka and Shawnee County? How could these efforts be improved?

The survey instrument is included in Appendix D.

### How Respondents Learned about the Survey



### Respondents Age Group



## Key Findings

The following section summarizes the input received through these tools. Given that the task of this project is to identify ways to improve the economic development service delivery in Topeka and Shawnee County, more emphasis below is placed on those topics and comments that help inform such recommendations. The quotations, statements, and summary of statements provided herein represent the feedback and perspectives provided by focus group participants and survey respondents. They are opinions and not necessarily facts.

**The six focus groups were consistent in their individual assessments of economic development service delivery in the area and the overall business climate.** The focus group consisting of the staffs of local government offices and elected officials tended (not surprisingly) to rank the business climate in both Topeka and Shawnee County higher than the other groups. In all other areas, the responses from the groups were relatively aligned.

**Electronic survey responses very closely mirrored the sentiments expressed by the focus groups.** Given the nature of using the responses garnered in the focus group to populate the multiple choice responses provided in the electronic survey, the consulting team also depended on the “other” comments and open-ended text commentary of the survey to discern areas of difference in opinion. The proportion of negative comments regarding JEDO and GO Topeka as compared to supporters and those with constructive feedback was fairly consistent. Survey respondents remarked frequently that the options provided to describe JEDO and GO Topeka were skewed toward the negative and several provided comments to show the positive qualities of these organizations.

The shared sentiments among the focus groups and survey were:

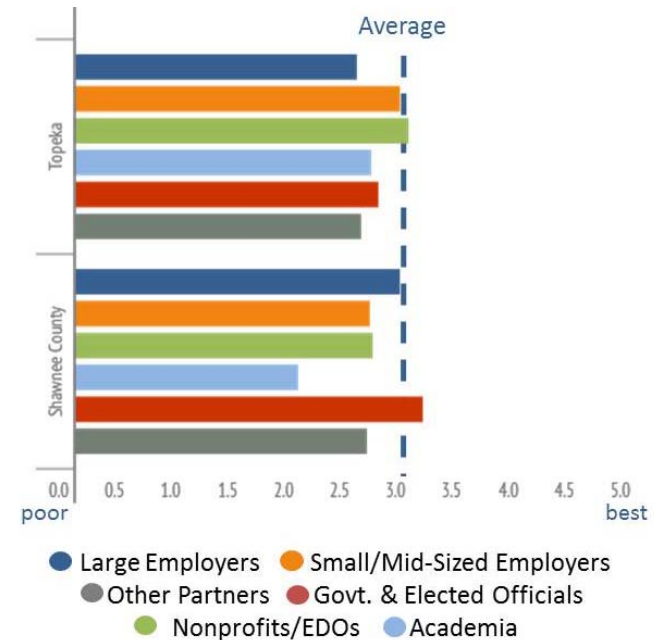
- **Topeka and Shawnee County are seen as average, at best.**

While there were some points of community pride and recognition of the economic development wins and positive

## Participation by Engagement Group



## Business Climate Score by Focus Group

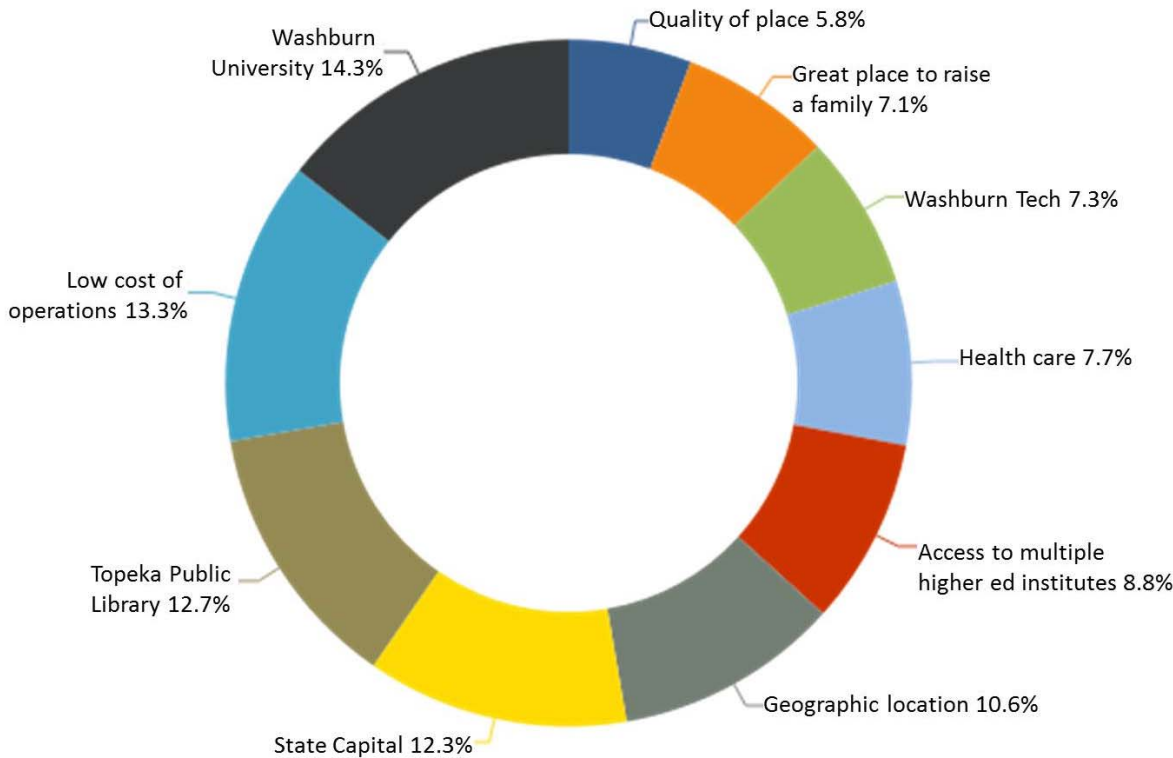




attributes of the region as a place for business, the large majority of focus group participants ranked the region as average and were hard-pressed to name amenities or assets that set it apart from any other like-sized metropolitan area in the United States. Participants pointed to recent developments in North Topeka, improvements in the parks and recreation department, the attractiveness of the region for young families, the long-awaited beginnings of a revitalized downtown, and the passage of the ½ cent sales tax to fund economic development as steps in the right direction.

However, there were several negative comments and pessimistic sentiments expressed when asked what the community lacks or could do to improve. Among these (in no order) are a lack of diversity, the need to invest more in community improvement, lack of transparency within local government, a perception that economic development is geared only toward recruitment, a sense that not enough resources are directed toward existing and smaller, locally grown companies, a sense of mistrust in elected officials (both in terms of who they serve and also in terms of their ability to execute), and the belief that growth in the City and County is unbalanced—with some areas getting more attention and resources.

Most Frequently Noted Strengths



- **Negativity hinders progress.**

Related to the above, all focus groups noted that the community's tendency to find fault and always compare itself to other surrounding communities (e.g., Lawrence, Manhattan) is impeding the community. They note that such negative sentiment—especially as it relates to JEDO and GO Topeka—is supported and, at times, encouraged by local media.

Coupled with the widespread belief that the local leadership lacks the expertise and tools to carry out economic development or product improvement initiatives, the prevalence of naysayers and tendency not to celebrate (or even publicize) successes have caused the City and County to tend toward inaction. Several note that the City Council and County Commission have the tendency to say “yes” to most ideas, resulting in programs that appear ad hoc, are unconnected, and seem to have little return for the community as a whole. The perception is held more by long-time residents. People new to the community have a markedly more positive perception of the region (City and County).

“The community tends to come up with great ideas and then shoot them down as soon as possible; the pessimism inhibits us. We need to overcome the negativity and suspicion.”

—Focus Group Participant

- **Uncertainty leads to mistrust.**

When asked to describe JEDO and GO Topeka, the most frequently expressed sentiment is that no one knows who they are or what they do. Several focus group participants defended and praised the activities and results of recent economic development initiatives and noted that the region's economy would be in worse condition had it not been for the recruitment efforts. Those more familiar with the organizations (either because they sit on boards, represent companies who have worked with either, are beneficiaries of the programs or do business with companies in the region) were naturally more vocal and supportive of the organizations' efforts. Those with less interaction could appreciate the results and offered suggestions on how to reach and support the efforts of other segments of the population (e.g., smaller companies, entrepreneurs).

“The largest issue our community has is negativity, closed-mindedness, and lack of education on the big picture.”

—Survey Respondent

- **Topeka should strive to be more than blue-collar or state government industries.**

Focus group participants believe that the City and County should try to diversify the region's economy and better embrace technology. Participants offered that one way to entice the area's youth or graduates to remain in Topeka is to have jobs that they can, and want to, come back to do. A related topic raised is the lack of amenities for Millennials. Several focus group participants noted that much is being done to attract and retain this demographic group, especially when compared to other jurisdictions. Others could not define what those efforts are or if they are real.

- **Topeka lacks curb appeal.**

In addition to noting the blight and high vacancy rate downtown, participants noted the poor road conditions, lack of signage, and tired gateways as areas that need to be improved. The poor aesthetics of the City tend to reinforce the perception of Topeka as stagnant. Conversely, some participants recognized that the open building stock could be leveraged as an advantage for in-fill development.

- **The region has assets upon which it can build.**

Despite the negative sentiments referenced above, each of the focus groups were able to list a number of initiatives and assets in the City and County that could be leveraged and improved to strengthen the region's quality of place. Among these (in no order) were Washburn University; Washburn Tech; the Topeka Public Library; the region's recreational facilities; the abundance of flat, site-ready land; and the passage of the sales tax for economic development.

"We have a hard time following through and completing projects—that's why the general public is less than optimistic or isn't keen on new initiatives. They think it has all been done before."

—Focus Group Respondent

"Topeka is ugly. We need to have more 'curb' appeal on I-70 and throughout our heavily trafficked intersections off of 470 and I-70 to compete with communities to our east that are so much more appealing."

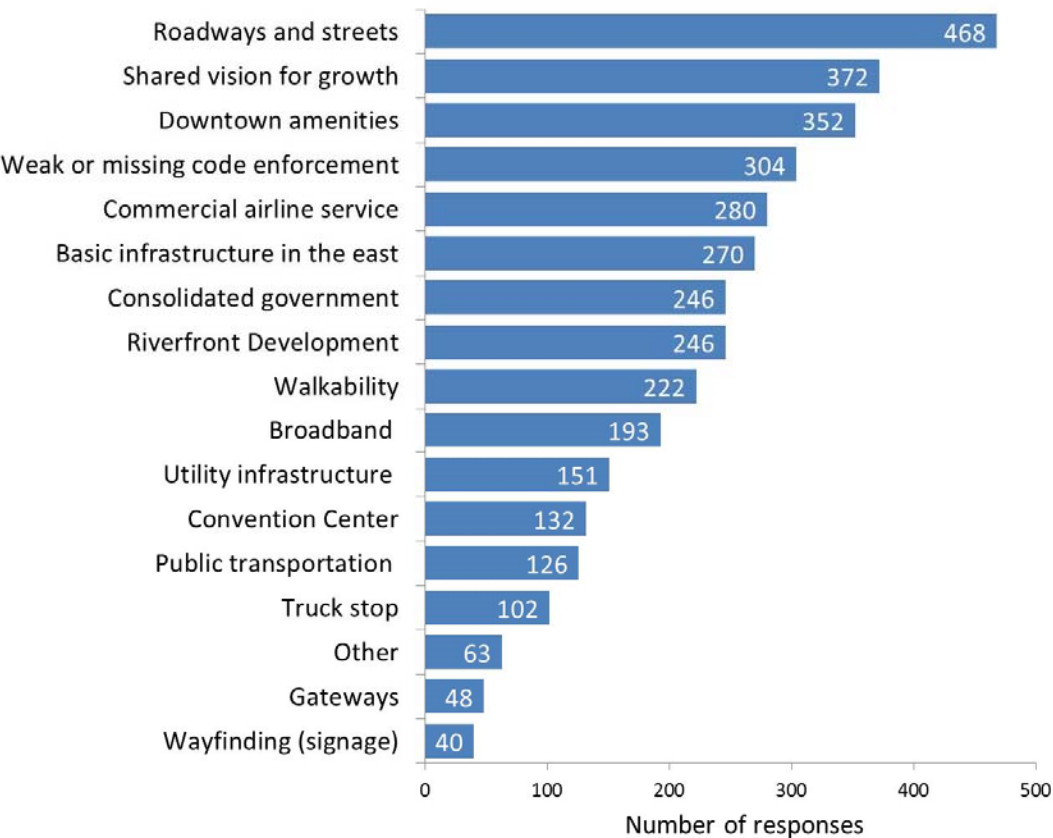
—Survey Respondent



• **Infrastructure in Topeka and Shawnee County has been neglected.**

Focus group participants and survey respondents were asked if there is hard or soft infrastructure that is lacking in the City and County or that needs to be improved.<sup>1</sup> Participants most frequently noted the poor condition of internal roadways (and the time it takes to repair them), as well as a lack of utilities in the County and the lack of broadband Internet in some areas of the County. Participants noted the lack of walkability throughout the City and noted that the main gateways into the City—especially in the East—do not provide the image that is desired.

**Infrastructure Needs**



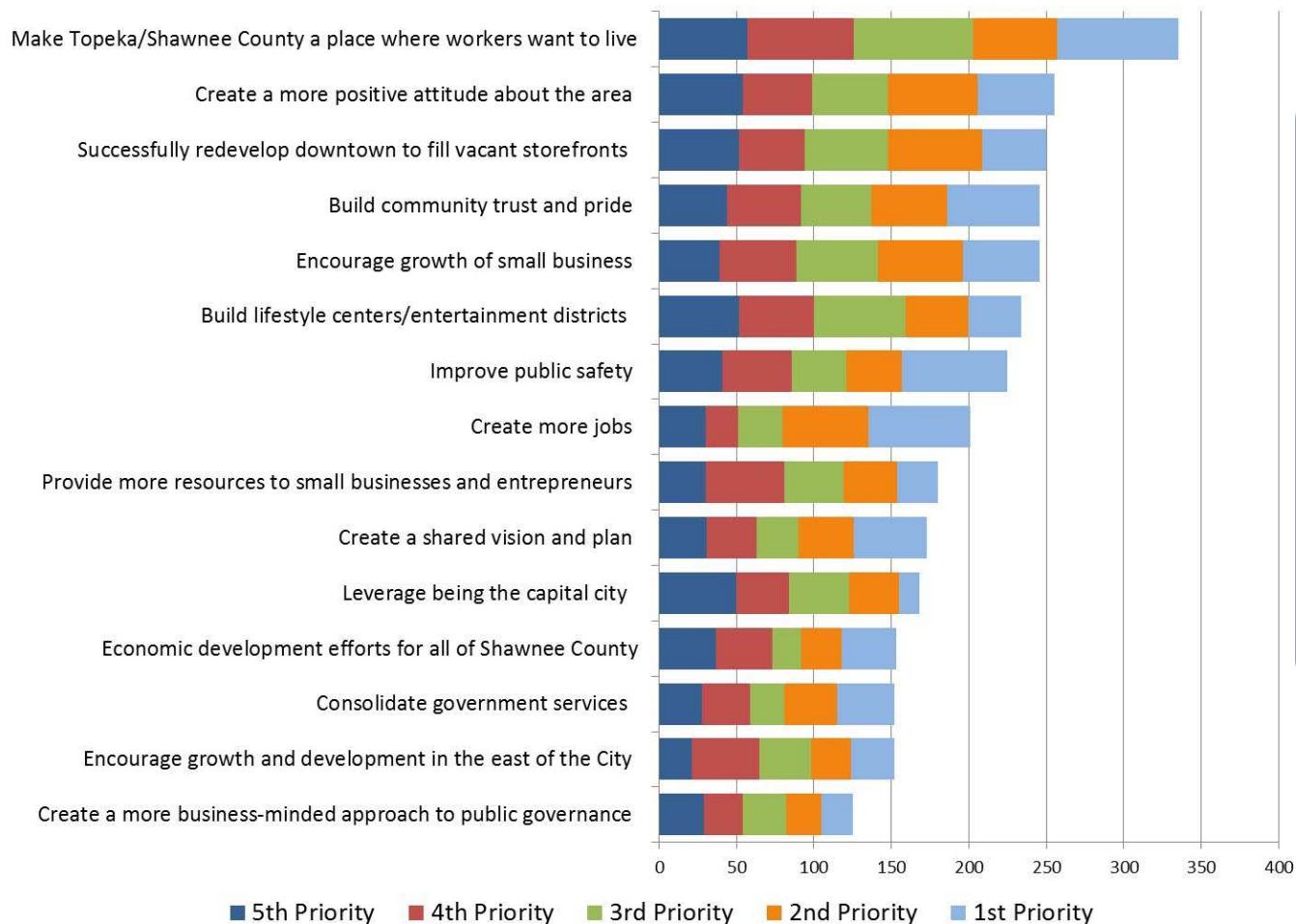
“JEDO should be focused on building a livable community. Much of what makes Topeka livable is already there but needs to be enhanced. Build on what exists with new amenities.”  
—Survey Respondent

<sup>1</sup> 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.

- **Future vision should be community-wide and holistic.**

When asked what could be done to strengthen the community without regard to money or politics, focus group participants and survey respondents tended toward answers that address the product or amenities the City and County have to offer and the way in which the two entities go about growing and attracting business.

### Community Priorities



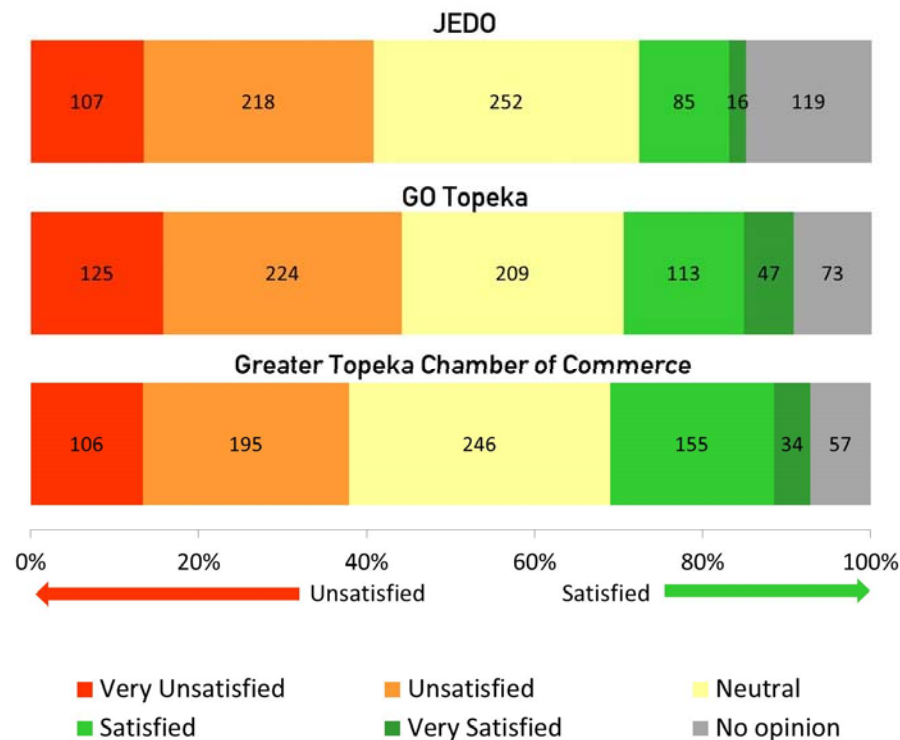
"It is not enough to create a shared vision and plan. The plan must identify the opportunities and threats facing the Topeka and Shawnee County Community, understand the strengths and weaknesses of the community to develop the opportunities and stop the threats, and contain specific, measurable, achievable, results-oriented, and time-bound (SMART) goals to maintain the strengths and correct the weaknesses. Otherwise, the vision and plan will only be attractive documents that are placed on bookshelves and not implemented."

—Survey Respondent

- **Lack of confidence in Economic Development efforts.**

Survey participants were asked to rate JEDO, GO Topeka, and the Greater Topeka Chamber of Commerce in regard to their level of satisfaction with each. Results echoed perceptions offered in the focus groups that the results of and interaction with three organizations are not held highly. Similarly, when asked to provide words or phrases to describe JEDO and GO Topeka, the sentiments tend toward the negative.

**When asked “What are your past experiences with and current perceptions of the various economic development groups involved in investment attraction and retention?” survey participants responded:**

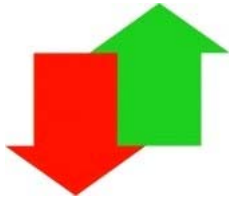


**When asked “What words or phrases describe JEDO? GO Topeka?” survey participants responded:**

	Positive	Negative
JEDO	<ul style="list-style-type: none"> <li>Well-intentioned</li> <li>Serves the Community</li> <li>Collaboration</li> <li>Effective</li> <li>Progressive</li> <li>Supportive</li> <li>Inclusive</li> <li>Unique</li> </ul>	<ul style="list-style-type: none"> <li>"Good old boy" network</li> <li>Non-transparent</li> <li>Ineffective</li> <li>Politically correct</li> <li>Secretive</li> <li>Misunderstood</li> <li>Non-performing</li> <li>No out-of-the-box thinking</li> <li>Controversial</li> <li>Non-inclusive</li> <li>Focused on new growth</li> <li>Corrupt</li> <li>Negative press</li> <li>Oriented toward larger companies</li> <li>Little understanding of who JEDO is</li> <li>Lack of oversight by public officials</li> </ul>
GO Topeka	<ul style="list-style-type: none"> <li>Markets the community</li> <li>Community-focused</li> <li>Big wins/effective work</li> <li>Optimistic</li> <li>Ambassadors</li> <li>Progressive</li> <li>Visionary</li> <li>Passionate</li> <li>Service provider</li> <li>Visible externally</li> <li>Nimble</li> <li>Stepping out of the box</li> <li>Great listeners</li> </ul>	<ul style="list-style-type: none"> <li>Non-transparent</li> <li>Unaccountable with funds</li> <li>Poor performing</li> <li>Exclusive group</li> <li>Chamber of Commerce</li> <li>Political</li> <li>Arrogant</li> <li>Misunderstood</li> <li>Not elected</li> <li>For profit using tax money</li> </ul>



## CHAPTER 2: DASHBOARD INDICATORS SUMMARY



The following analysis examines the economic position and competitiveness of Topeka and Shawnee County, Kansas. For context, this report compares Topeka and Shawnee County to itself over time, the nation, the State of Kansas, and three benchmark communities. The counties selected comprise the cities of Cedar Rapids, Iowa; Sioux Falls, South Dakota; and Chattanooga, Tennessee. These counties are Linn County, Iowa; Minnehaha County, South Dakota; and Hamilton County, Tennessee. These communities were selected based on feedback from JEDO members, GO Topeka, and Garner Economics' analysis considering those counties who have growing, healthy, and holistic economies with similar industry clusters and business targets. Attention was also given to success stories of how communities like Chattanooga transformed themselves from a decaying city/county 20 years ago to a thriving community today.



The importance of these metrics and economic indicators is that many of them will serve as an annual metrics scorecard for JEDO and the community to measure how well the City and County are doing economically over time.

### METHODOLOGY

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies that had similar data for all benchmarks. In all cases, the original and most current available data as of August 2015 are used. Garner Economics conducted all unique calculations and computations from the original data. Please refer to the full Methodology Section in the Appendices of this report. Sources for this study include:

#### **US Census Bureau**

- Population Estimates – population growth released annually (latest 2014)
- American Community Survey – demographics, income, education, poverty (latest 2013)
- Business Dynamics Statistics – business startups (latest 2012)

#### **Bureau of Labor Statistics**

- Local Area Unemployment Statistics – employment (latest Jun 2015)
- Quarterly Census of Employment and Wages – employment and wages (latest year-end 2014)

#### **FBI**

- Uniform Crime Reports – crime (latest annual report 2013)

#### **C2ER**








- Cost-of-Living Index – cost of living (latest 1<sup>st</sup> quarter 2015)

#### **National Telecommunications and Information Administration**

- Broadband access and speed (latest as of June 2014)



### Demographic Dynamics

	Over the last decade, the total population of Topeka and Shawnee County has increased by 3,161 and 7,068, or 3% and 4% respectively. This is a slower rate than Kansas or the United States and less than half the growth rates of the benchmark communities.
	Over the 2009 to 2013 period, Topeka and Shawnee County attracted 3.4% and 2.9% of their new residents from a <i>Different County in Same State</i> —this is higher or on par with other benchmarks. Topeka had a higher percentage of residents moving in from a different state than Linn County as well as the national rate; however they were lower than rest of the communities and the state along with Shawnee County's 2.2%. The area ranked slightly below all other benchmarks in attracting residents from <i>Abroad</i> .
	Topeka was slightly more diverse than Linn County, Minnehaha County, and Kansas—ranking highest in those who identified themselves as <i>Two or More Races</i> . Topeka and Shawnee County are less diverse than the nation.
	Although Shawnee County's median age was the second highest of the benchmarks, the age distribution among all communities was comparable with the largest percentage of population between 25 and 54. Topeka has the highest percentage of those under 5, 20-24 and then those over 75.
	In 2013, Topeka and Shawnee County had the highest property crime rates of all benchmarks and were second only to Hamilton County in violent crime rates.
	Topeka and Shawnee County have the top percentage of <i>High School Graduates</i> for residents age 25+ but have lower shares of those who have achieved <i>Associate's Degree</i> . However, the percentage of those with <i>Graduate or Professional Degrees</i> is greater than other benchmark communities and close to state and national rates.
	Among new residents ages 25 and over, Topeka and Shawnee County are adding more <i>High School Graduates</i> than any other category; however, they closely match the state and national level for new residents with a <i>Graduate or Professional Degree</i> outranking the percentage of other benchmark communities attracted in this particular category.













## Labor Dynamics

	Topeka and Shawnee County show June 2015 preliminary unemployment rates of 4.9% and 4.6%, similar to the state. Linn and Minnehaha Counties are lower; Hamilton County and national unemployment rates are higher.
	Labor force participation is decreasing; however, the trend is also being followed by most benchmarks with the exception of Hamilton County, which increased sharply from June 2014 to June 2015.
	Topeka has the highest number of single female householders participating in the labor force (24%) and both Topeka and Shawnee County have the lowest percentage of families in the labor force. For married-couple families with both husband and wife in the labor force, Topeka (37%) and Shawnee County (41%) were in the middle of the array with Hamilton County the lowest (36%) and Minnehaha County the highest (53%).
	Employment change for Shawnee County was low at 2% over the past decade; however, it was higher than Hamilton County (-2%). The average annual change for Shawnee County was 1%, the same as Linn County and Kansas.
	Just 4.8% of workers in Topeka and 5.7% in Shawnee County classify themselves as <i>Self-Employed</i> ; this proportion is well below the state, nation, and the benchmark communities.
	Median earnings among those workers classified as <i>Self-Employed in Own Incorporated Business</i> were \$70,608 in Shawnee County—the highest among all benchmarks. Topeka placed just behind Minnehaha County in this same category with median earnings of \$60,569. Median earnings for those classified as <i>Self-Employed in Own Not Incorporated Business</i> in Topeka were low at \$19,696, but not far behind other benchmarks, which ranged from \$21,541 (Hamilton County) to \$29,695 (Minnehaha County).
	The number of startups from 2008 to 2012 in the Topeka MSA, the smallest geography available for this statistic, was less than other regions; however, the growth rate for Topeka MSA is increasing on a similar trajectory as Kansas and the United States. Chattanooga, which ranked the highest with number of startups among the MSAs, has a growth rate that has flattened since 2010.



### Income & Economic Dynamics

	In 2014, the estimated average weekly wage in Shawnee County was \$801, and its growth rate (25%) was the lowest among all benchmarks. Shawnee County followed the general growth trend of all benchmarks, deviating in 2012 and 2013 with a slower rate.
	Topeka and Shawnee County ranked slightly higher in the lower income categories, dropping with the two highest income category levels of the state and nation. However, they were second only to Minnehaha County in the \$50,000 to \$74,999 category.
	The average per capita income in Topeka in 2013 was \$23,513 and \$25,156 in Shawnee County, the lowest of all benchmarks.
	Topeka has the highest percentage below poverty level within the general population (21%) and children under 18 (29%). Hamilton County was a close second with 27% of children under 18 below the poverty level.
	Topeka and Shawnee County both had a higher number of populations with <i>Less than High School</i> education levels below the poverty level than all other benchmarks.
	Median earnings are low for those with <i>Less than High School</i> , but second highest for those with <i>High School</i> level education. Income for other categories fell in the middle of the array for the benchmarks.
	At 93, the composite Cost-of-Living Index for Topeka was the lowest of all benchmark communities and a housing cost index significantly lower than the national average.
	Topeka has the highest availability of cable access and the fastest download and upload speeds of all benchmarks, including Shawnee County.

## CHAPTER 3: DEMOGRAPHIC DYNAMICS

### Population Growth



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.

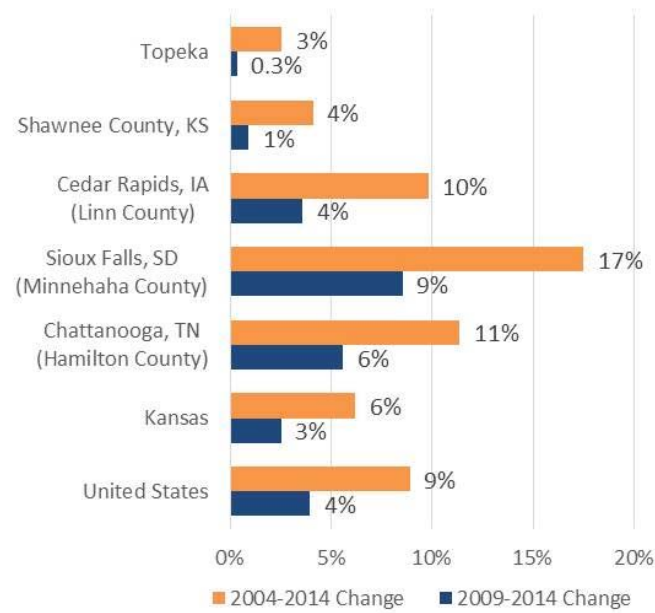
According to Census figures, the total 2014 population of the City of Topeka was 127,215 and Shawnee County was 178,406. This marks an increase of 3 percent and 4 percent respectively, or 3,161 and 7,028 more residents over the last decade. This growth rate falls below the benchmark counties, the state, and the nation (Figure 1 and Table 1). All of the benchmark counties outpaced national growth during the past decade.

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Topeka and Shawnee County followed a trend of slow, steady growth until 2012 with several years of negative growth rates. The annual rate of change is improving with 2014 (Figure 2). Over the last five years, the annual rate of population growth in Topeka has been 0.44 percent, while over 10 years, the rate averaged 0.25 percent (Table 2). Shawnee County tracked a similar trend with rates of 0.62 and 0.4% respectively. Linn County, South Dakota also saw a declining annual growth rate; however, Minnehaha and Hamilton Counties saw alternate patterns, with a boost in annual growth, then slowing in 2014.

**Figure 1**  
*Net Population Change (%)*



Source: US Census Bureau, Garner Economics

**Table 1**

*Net Population Change  
Highest Relative Figure Shaded.*

	2014 Population	2009- 2014 Change	5-Year Percent Change	2004- 2014 Change	10-Year Percent Change
Topeka	127,215	396	0.3%	3,161	3%
Shawnee County, KS	178,406	1,620	1%	7,028	4%
Cedar Rapids, IA (Linn County)	217,751	7,534	4%	19,437	10%
Sioux Falls, SD (Minnehaha County)	182,882	14,400	9%	27,234	17%
Chattanooga, TN (Hamilton County)	351,220	18,561	6%	35,824	11%
Kansas	2,904,021	71,317	3%	169,648	6%
United States (in thousands)	318,857	12,086	4%	26,052	9%

Source: US Census Bureau, Garner Economics

**Table 2**

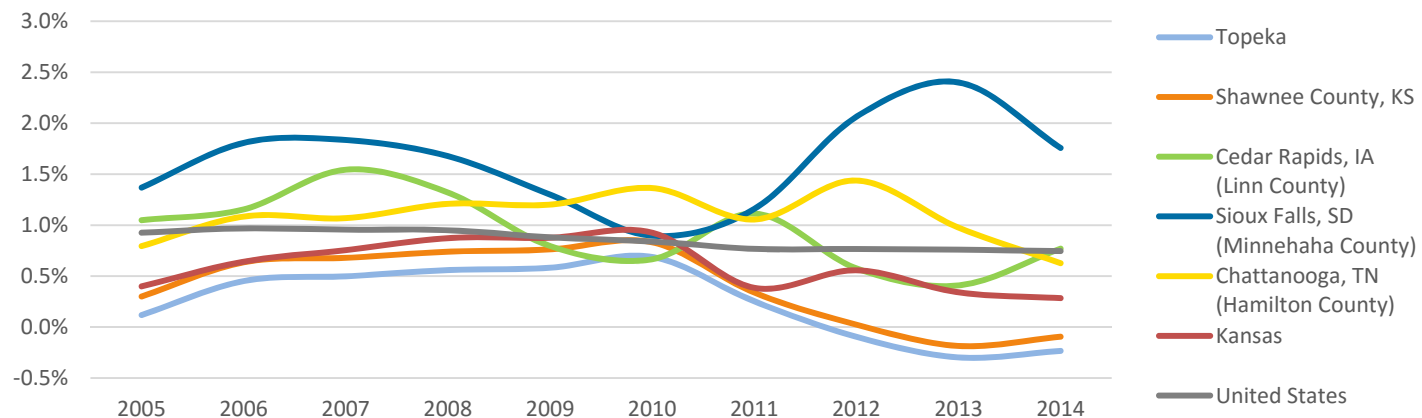
*Average Annual Rate of Population Change*

	5-Year	10-Year
Topeka	0.44%	0.25%
Shawnee County, KS	0.62%	0.40%
Cedar Rapids, IA (Linn County)	1.17%	0.94%
Sioux Falls, SD (Minnehaha County)	1.60%	1.63%
Chattanooga, TN (Hamilton County)	1.07%	1.08%

Source: US Census Bureau, Garner Economics

**Figure 2**

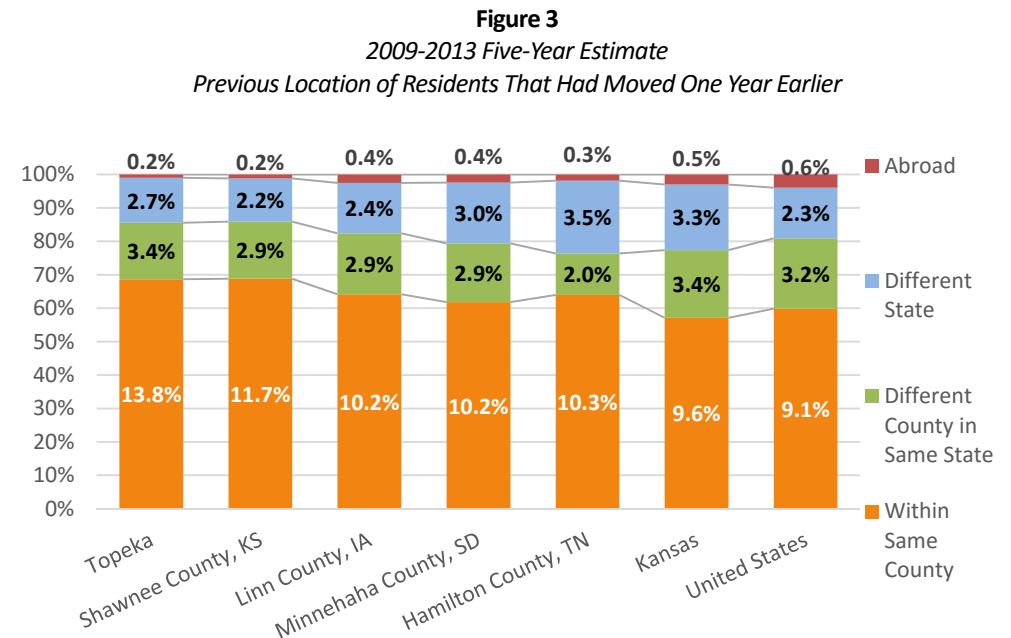
*Annual Rate of Population Change*



Source: US Census Bureau, Garner Economics

### Sources of New Residents

Attracting new residents from a diversity of outside locations can reflect a community's broader appeal and provide an indicator of business dynamics. Over the 2009 to 2013 period, Topeka and Shawnee County attracted 3.4 and 2.9 percent of their new residents from a *Different County in Same State*. Topeka drew as many new residents as Kansas did within the state, and Shawnee County was comparable to Linn and Minnehaha Counties and higher than Hamilton County on that same measure. Topeka and Shawnee County trended slightly higher for those moving within the County. However, both Topeka and Shawnee County ranked below the benchmarks in people moving from a *Different State* and from *Abroad* (Figure 3 and Table 3).



Source: US Census Bureau, Garner Economics

**Table 3**  
2009-2013 Five-Year Estimate  
Previous Location of Residents That Had Moved One Year Earlier  
Highest Relative Figure Shaded.

	Topeka	Shawnee County, KS	Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
Within Same County	13.8%	11.7%	10.2%	10.2%	10.3%	9.6%	9.1%
Different County in Same State	3.4%	2.9%	2.9%	2.9%	2.0%	3.4%	3.2%
Different State	2.7%	2.2%	2.4%	3.0%	3.5%	3.3%	2.3%
Abroad	0.2%	0.2%	0.4%	0.4%	0.3%	0.5%	0.6%

Source: US Census Bureau, Garner Economics

### Population by Race and Hispanic Origin

By itself, racial diversity is not a determinant 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 globally.

Relative to the benchmark communities as well as the state and the nation, Topeka and Shawnee County have a higher proportion of residents classifying themselves as having *Two or More Races* and a larger amount of *Hispanic or Latino* population than all of the other benchmarks, but is still below the national average. There is a relatively higher proportion of *Black or African-American* residents in Topeka and Shawnee County than in Kansas and the other benchmark communities with the exception of Hamilton County and nationally. Additional ethnic distinctions are generally on par with other communities barring the American Indian and Alaskan Native population in Minnehaha County (Table 4).

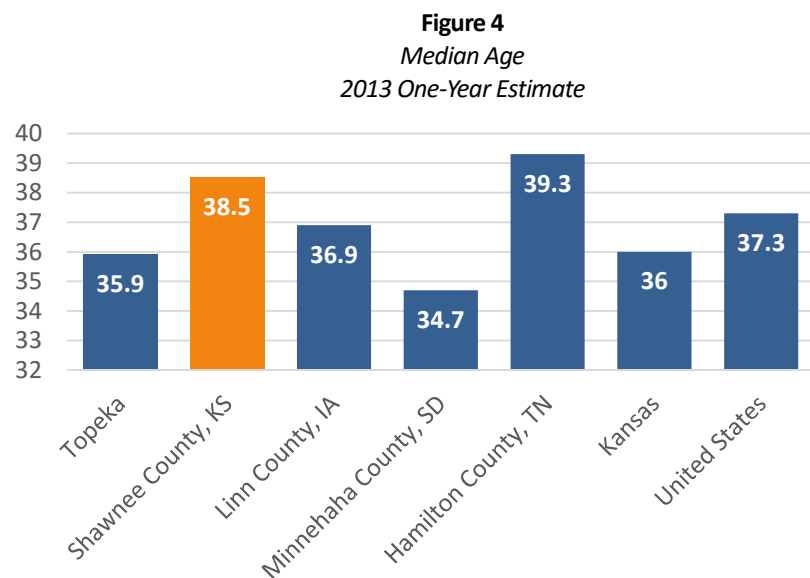
**Table 4**  
2013 One-Year Estimate  
Race & Hispanic Origin by Percentage of Total Population  
(Highest Relative Figure Shaded)

	Topeka		Shawnee County, KS		Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
	#	%	#	%					
White	102,351	80.15%	149,714	83.72%	89.43%	86.92%	75.54%	85.56%	73.69%
Black or African-American	12,417	9.72%	12,952	7.24%	5.29%	3.79%	19.85%	5.81%	12.63%
American Indian and Alaska Native	1,034	0.81%	1,402	0.78%	0.02%	2.76%	0.11%	0.84%	0.80%
Asian	1,637	1.28%	1,873	1.05%	1.70%	1.57%	2.03%	2.53%	5.07%
Native Hawaiian/Other Pacific Islander	47	0.04%	305	0.17%	0.00%	0.19%	0.12%	0.05%	0.17%
Some Other Race	2,921	2.29%	3,461	1.94%	1.67%	1.86%	0.80%	1.91%	4.69%
Two or More Races	7,295	5.71%	9,124	5.10%	1.90%	2.90%	1.55%	3.30%	2.96%
Hispanic Or Latino (of any race)	16,913	13.24%	20,613	11.53%	2.89%	4.65%	4.94%	11.14%	17.08%

Source: US Census Bureau, Garner Economics

## Age

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-age 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. As workforce has become key in site location decisions, a good blend of younger workers to train for specific skills as well as older, experienced workers offer better opportunity for both startup and long-term stability.

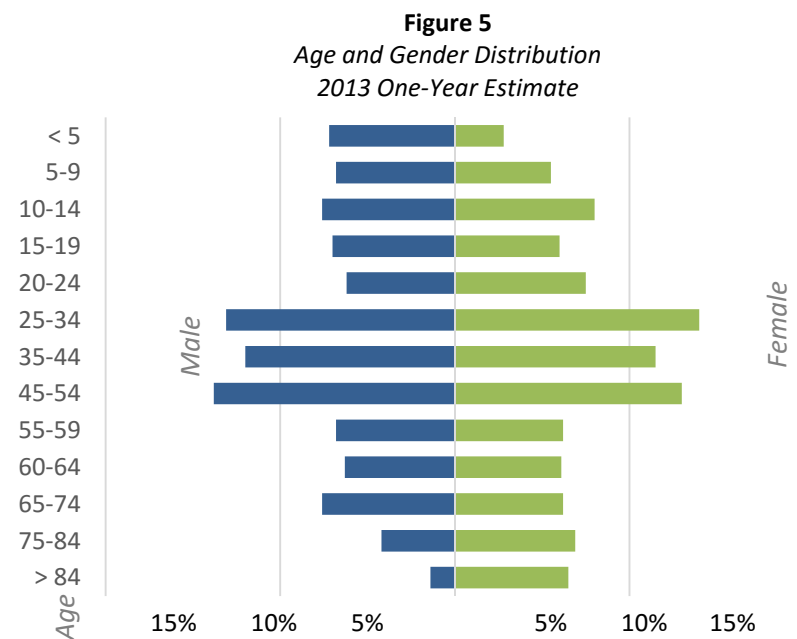


Source: US Census Bureau, Garner Economics

## Median Age and Age Group Composition

At 35.0 years, the median age in Topeka shows a younger population than all benchmarks with the exception of Minnehaha County. Shawnee County has a higher median age at 38.5, which is older than most benchmarks, save Hamilton County (Figure 4 and Table 5).

Shawnee County has its concentration of the population within the ages of 25 to 54, which is evenly divided among males and females (Figure 5). This trend is followed by all of the benchmark geographies (Figures 6 and 7). Minnehaha County does have the largest population between 25 and 54 standing out among the benchmarks.



Shawnee County  
Source: US Census Bureau, Garner Economics



**Table 5**  
*Age Groups by Percentage of Total Population*  
2009-2013 Five-Year Estimate  
(Highest Relative Figure Shaded)

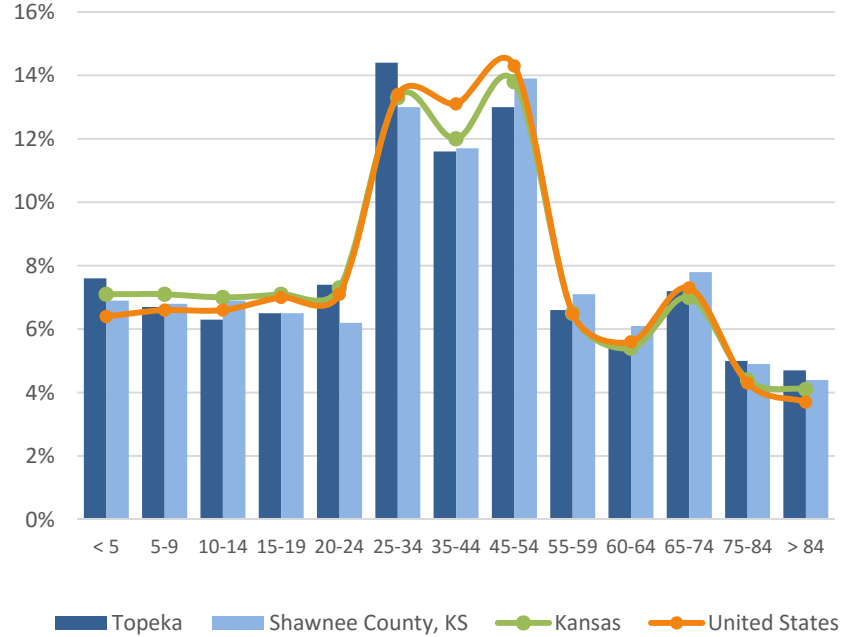
	Topeka		Shawnee County, KS		Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
	#	%	#	%					
<b>Median age</b>		35.9		38.5	36.9	34.7	39.3	36	37.3
<b>&lt; 5</b>	9,700	7.6%	14,726	6.9%	6.6%	7.6%	6.0%	7.1%	6.4%
<b>5-9</b>	8,551	6.7%	14,513	6.8%	6.8%	7.1%	5.9%	7.1%	6.6%
<b>10-14</b>	8,040	6.3%	14,726	6.9%	6.9%	6.4%	5.9%	7.0%	6.6%
<b>15-19</b>	8,296	6.5%	13,873	6.5%	6.9%	6.6%	6.6%	7.1%	7.0%
<b>20-24</b>	9,444	7.4%	13,232	6.2%	7.0%	7.3%	7.1%	7.3%	7.1%
<b>25-34</b>	18,378	14.4%	27,745	13.0%	13.6%	15.6%	13.1%	13.3%	13.4%
<b>35-44</b>	14,805	11.6%	24,971	11.7%	12.9%	12.6%	12.9%	12.0%	13.1%
<b>45-54</b>	16,591	13.0%	29,666	13.9%	14.1%	14.1%	14.2%	13.8%	14.3%
<b>55-59</b>	8,423	6.6%	15,153	7.1%	6.4%	6.3%	7.3%	6.5%	6.5%
<b>60-64</b>	7,019	5.5%	13,019	6.1%	5.5%	5.2%	6.1%	5.4%	5.6%
<b>65-74</b>	9,189	7.2%	16,647	7.8%	7.0%	5.9%	8.1%	7.0%	7.3%
<b>75-84</b>	6,381	5.0%	10,458	4.9%	4.3%	3.6%	4.8%	4.4%	4.3%
<b>&gt; 84</b>	5,998	4.7%	9,391	4.4%	3.7%	3.5%	4.3%	4.1%	3.7%

Source: US Census Bureau, Garner Economics



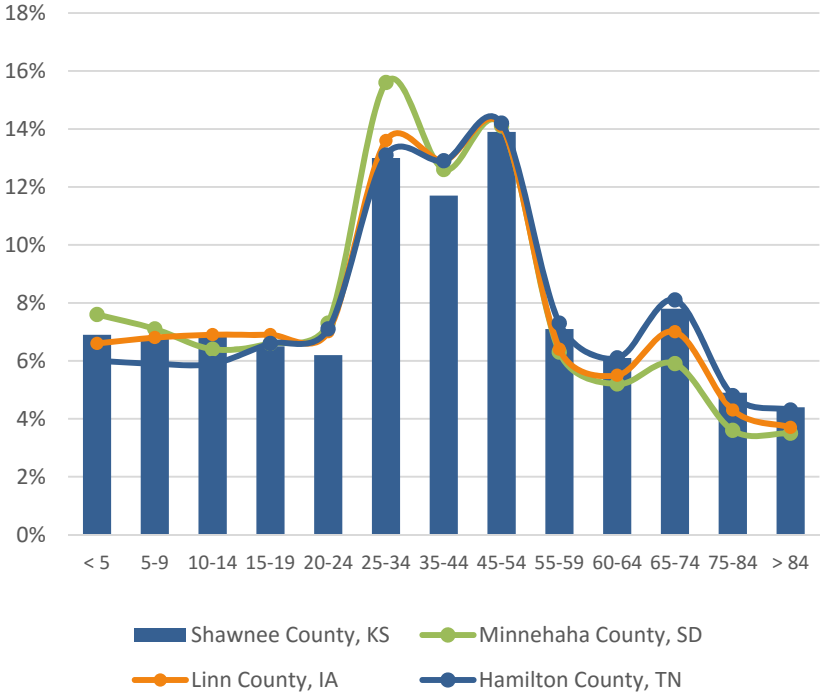


**Figure 6**  
*Age Groups by Percentage of Total Population*  
*2013 One-Year Estimate*  
*Local compared to State and United States*



Source: US Census Bureau, Garner Economics

**Figure 7**  
*Age Groups by Percentage of Total Population*  
*2013 One-Year Estimate*  
*Benchmark Communities*



Source: US Census Bureau, Garner Economics

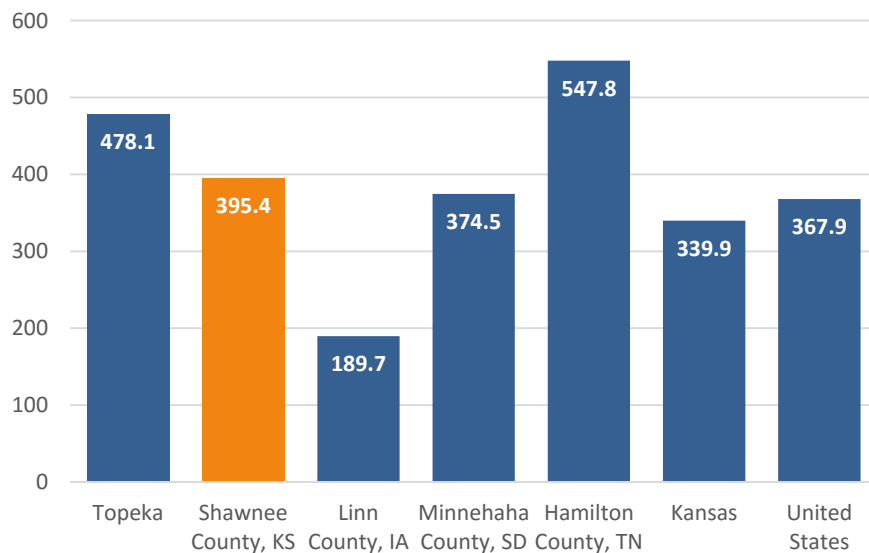
## Crime

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

In 2013, Topeka and Shawnee County's violent crime rate was higher than the benchmark communities with the exception of Hamilton County, which was the highest among all geographies (Figure 8). Topeka had the highest property crime rate; however, since this figure represents just the City police department reports, it is not directly comparable to the remaining geographies that have both urban and rural areas combined for their rates. Shawnee County did have a considerably high property crime rate—above all other benchmarks (Figure 9 and Table 6).

**Figure 8**

*Violent Crime Rates per 100,000 Residents, 2013*



Source: Federal Bureau of Investigation, Garner Economics

**Table 6**

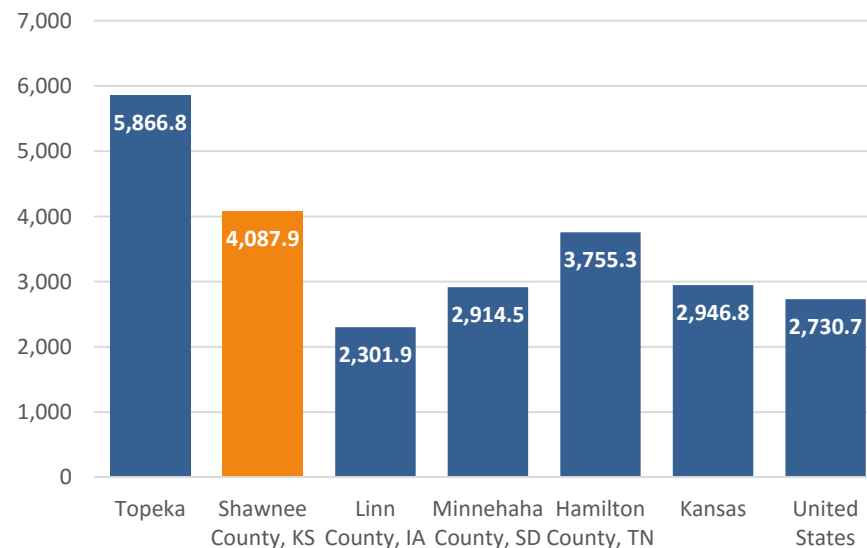
*Crime Rates per 100,000 Residents, 2013  
(Highest Relative Figure Shaded)*

	Violent	Property
Topeka	478.1	5,866.8
Shawnee County, KS	395.4	4,087.9
Linn County, IA	189.7	2,301.9
Minnehaha County, SD	374.5	2,914.5
Hamilton County, TN	547.8	3,755.3
Kansas	339.9	2,946.8
United States	367.9	2,730.7

Source: Federal Bureau of Investigation, Garner Economics

**Figure 9**

*Property Crime Rates per 100,000 Residents, 2013*



Source: Federal Bureau of Investigation, Garner Economics

## Education

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.

### Educational Attainment

Educational attainment among the Topeka and Shawnee County population ages 25+ is comparable to all other geographies with the highest level of *High School Graduates* (Table 7). Both Linn and Minnehaha Counties have a higher number of residents with an *Associate's Degree* or a *Bachelor's Degree* (Figure 11). Topeka and Shawnee County rate higher than the other benchmark communities for those with *Graduate or Professional Degree* and are close to the state and national rate for this level of education (Figure 10).

**Table 7**  
*Educational Attainment, Percentage Total Population Age 25+  
2013 One-Year Estimate  
(Highest Relative Figure Shaded)*

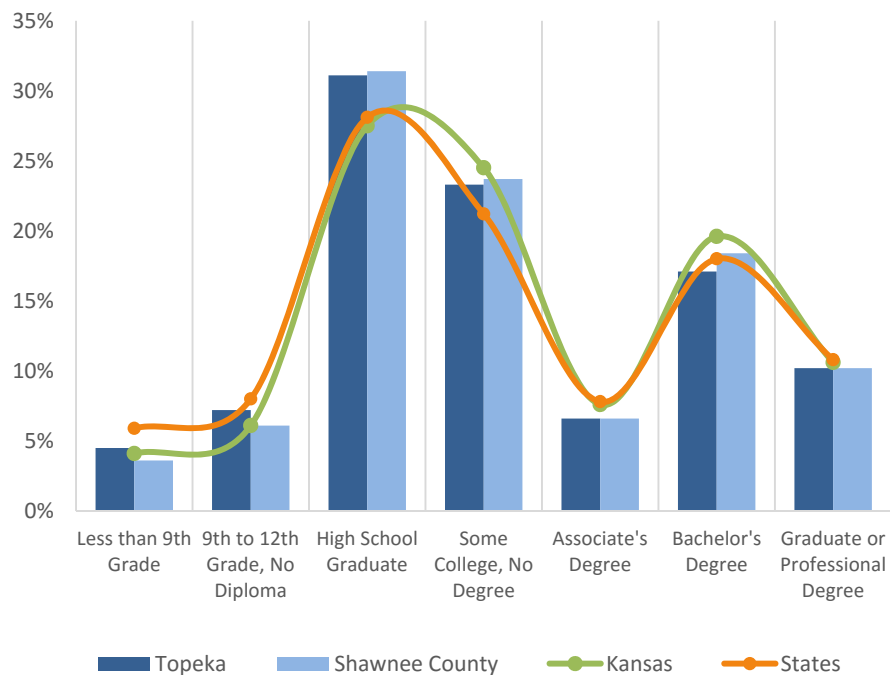
	Topeka		Shawnee County, KS		Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
	#	%	#	%					
Less than 9 <sup>th</sup> Grade	3,768	4.5%	4,280	3.6%	1.80%	3.9%	4.9%	4.1%	5.9%
9 <sup>th</sup> to 12 <sup>th</sup> Grade, No Diploma	6,028	7.2%	7,253	6.1%	4.40%	5.4%	8.8%	6.1%	8.0%
High School Graduate	26,038	31.1%	37,333	31.4%	27.00%	29.5%	27.6%	27.5%	28.1%
Some College, No Degree	19,508	23.3%	28,178	23.7%	23.80%	21.3%	24.0%	24.5%	21.2%
Associate's Degree	5,526	6.6%	7,847	6.6%	11.90%	10.8%	7.4%	7.6%	7.8%
Bachelor's Degree	14,317	17.1%	21,877	18.4%	21.60%	20.7%	17.5%	19.6%	18.0%
Graduate or Professional Degree	8,540	10.2%	12,127	10.2%	9.60%	8.5%	9.7%	10.6%	10.8%

Source: US Census Bureau, Garner Economics



**Figure 10**

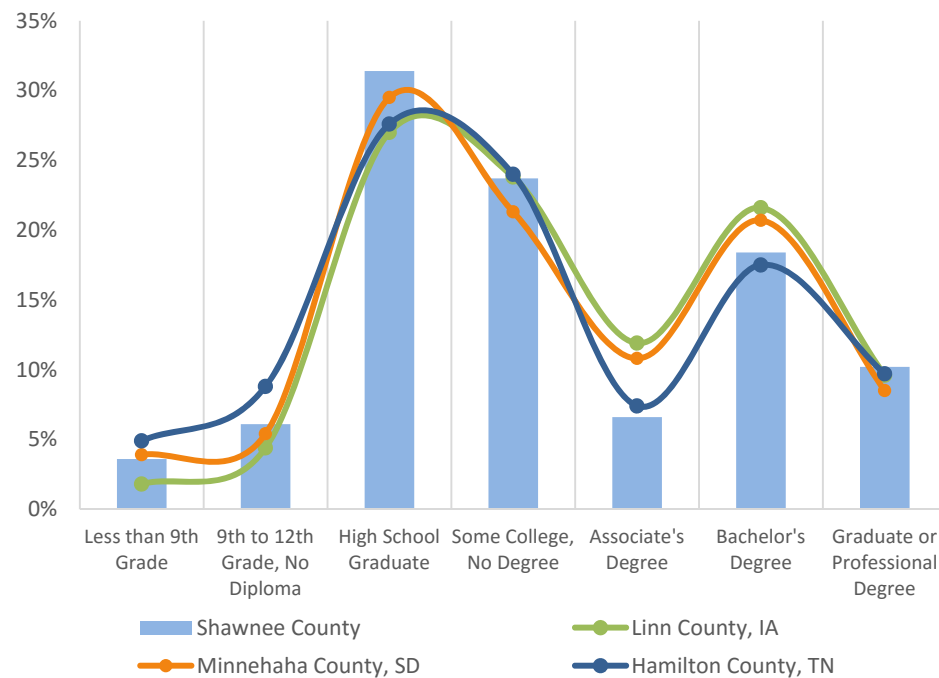
*Educational Attainment, Percentage Total Population Age 25+  
2013 One-Year Estimate  
Local compared to State and United States*



Source: US Census Bureau, Garner Economics

**Figure 11**

*Educational Attainment, Percentage Total Population Age 25+  
2013 One-Year Estimate  
Benchmark Communities*

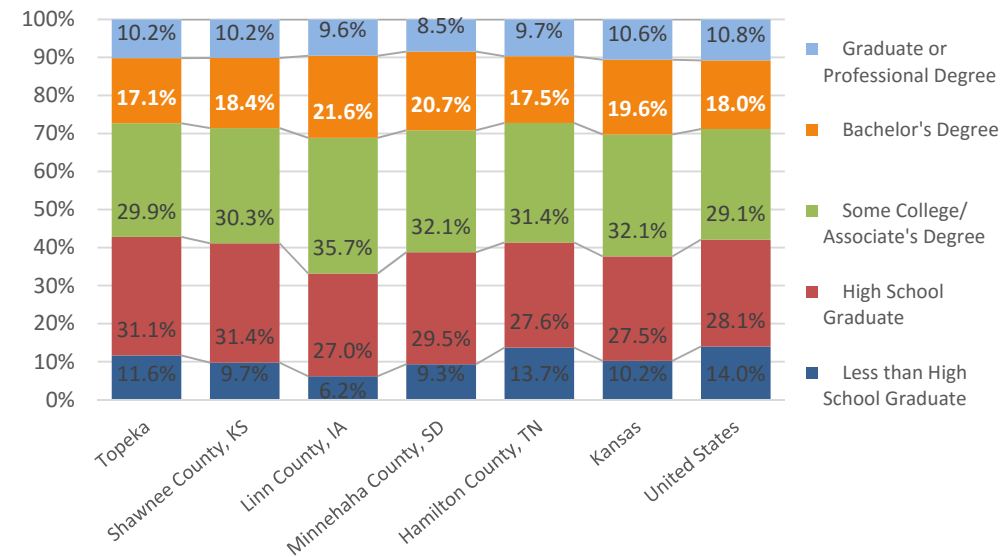


Source: US Census Bureau, Garner Economics

### Population In-Migration by Educational Attainment

Among new residents ages 25 and over, Topeka and Shawnee County have a higher share of *High School Graduates* for new residents (Figure 12). The majority of new residents for all geographies are those with *Some College or Associate's Degree* and *High School* education with Shawnee County closely matching the national average for attracting new residents with a *Bachelor's Degree* (Table 8).

**Figure 12**  
Educational Attainment by Percentage of New Resident Population  
Ages 25 and over  
2013 One-Year Annual Estimates



**Table 8**  
Educational Attainment by Percentage of New Resident Population  
Ages 25 and over  
2013 One-Year Annual Estimates  
(Highest Percentages Shaded)

	Topeka		Shawnee County, KS		Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
	#	%	#	%					
Less than High School	9,746	11.6%	11,546	9.7%	6.2%	9.3%	13.7%	10.2%	14.0%
High School Graduate	26,073	31.1%	37,324	31.4%	27.0%	29.5%	27.6%	27.5%	28.1%
Some College/Associate's Degree	25,040	29.9%	36,027	30.3%	35.7%	32.1%	31.4%	32.1%	29.1%
Bachelor's Degree	14,330	17.1%	21,913	18.4%	21.6%	20.7%	17.5%	19.6%	18.0%
Graduate or Professional Degree	8,535	10.2%	12,086	10.2%	9.6%	8.5%	9.7%	10.6%	10.8%

Source: US Census Bureau, Garner Economics

## CHAPTER 4: LABOR DYNAMICS

### Labor Force and Participation



Unemployment rates have been falling, however *Labor Force Participation* has also been shrinking. Topeka and Shawnee County show June 2015 preliminary unemployment rates of 4.9 and 4.6 percent respectively.

Hamilton County and national unemployment rates are higher while Linn and Minnehaha Counties were significantly lower (Figure 13).

Declining labor force participation rates are evident in most benchmark communities, the state, and nation (Figure 14). The national rate is currently at its lowest point in 10 years. Hamilton County differs from this trend with a sharp increase from June 2014 to June 2015.

Among residents ages 16 and over in Topeka and Shawnee County, 56 and 58 percent of the labor force are *Employed* and 38 and 36 percent are *Not in the Labor Force*, respectively. Shawnee County is on par with the national rate of those *Not in the Labor Force*, more than all benchmarks except Hamilton County. With the

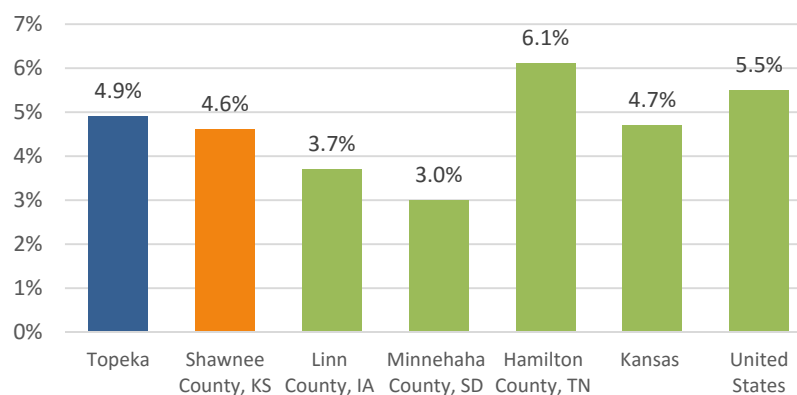
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exception of Linn and Minnehaha Counties who have a higher participation rate, Shawnee County is similar to the other benchmark communities. (Figure 15 and Table 9).

Just 37 and 41 percent of families<sup>2</sup> in Topeka and Shawnee County have two income earners (*Married, husband and wife in labor force*), which is well below Linn and Minnehaha Counties. Minnehaha County has the highest number of married families and total families overall participating in the labor force (Figure 16 and Table 10). Topeka has the highest number of *Female Householder in Labor Force, no husband present*; however, it has the lowest percentage of families in the labor force.

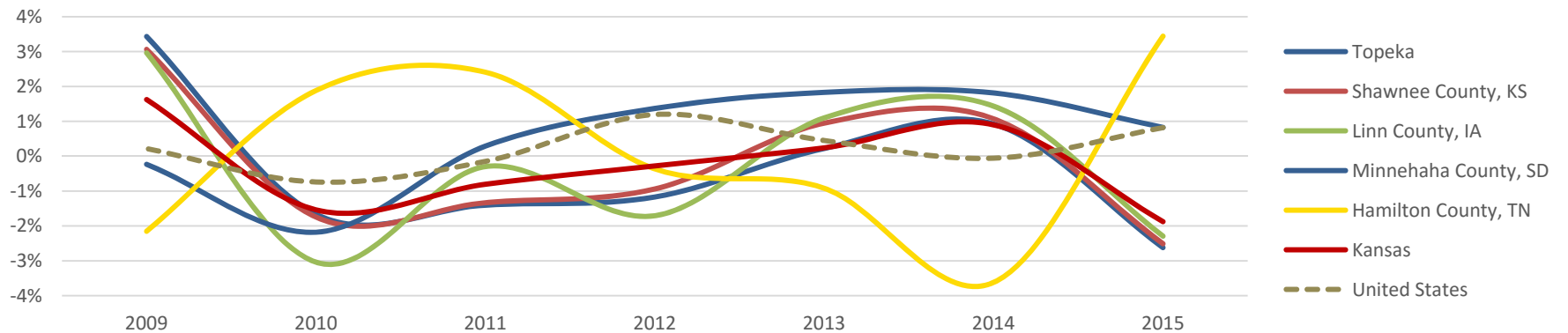
**Figure 13**  
*Unemployment Rate*  
June 2015 Monthly Estimates



Source: Bureau of Labor Statistics, Garner Economics  
Preliminary figures for city and county-level data

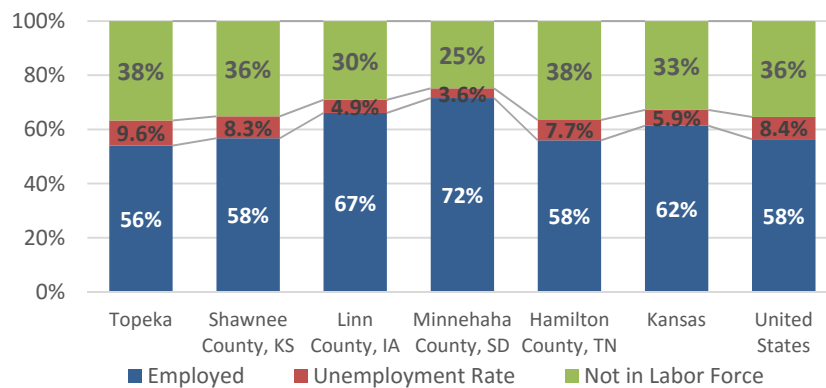
<sup>2</sup>A family consists of a householder (the person or one of the people in whose name the home is owned or rented) and one or more other people living in the same household related to the householder by birth, marriage, or adoption.

**Figure 14**  
*Labor Force Size Change*  
June 2009 - June 2015 Year Over Year



Source: Bureau of Labor Statistics, Garner Economics  
Preliminary figures for city and county-level data June 2015

**Figure 15**  
*2013 One-Year Estimates*  
*Employment Status of Population 16+*

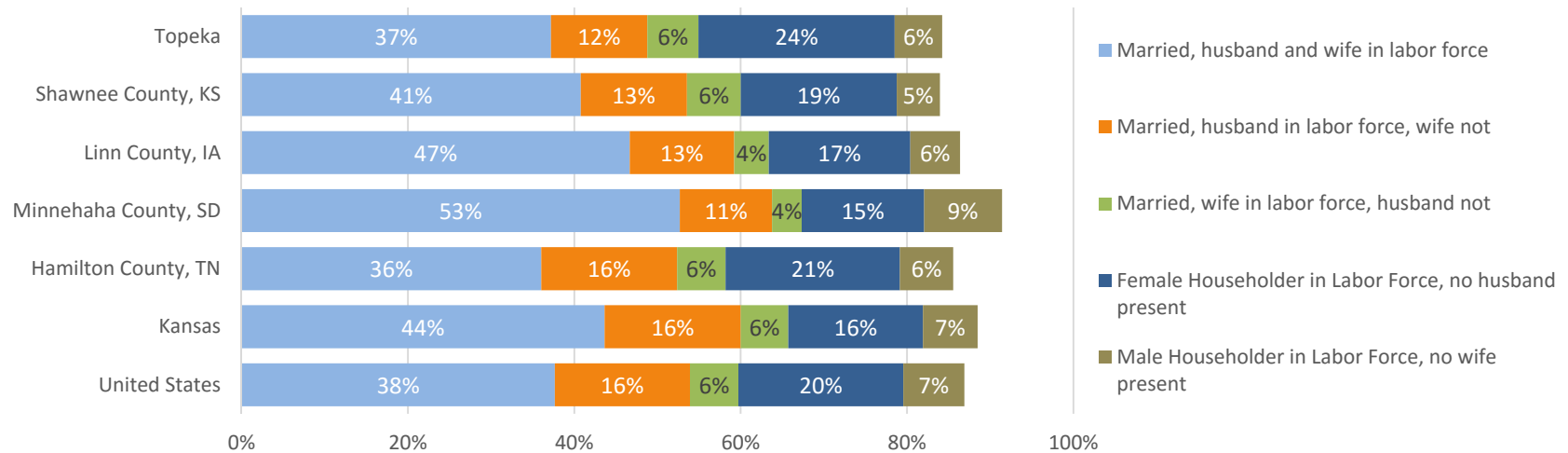


**Table 9**  
*2013 One-Year Estimates*  
*Employment Status*  
*Highest Relative Rates Shaded*

	Employed	Unemployment Rate	Not in Labor Force
Topeka	56%	9.6%	38%
Shawnee County, KS	58%	8.3%	36%
Linn County, IA	67%	4.9%	30%
Minnehaha County, SD	72%	3.6%	25%
Hamilton County, TN	58%	7.7%	38%
Kansas	62%	5.9%	33%
United States	58%	8.4%	36%

Source: US Census Bureau, Garner Economic

**Figure 16**  
2013 One-Year Estimates  
Employment Status  
Percentage of All Families



**Table 10**  
2013 One-Year Estimates  
Employment Status  
Percentage of All Families  
Highest Relative Rates Shaded

	Topeka	Shawnee County, KS	Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
<b>Married-Couple Families</b>							
Married, husband and wife in labor force	37%	41%	47%	53%	36%	44%	38%
Married, husband in labor force, wife not	12%	13%	13%	11%	16%	16%	16%
Married, wife in labor force, husband not	6%	6%	4%	4%	6%	6%	6%
<b>Other Families</b>							
Female Householder in labor force, no husband present	24%	19%	17%	15%	21%	16%	20%
Male Householder in labor force, no wife present	6%	5%	6%	9%	6%	7%	7%
<b>Total Families in Labor Force</b>	<b>84%</b>	<b>84%</b>	<b>86%</b>	<b>91%</b>	<b>86%</b>	<b>88%</b>	<b>87%</b>

Source: US Census Bureau, Garner Economics



## Employment Change

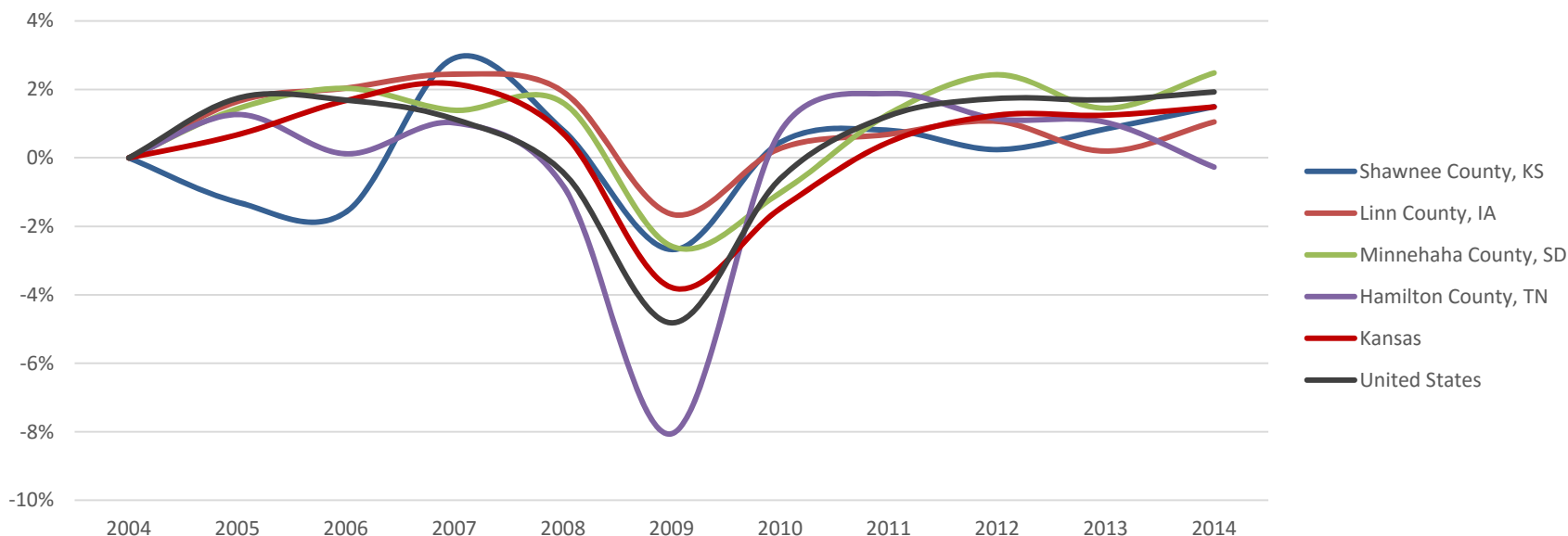
Employment trends over the last decade have experienced change with the recession beginning in 2008, showing the greatest decline in employment among all geographies. Over the entire decade, most benchmarks averaged a modest 1 to 2 percent annual growth rate even taking into consideration the recession effects on employment. Hamilton County is the only community with an overall negative growth rate over the past decade and Minnehaha County increasing 11 percent over the 10-year span. Shawnee County grew its employment 2 percent over this time period (Table 11 and Figure 17).

**Table 11**  
2004 – 2014 Employment Change

	2004-2014 Change	Average Annual Change
Shawnee County, KS	2%	1%
Linn County, IA	10%	1%
Minnehaha County, SD	11%	2%
Hamilton County, TN	-2%	-0.3%
Kansas	5%	1%
United States	6%	2%

Source: Bureau of Labor Statistics, Garner Economics

**Figure 17**  
2004-2014 Estimates  
Annual Average Change in Employment



Source: Bureau of Labor Statistics, Garner Economics

## Self-Employment

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.

In 2013, 4.8 and 5.7 percent of workers in Topeka and Shawnee County were self-employed. The proportion is significantly below the state, the nation, and the remaining benchmark geographies (Figure 18 and Table 12).

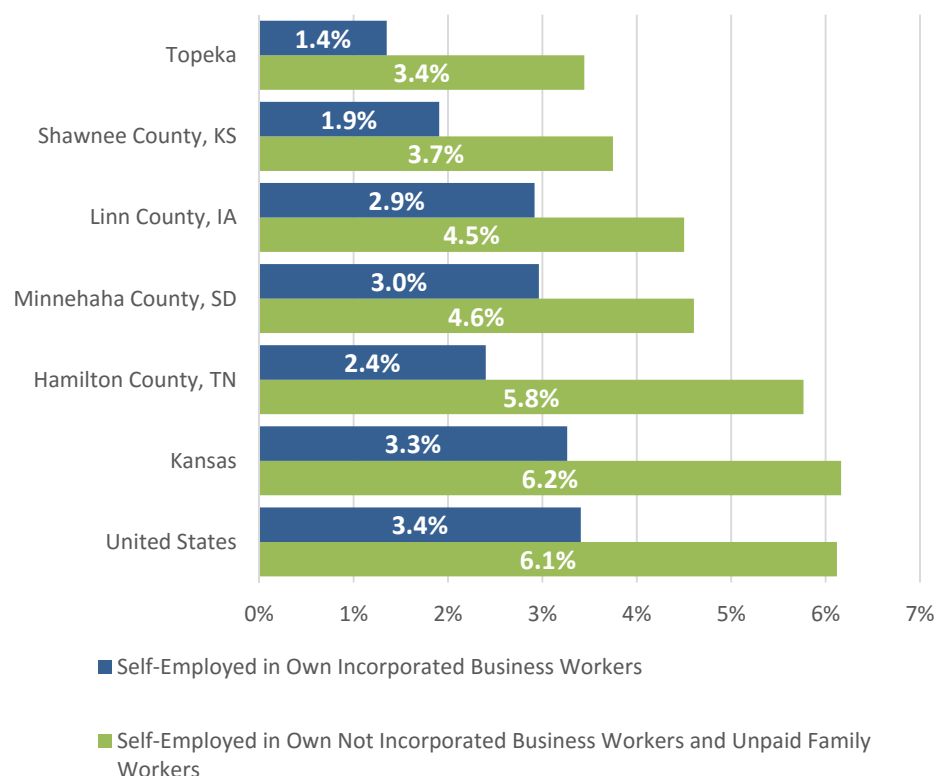
Median earnings among those workers classified as *Self-Employed in Own Incorporated Business* were \$70,608 in Shawnee County, the highest for all areas. Those in the *Self-Employed in Own Not Incorporated Business* category in Topeka earned the lowest figure—\$19,696—and in Shawnee County, this figure was lower than the state but higher than the national average (Figure 19).

**Table 12**  
2013 One-Year Estimates  
*Self-Employed as a Percentage of Workers 16 Years+*  
Highest Relative Number Shaded

	Self-Employed – Incorporated	Self-Employed - Not Incorporated & Unpaid Family Workers	Self-Employed total
Topeka	1.4%	3.4%	4.8%
Shawnee County, KS	1.9%	3.7%	5.7%
Linn County, IA	2.9%	4.5%	7.4%
Minnehaha County, SD	3.0%	4.6%	7.6%
Hamilton County, TN	2.4%	5.8%	8.2%
Kansas	3.3%	6.2%	9.4%
United States	3.4%	6.1%	9.5%

Source: US Census Bureau, Garner Economics

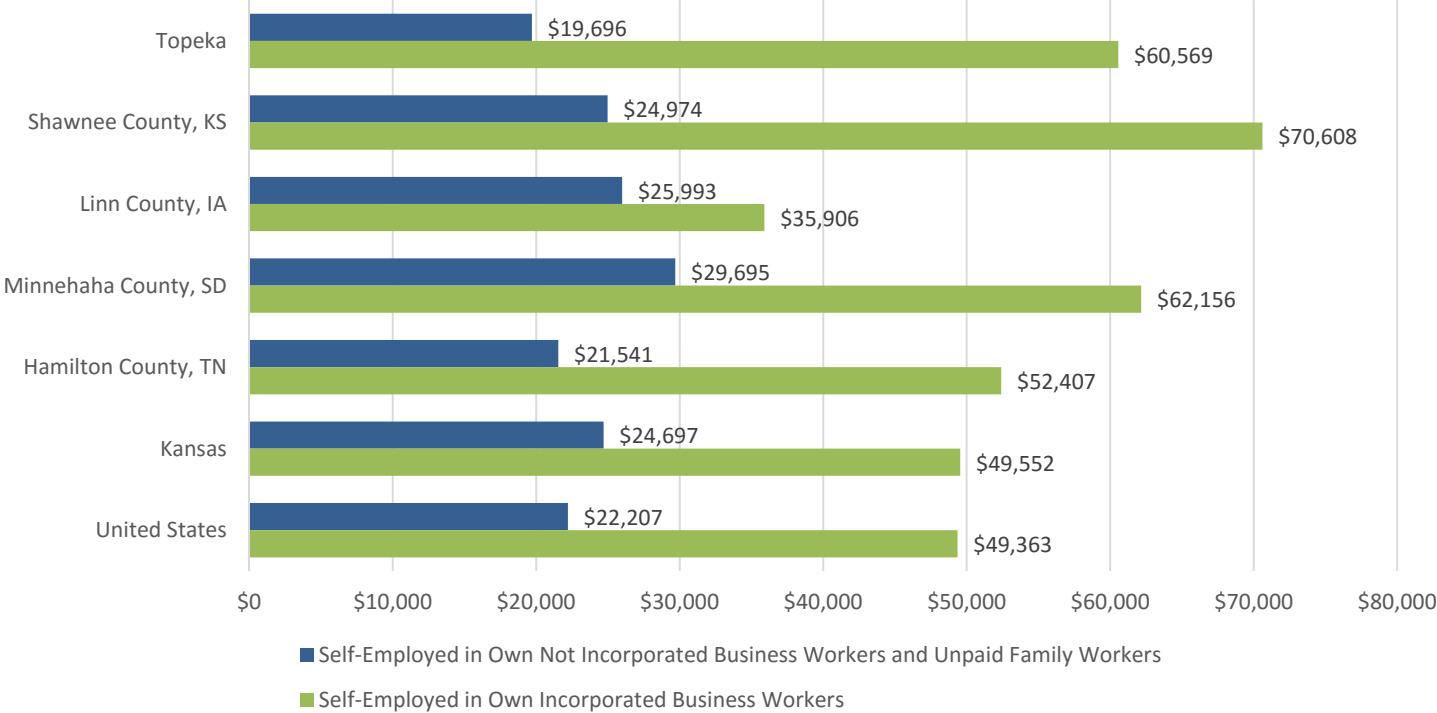
**Figure 18**  
2013 One-Year Estimates  
*Self-Employed as a Percentage of Workers 16 Years+*



Source: US Census Bureau, Garner Economics



**Figure 19**  
*2013 One-Year Estimates  
Median Earnings  
Self-Employed Workers 16 Years+*



Source: US Census Bureau, Garner Economics

### Startup Firms

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.

For an equal view of startups, the benchmark metro areas were reviewed to measure new businesses. As the only metro-level view of the study, due to similar data available for all areas, this metric is an indicator of positive economic activity.

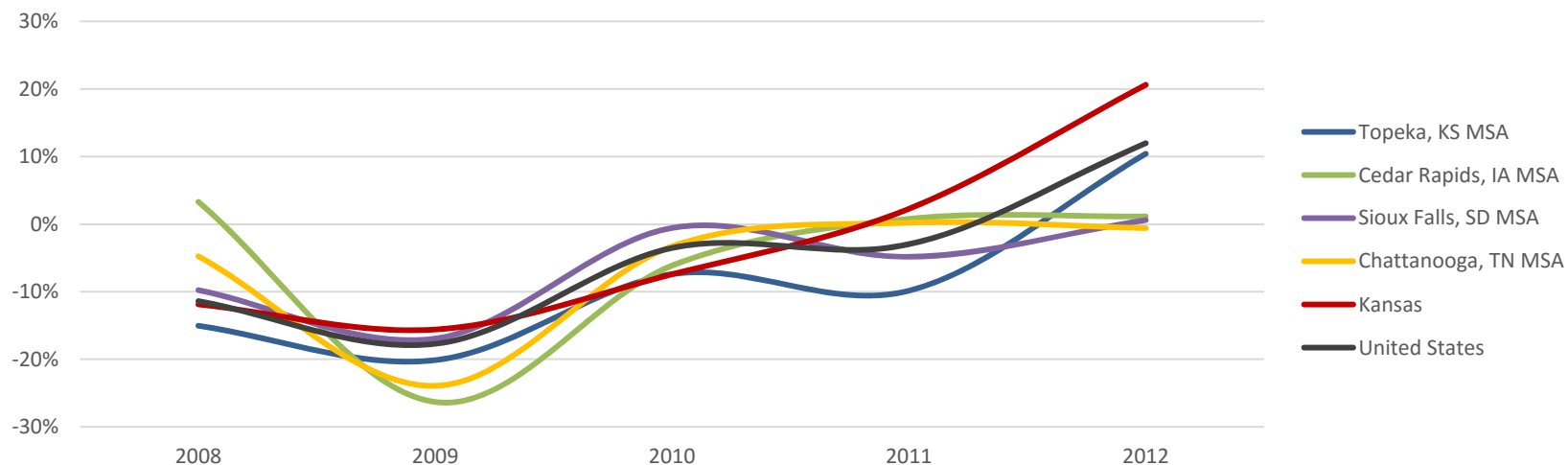
Chattanooga MSA consistently had the most startups among benchmark communities; however, its annual growth rate has leveled off along with Cedar Rapids MSA (Table 13 and Figure 20). Topeka MSA grew in the number of startups from 2011 to 2012, similar to Kansas and the United States.

**Table 13**  
2008-2012 Startup Firms  
Highest Relative Number Shaded (Comparing MSAs only)

	2008	2009	2010	2011	2012
Topeka, KS MSA	288	230	213	192	212
Cedar Rapids, IA MSA	376	277	260	262	265
Sioux Falls, SD MSA	425	353	351	334	336
Chattanooga, TN MSA	681	518	501	502	499
Kansas	5154	4350	4027	4118	4967
United States (in thousands)	9,841	8,097	7,812	7,578	8,486

Source: US Census Bureau, Business Dynamics Statistics, Garner Economics

**Figure 20**  
2008-2012 Annual growth rate of Startups



Source: US Census Bureau, Business Dynamics Statistics, Garner Economic

## CHAPTER 5: INCOME & ECONOMIC DYNAMICS

### Estimated Average Weekly Wage



In 2014, the estimated average weekly wage per job in Shawnee County was \$801<sup>3</sup>, the lowest among all benchmarks (Figure 21). Wages in this series reflect employment-based workers who are not necessarily residents of the County.

Shawnee County weekly wages grew 25% over the past decade (\$161 increase); however, this figure was still the lowest growth rate for all geographies (Table 14).

Hamilton County had the largest growth while the national figure for weekly wages was the highest. States that have raised minimum wage levels may be bolstering the national level relative to communities that have more historical minimum wage levels.

Shawnee County followed the general growth trend (Figures 22 and 23), deviating in 2012 and 2013 with a slower rate.

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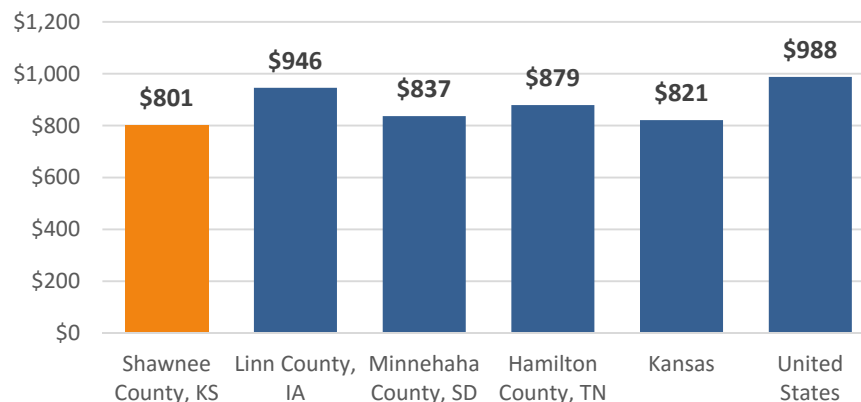
<sup>3</sup> Based on total wage and salary disbursements divided by the number of wage and salary jobs (total wage and salary employment) as reported by the Bureau of Labor Statistics Quarterly Census of Employment and Wages.

**Table 14**  
**2004-2014 Change in Estimated Average Weekly Wage**  
**Highest Relative Number Shaded**

	2014 Weekly Wage	Change 2004-2014	
		\$	%
Shawnee County, KS	\$801	\$161	25%
Linn County, IA	\$946	\$223	31%
Minnehaha County, SD	\$837	\$210	33%
Hamilton County, TN	\$879	\$224	34%
Kansas	\$821	\$191	30%
United States	\$988	\$231	31%

Source: Bureau of Labor Statistics, US Census Bureau, Garner Economics

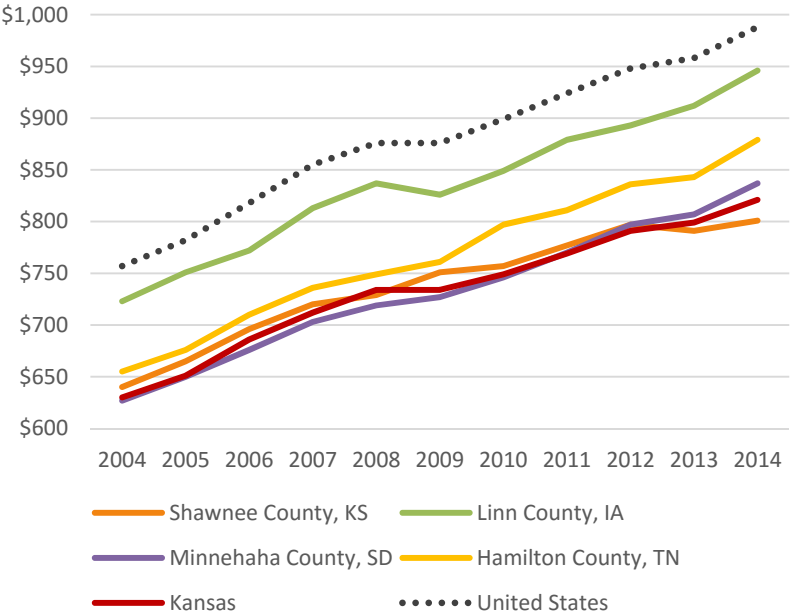
**Figure 21**  
**Estimated Average Weekly Wage—2014**



Source: Bureau of Labor Statistics, US Census Bureau, Garner Economics

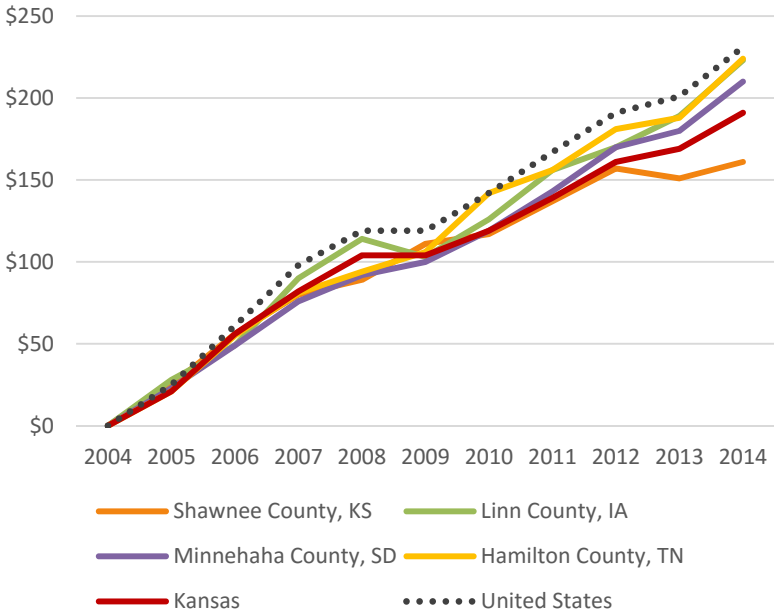


**Figure 22**  
*Ten-Year Estimated Average Weekly Wage*



Source: Bureau of Labor Statistics, US Census Bureau, Garner Economics

**Figure 23**  
*2004-2014 Change in Estimated Average Weekly Wage  
2004=0*

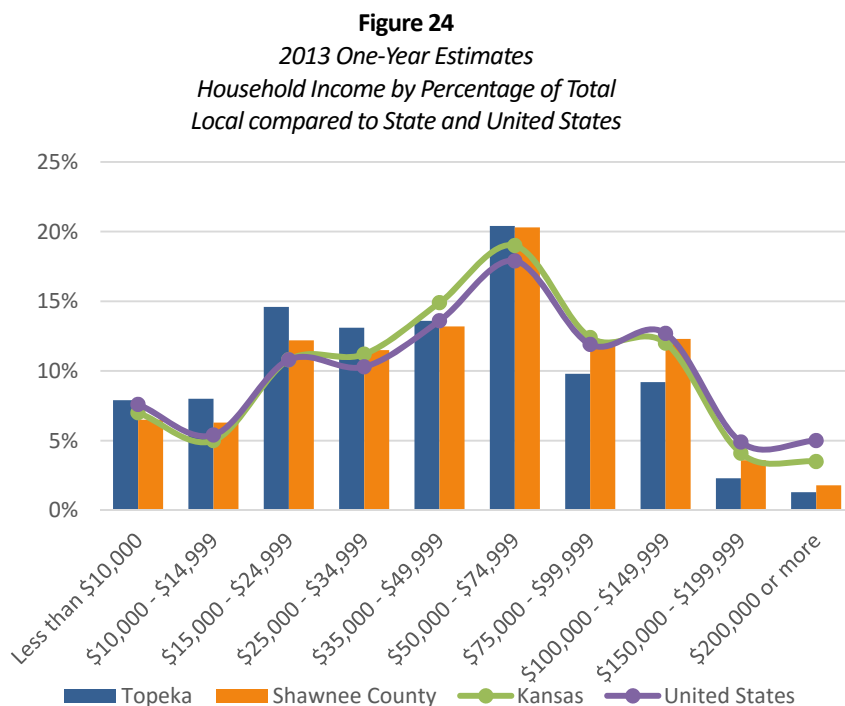


Source: Bureau of Labor Statistics, US Census Bureau, Garner Economics

## Household Income

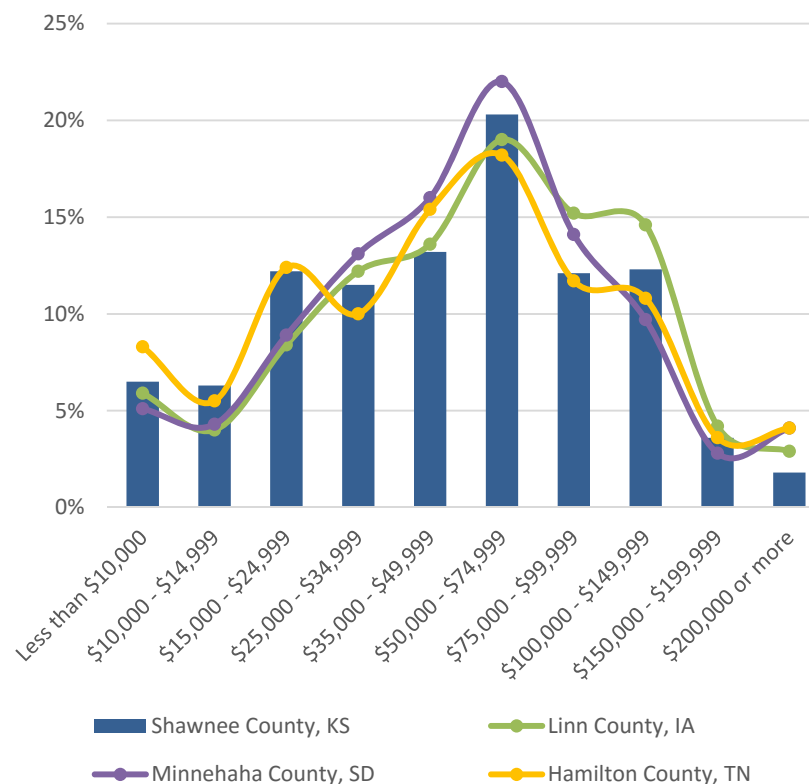
Compared to the nation, the state, and both benchmark communities, Topeka has the highest share of households with incomes in three lower income categories from \$10,000 to \$34,999 (Table 15).

Both Topeka and Shawnee County follow the trend of the other benchmark communities, Kansas, and the nation of income distribution (Figures 24 and 25), ranking slightly higher in the lower income categories, dropping with the two highest income category levels of the state and nation. However Topeka and Shawnee County were second only to Minnehaha County in the \$50,000 to \$74,999 category.



Source: Census Bureau, Garner Economics

**Figure 25**  
2013 One-Year Estimates  
Household Income by Percentage of Total  
Benchmark Communities



Source: US Bureau of Labor Statistics, Garner Economic

**Table 15**  
2013 One-Year Estimates  
Household Income  
By Percentage of Total  
*Highest Relative Rates Shaded*

	Topeka	Shawnee County, KS	Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
Less than \$10,000	7.9%	6.5%	5.9%	5.1%	8.3%	7.0%	7.6%
\$10,000 to \$14,999	8.0%	6.3%	4.0%	4.3%	5.5%	5.0%	5.4%
\$15,000 to \$24,999	14.6%	12.2%	8.4%	8.9%	12.4%	10.8%	10.8%
\$25,000 to \$34,999	13.1%	11.5%	12.2%	13.1%	10.0%	11.2%	10.3%
\$35,000 to \$49,999	13.6%	13.2%	13.6%	16.0%	15.4%	14.9%	13.6%
\$50,000 to \$74,999	20.4%	20.3%	19.0%	22.0%	18.2%	19.0%	17.9%
\$75,000 to \$99,999	9.8%	12.1%	15.2%	14.1%	11.7%	12.4%	11.9%
\$100,000 to \$149,999	9.2%	12.3%	14.6%	9.7%	10.8%	12.0%	12.7%
\$150,000 to \$199,999	2.3%	3.6%	4.2%	2.8%	3.6%	4.1%	4.9%
\$200,000 or more	1.3%	1.8%	2.9%	4.1%	4.1%	3.5%	5.0%

Source: US Census Bureau, Garner Economics



### Per Capita Income

Per capita income is the mean annual income<sup>4</sup> computed for every man, woman, and child, and it is derived by dividing the aggregate income by the total population. Unlike the previously examined estimated weekly wage, per capita income is a measure for all residents, regardless of where they work.

For 2013, the per capita incomes in Topeka and Shawnee County were \$23,513 and \$25,156. Both were lower than all benchmarks (Figure 26 and Table 16). These figures are 17 and 11 percent, respectively, below the national per capita income; 13 and 7 percent below the Kansas per capita income.

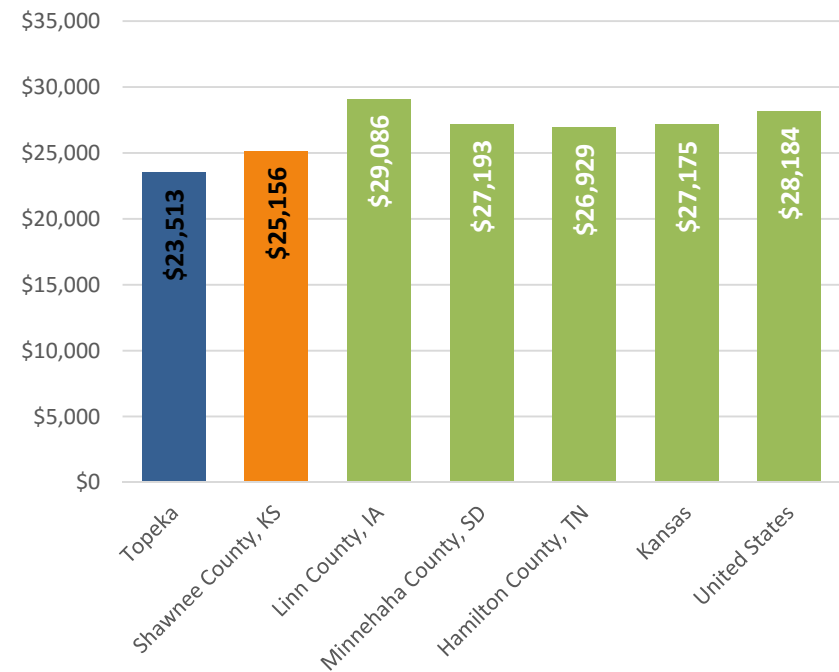
**Table 16**  
2013 One-Year Estimates  
Per Capita Income  
Highest Figure Shaded

	Per Capita Income
Topeka	\$23,513
Shawnee County, KS	\$25,156
Linn County, IA	\$29,086
Minnehaha County, SD	\$27,193
Hamilton County, TN	\$26,929
Kansas	\$27,175
United States	\$28,184

Source: US Census Bureau, Garner Economics

<sup>4</sup> Income is the sum of the amounts reported separately for wage or salary income; net self-employment income; interest, dividends, net rental, or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

**Figure 26**  
2013 One-Year Estimates  
Per Capita Income



Source: US Census Bureau, Garner Economics

## Poverty

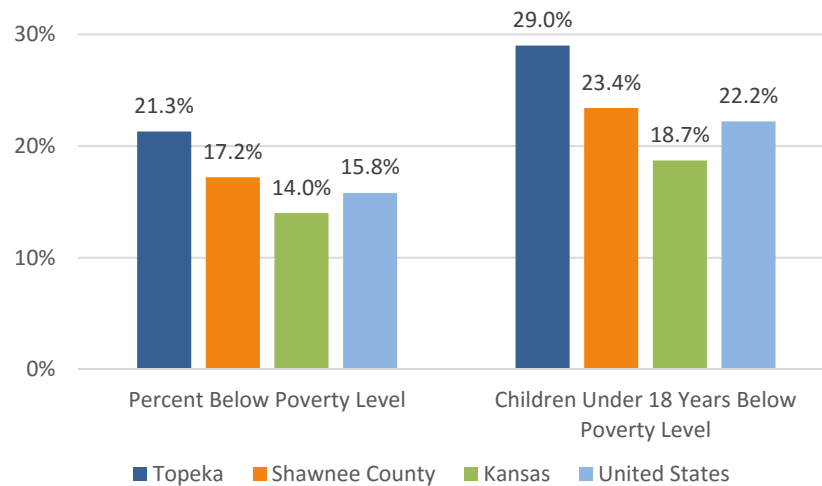
The measurement of poverty in a community helps to evaluate the well-being of the citizens and of the economy. Poverty levels for Topeka were higher than the other benchmarks; however, Shawnee County was slightly lower with 17.2 percent below poverty level and 23.4 percent of children below poverty (Table 17, Figures 27 and 28).

**Table 17**  
2013 One-Year Poverty Estimates  
Highest Figure Shaded

	Percent below poverty level	Children Under 18 below poverty level
Topeka	21.3%	29.0%
Shawnee County	17.2%	23.4%
Linn County, IA	9.3%	10.4%
Minnehaha County, SD	10.8%	14.0%
Hamilton County, TN	17.1%	27.1%
Kansas	14.0%	18.7%
United States	15.8%	22.2%

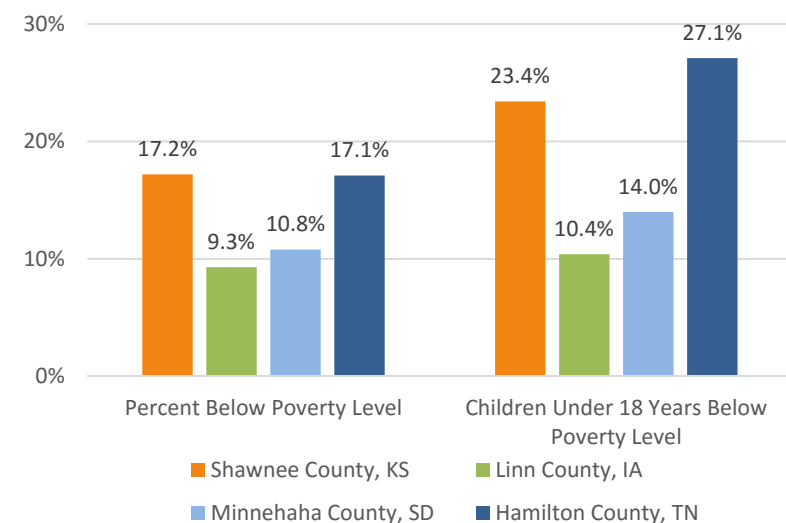
Source: US Census Bureau, Garner Economics

**Figure 27**  
2013 One-Year Estimates  
Percent Population below Poverty Level  
Local compared to State and United States



Source: US Census Bureau, Garner Economics

**Figure 28**  
2013 One-Year Estimates  
Percent Population below Poverty Level  
Benchmark Communities

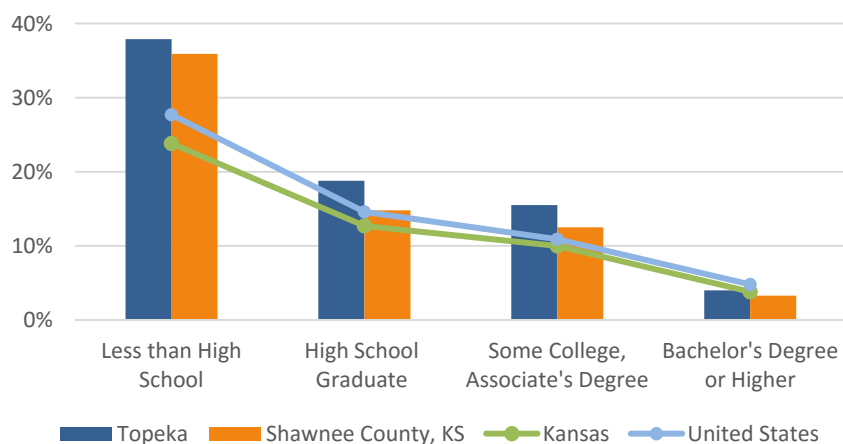


Source: US Census Bureau, Garner Economics

### Poverty by Educational Attainment

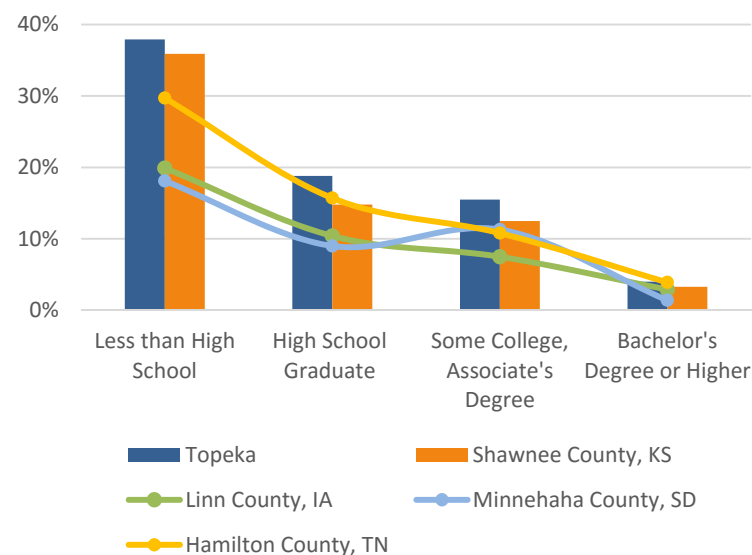
Levels of education and poverty levels are closely related and show the likelihood of decreasing poverty with education. All geographies show the general trend of more poverty experienced by those with less education (Figures 29 and 30). Topeka has the highest number below the poverty level with its urban concentration. As we compare benchmark communities, we see that Shawnee County is comparable when we look at those above a *High School* education

**Figure 29**  
2013 One-Year Estimates  
Educational Attainment by Poverty Level  
Local compared to State and United States



Source: US Census Bureau, Garner Economics

**Figure 30**  
2013 One-Year Estimates  
Educational Attainment by Poverty Level  
Benchmark Communities



Source: US Census Bureau, Garner Economics



**Table 18**  
2013 One-Year Estimates  
Educational Attainment by Poverty Level  
Highest Figure Shaded

Percent below poverty level	Topeka	Shawnee County, KS	Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
Less than High School Graduate	37.9%	35.9%	19.9%	18.1%	29.7%	23.8%	27.7%
High School Graduate (includes equivalency)	18.8%	14.8%	10.4%	9.0%	15.7%	12.7%	14.6%
Some College, Associate's Degree	15.5%	12.5%	7.5%	11.3%	10.8%	10.0%	10.9%
Bachelor's Degree or Higher	4.0%	3.3%	2.9%	1.4%	3.9%	3.8%	4.8%

Source: US Census Bureau, Garner Economics

### Median Earnings by Educational Attainment

Among residents ages 25 and over, both Topeka and Shawnee County have lower median earnings than all other geographies for the *Less than High School* education level; however, median earnings for the region are closer to other benchmark communities for *High School Graduate*, *Associate's Degree*, and *Bachelor's Degree* categories. Linn County has the highest income for all levels except the *High School Graduate* category. (Table 19, Figures 31 and 32).

**Table 19**  
2013 One-Year Estimates  
Median Earnings by Educational Attainment, Ages 25+  
Highest Relative Number Shaded

	Topeka	Shawnee County, KS	Linn County, IA	Minnehaha County, SD	Hamilton County, TN	Kansas	United States
Less than High School Graduate	\$16,260	\$16,383	\$24,906	\$21,468	\$17,678	\$22,246	\$20,149
High School Graduate (includes equivalency)	\$25,344	\$29,352	\$27,422	\$30,950	\$27,232	\$28,118	\$27,350
Some College or Associate's Degree	\$31,166	\$32,948	\$36,306	\$31,143	\$31,629	\$31,165	\$32,387
Bachelor's Degree	\$44,755	\$46,695	\$50,174	\$36,825	\$43,126	\$45,216	\$50,050
Graduate or Professional Degree	\$48,984	\$50,748	\$67,403	\$54,554	\$61,327	\$56,929	\$65,565

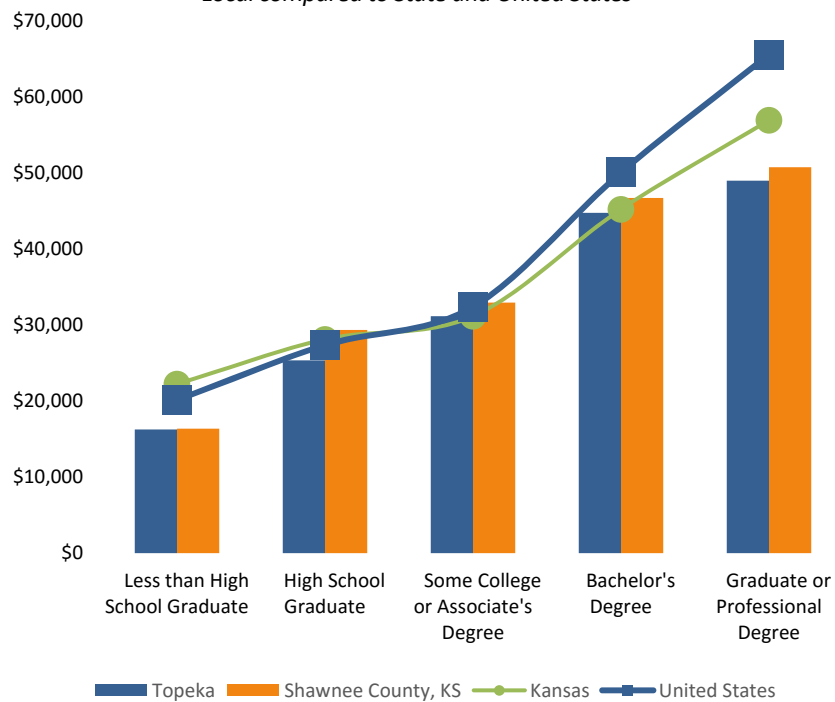
Source: US Census Bureau, Garner Economics



**Figure 31**

2013 One-Year Estimates

Median Earnings by Educational Attainment, Ages 25+  
Local compared to State and United States

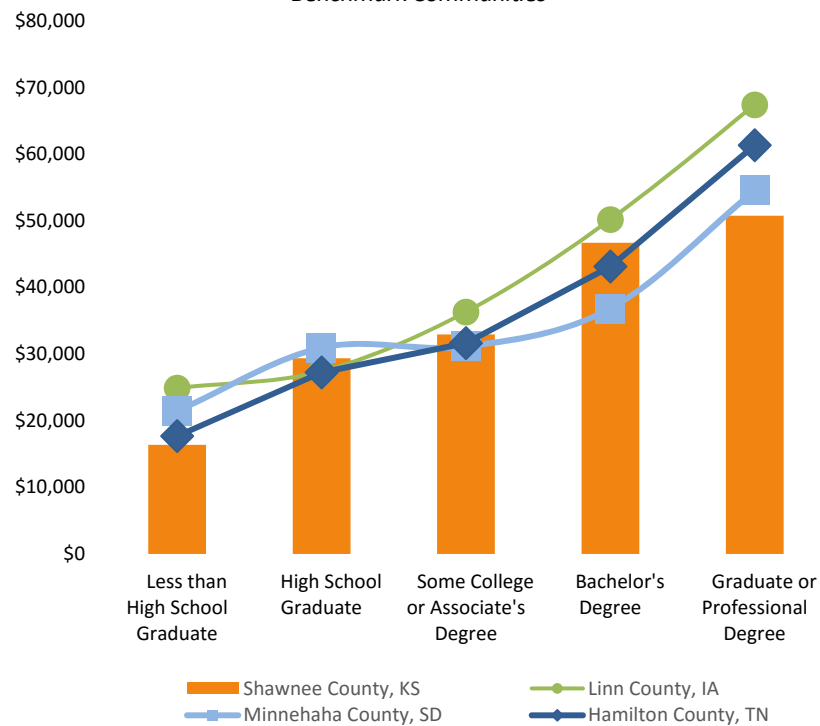


Source: US Census Bureau, Garner Economics

**Figure 32**

2013 One-Year Estimates

Median Earnings by Educational Attainment, Ages 25+  
Benchmark Communities



Source: US Census Bureau, Garner Economics

### Cost of Living

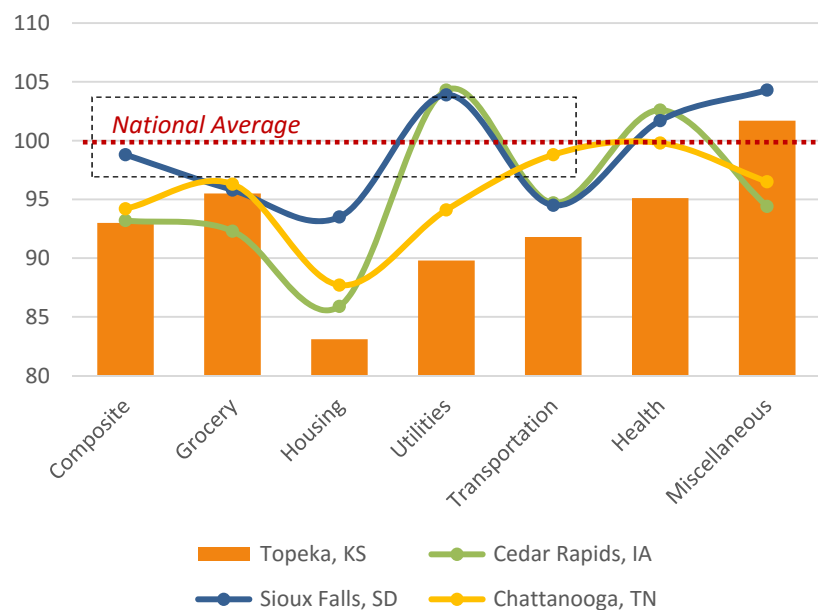
The 2015 composite cost-of-living index for Topeka is 93, below the national average of 100. This is the lowest cost of living for all benchmark communities (Table 20 and Figure 33). Topeka ranks below the national level for all categories measured in the Cost-of-Living Index with the exception of the *Miscellaneous* category. Of note is that Topeka's housing costs are significantly lower than the national average.

**Table 20**  
*Metro-Level Cost-of-Living Index*  
2015

	Topeka, KS	Cedar Rapids, IA	Sioux Falls, SD	Chattanooga, TN
Composite	93	93.2	98.8	94.2
Grocery	95.5	92.3	95.8	96.3
Housing	83.1	85.9	93.5	87.7
Utilities	89.8	104.3	103.9	94.1
Transportation	91.8	94.7	94.5	98.8
Health	95.1	102.6	101.7	99.8
Miscellaneous	101.7	94.4	104.3	96.5

Source: C2ER Cost of Living Index, Garner Economics

**Figure 33**  
*Metro-Level Cost-of-Living Index*  
Second Quarter 2015



Source: C2ER Cost of Living Index, Garner Economics

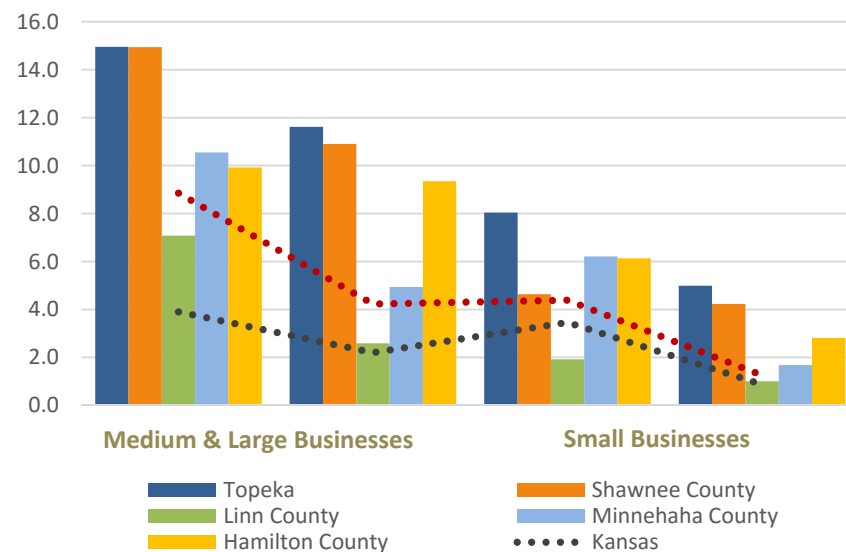
## Broadband

According to the National Telecommunications and Information Administration, households in Topeka have very good access to DSL or Cable service with 97 percent—this is the highest Cable availability across all geographies. (Figure 34 and Table 21). Linn County has the highest DSL access at 100 percent (or more precisely 99.97%).

With Internet access in an urban environment more likely, Topeka has fast download and upload times with the fastest speed for *Medium and Large Business* and *Small Business*. Shawnee County ranks well for speed with 14.9 Median Download for *Medium and Large Business* and 10.9 Median Download for *Small Business*—these are both second only to Topeka when measured separately.

Although Chattanooga has become known as the first city in the Western Hemisphere to offer one-gigabit-per-second fiber Internet service, this speed is concentrated downtown and is not countywide as yet. This extremely fast Internet downtown is responsible for a high rate of startups and other entrepreneurial activity.

**Figure 34**  
2014 Broadband Speeds (Mbps)



Source: National Telecommunications and Information Administration

**Table 21**  
2014 Broadband Availability & Speed  
Highest Relative Figure Shaded

	Topeka	Shawnee County	Linn County	Minnehaha County	Hamilton County	Kansas	Nationwide
<b>Availability</b>							
DSL	97.1%	92.6%	100.0%	86.2%	94.6%	86.2%	90.0%
Cable	97.0%	91.8%	91.9%	87.8%	96.4%	83.1%	88.8%
Two or More Wireline Providers	96.3%	89.5%	99.4%	84.6%	97.9%	81.2%	88.2%
<b>Speed (megabytes per second or Mbps)</b>							
<b>Medium &amp; Large Businesses</b>							
Median Download	15.0	14.9	7.1	10.6	9.9	3.9	8.9
Median Upload	11.6	10.9	2.6	4.9	9.4	2.2	4.2
<b>Small Business</b>							
Median Download	8.0	4.6	1.9	6.2	6.1	3.5	4.4
Median Upload	5.0	4.2	1.0	1.7	2.8	0.9	1.3

Source: National Telecommunications and Information Administration





## ABOUT OUR COMPANY



Garner Economics, LLC provides innovative economic and community development solutions in a competitive global

market. We offer site selection, analytical research, industry targeting, strategic planning, and organizational development with a wealth of expertise to companies, communities, and organizations globally. Garner Economics is based in Atlanta, Georgia and has representative offices in both Europe and Asia.

Since 2003, Jay Garner, a 35-year internationally recognized expert in the economic development, chamber of commerce, and site location consulting professions has headed our team, which is rounded out by talented experts with CEcD, CCE, and CFRE designations as well as a nationally known research economist.

Cyndi Dancy, research economist for Garner Economics (cyndi@garnereconomics.com), served as the author of the economic analysis. Tina Valdecanas, Senior Associate and Strategist for Garner Economics (tina@garnereconomics.com), led the community engagement sessions and analysis. Jay Garner (jay@garnereconomics.com) served as the project leader and facilitator for the focus groups.

## APPENDICES

### *Appendix A: Focus Group Participants*

#### **Large Employers**

Roger Aeschliman  
Elizabeth Barranco, Capitol Federal  
Katie Beach  
Brad Blankenship  
Michele Cole  
Ken Daniel, Midway Wholesale  
Neil Dobler, Bartlett & West  
Pat Doran, FHLBank Topeka  
Neil Fisher, KBS Construction  
Cody Foster, Advisors Excel  
Scott Griffith, Intrust Bank  
Alonzo Harrison, HDB Construction  
Jason Hoffman, Corefirst  
Mark Ruelle, Westar Energy  
Jeff Russell  
Joshua Schumm, Payless  
Keith Warta, Bartlett and West  
Wendy Wells, US Bank  
Lonnie Williams, L & J Building Maintenance  
Krystal Wiltz, The Home Depot Distribution Center

#### **Small/Mid-Sized Employers**

Martha Bartlett-Piland, MB Piland Advertising & Marketing  
Alan Cobb  
Connie Cook, Marion Lane Candles  
Helen Crow, Kirk and Cobb Realty  
Mary Cuevas, School House Rentals  
Tara Dimick, E2 Communications  
Pat Gideon, Silver Lake Bank  
Kurt Kutta  
James Lord, Lord's Financial Planning  
Mitch Miller, Dynamic Computer Solutions  
Mike Morris  
Mark Murnahan, Mad Eliza's Cakes & Confections  
Diana Ramirez, Express Employment Professionals  
Fred Sanders  
Allan Towle, Fidelity State Bank  
Phil Tysinger, Tysinger & Assoc  
Bruce Woner, Woner, Glenn, Reeder & Girard, P.A.

### **Nonprofit/Other EDOs**

Linda Briden, Topeka Area Association of Realtors, Inc.  
Webb Garlinghouse, Lake Edun  
Marilyn Harp, Kansas Legal Services  
Amy Hyten, The Topeka Independent Living Resource Center, Inc.  
Nancy Johnson  
Orion Jordan, League of Women Voters  
G.R. Laughlin, Community Resource Council  
Dawn McWilliams, Boys and Girls Club  
Brett Oetting, Visit Topeka  
Marsha Pope, Topeka Community Foundation  
Kimberly Ribelin, United Way  
Marilyn Stanley, Housing and Credit Counseling, Inc.  
Kristin Stock, Valeo - Service for Employment Success  
Keith Tatum, CASE  
Ivan Weichert, Topeka Home Builders

### **Academia and Workforce**

Tammie Austin, Topeka Public Schools  
Ronald Brown  
Ben Coates  
Clark Coco, Washburn Institute of Technology  
Kristina Dietrick, Creative Business Solutions  
Cheryl Fewell, Teacher  
Dr. Julie Ford, Topeka Public Schools  
Sean Frost, WU Endowment/United Way/Young Professional  
Don Gifford, KSDE  
Lazone Grays Jr., IBSA , Inc.  
Dr. Cynthia Hornberger, Washburn University - BTC  
Ron Keefover  
Sherry Lundry, TARC  
Scott May  
Candis M. Meerpohl, Shawnee County Extension  
Gina Millsap, Topeka and Shawnee County Public Library  
Beryl New, Highland Park High School  
Larry Robbins, Topeka Public Schools  
Dennis Rogers  
Timothy Royer, Fidelity State Bank  
David Sollars, Washburn University  
Andy Tompkins  
Karen Wagaman, KS Society of CPAs  
Patrick Wood, Topeka Public Schools

### **Government and Elected Officials**

Alice Weingartner, Shawnee County Health Agency - Community Health Center  
Rep. Ann Kuether, Kansas Legislature  
Betty Griener, Shawnee County  
Cathy Walker, City of Topeka Probation  
Chad Taylor, District Attorney  
Ed O'Rear, Shawnee County Community Corrections  
Jack Woelfel, Former City Councilman  
Janet Mitchell  
John Alcala, Representative  
Kent Schumaker, VA Hospital - Veterans Placement  
Kiley Rice, Shawnee County Sheriff  
Marshall Kennedy, State of Kansas  
Nathan Schmidt, State of Kansas  
Pamela Hann, State of Kansas Workforce Center  
Rebecca Cartmill, Shawnee County Corrections  
Rhonda Harris, Kansas Department of Commerce  
Susie Beninga  
Tara Mays, The Mays Group  
Tina Delarosa, Kansas Department Of Labor  
William Kahrs  
Rep. Annie Tietze  
Lana Gordon  
Sheriff Jones

### **Other Partners**

Marge Ahrens, League of Women Voters  
William Beteta, Schendel Lawn/Community Vision Project  
Dan Brennan, MoveOn  
Ed Callazo  
James Cates  
Eric Claspill  
Dr. Robert Conroy  
Rick Friedstrom  
Vince Frye, Downtown Topeka, Inc.  
Tom Hagen, Capitol Federal Savings  
Lee Hartman  
Linda Jeffrey  
Joseph Ledbetter, Ledbetter Law/Citizens for Accountability in Government  
Carol Marple, Citizens for Accountability in Government  
Melissa Masoner  
Judy Moler  
Stephanie Mott  
Camille Nohe  
Gabriel O'Shea  
Fred Patton, Patton Law Office  
Rev. Ben Scott, Sr., NAACP  
Jared Starkey, 712 Innovations  
Clark Trammell, TMTA  
Tina Williams, MANA de Topeka  
Patty Wiltz  
Tim Zurawski

### *Appendix B: Focus Group Questions*

1. What are several words or phrases that describe JEDO?
2. What are several words or phrases that describe GO Topeka, the agent for JEDO?
3. What do you think are some of the biggest obstacles that inhibit the community's ability to attract, expand, grow, or retain businesses and investment?
4. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of Shawnee County? City of Topeka?
5. What do you see as the City/County's strengths?
6. What infrastructure is missing or unsatisfactory in the County/City?
7. What would you work to change about the community, not worried about money or politics?
8. Give some examples of unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the County/City?
9. Are there programs in peer/competitor regions that JEDO should consider for this area? If so, give examples.
10. What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved?
11. Are there any other issues of concern to you?



***Appendix C: Public Listening Session Speakers***

Ned Nusbaum  
Latonia Wright  
Clark Trammell  
Carol Marple  
Thomas Padgett  
Joe Ledbetter  
Janet Staneck  
Lazone Grays  
Scott Griffith  
Tim Zurawski  
Wendy Wells  
Sylvester Rice

## *Appendix D: Survey Questions*

The Joint Economic Development Organization (JEDO) is a public body representing the City and County governments of Topeka and Shawnee County, Kansas. JEDO's role is to oversee the use of several millions of dollars per year from a sales tax dedicated to economic development. JEDO contracts with an organization named GO Topeka for economic development service delivery. JEDO has engaged Garner Economics LLC, an economic development strategy and location advisory firm, to conduct an economic development analysis to enhance economic development service delivery in the City and County. A vital part of this process is this survey, which seeks to solicit input on the current state of economic development in the City and County. Your feedback is essential as we look to ways to leverage and enhance the area's economic development activities. Many of the multiple choice options were developed based on the majority of the responses received during recent focus groups with more than 125 local participants. However, you have an option to add other comments for each question. The survey should take no more than 10 to 15 minutes to complete. For your responses to be included in our analysis, please submit your survey no later than 5:00 PM CST on September 10, 2015. Your survey responses will be strictly confidential, and data from this research will be reported only in the aggregate.

Please indicate the zip code for your place of residence:

Please indicate the zip code for your place of employment:

### **Perceptions of Topeka and Shawnee County**

The following questions are being asked to gauge your perception of Topeka and Shawnee County as a place to live and do business. When responding, please consider the area as a whole (i.e., both the County and City), unless otherwise noted. The pre-selected lists of options for this survey were generated given feedback from focus groups held with local stakeholders. These are the most mentioned responses. You have an option to add "other" responses below.



1. What do you see as the City/County's strengths? (Choose up to 5)

- |  |   |
|--|---|
| <input type="checkbox"/> Low cost of operations and low cost of living                           | <input type="checkbox"/> Topeka Public Library                                      |
| <input type="checkbox"/> Geographic location   | <input type="checkbox"/> Washburn University  |
| <input type="checkbox"/> Workforce availability and work ethic                                   | <input type="checkbox"/> Strong sense of community                                  |
| <input type="checkbox"/> Access to multiple higher education institutions                        | <input type="checkbox"/> Great place to raise a family                              |
| <input type="checkbox"/> Public schools  | <input type="checkbox"/> Downtown revitalization                                    |
| <input type="checkbox"/> Available economic development tools/funding (e.g., 1/2 cent sales tax) | <input type="checkbox"/> Washburn Technical College                                 |
| <input type="checkbox"/> Quality of place amenities (e.g., parks, theaters, trail system)        | <input type="checkbox"/> Increased collaboration between public and private sectors |
| <input type="checkbox"/> State capital   | <input type="checkbox"/> Health care  |
| <input type="checkbox"/> Thriving arts scene   | <input type="checkbox"/> Other  |

Comments:



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

- |  |  |
|--|--|
| <input type="checkbox"/> Lack of pride in the community/inferiority complex                  | <input type="checkbox"/> Too much bureaucracy                      |
| <input type="checkbox"/> High local property tax   | <input type="checkbox"/> Crime                                     |
| <input type="checkbox"/> Lack of critical thinking by leadership                             | <input type="checkbox"/> Unbalanced growth (west v. east)          |
| <input type="checkbox"/> Community isn't aesthetically pleasing                              | <input type="checkbox"/> Intolerance for failure                   |
| <input type="checkbox"/> Political structure seems to favor connections over merit           | <input type="checkbox"/> Weak K-12 education                       |
| <input type="checkbox"/> Internal streets/roadways are in need of repair                     | <input type="checkbox"/> Aging or poorly maintained infrastructure |
| <input type="checkbox"/> Non-growing population and tax-base                                 | <input type="checkbox"/> Too many empty buildings                  |
| <input type="checkbox"/> No community vision   | <input type="checkbox"/> Lack of amenities for young professionals |
| <input type="checkbox"/> Weak labor force  | <input type="checkbox"/> Few technology-based companies            |
| <input type="checkbox"/> Perception that local government is apathetic to the public's needs | <input type="checkbox"/> Few local corporate leaders               |
| <input type="checkbox"/> Local government lack of follow-through on initiatives              | <input type="checkbox"/> Other                                     |

Comments:



3. 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 Topeka/Shawnee County? (Choose up to 5 responses)

☐ Public transportation

☐ Utility infrastructure

☐ Broadband

☐ Downtown amenities

☐ Riverfront development

☐ Roadways and streets

☐ Gateways

☐ Wayfinding (signage)

☐ Basic infrastructure in the east

☐ Walkability

☐ Convention Center

☐ Commercial airline service

☐ Weak or missing code enforcement

☐ Truck stop

☐ Shared vision for growth

☐ Consolidated government

☐ Other

Comments:

4. On a scale of 1-5, with 5 being Very Strong, how would you rate the business climate of different jurisdictions (with business climate defined as those policies and laws enacted by the specific governing body that impact local businesses)?

- City of Topeka
- Shawnee County

Comments:



## Perceptions of JEDO and GO Topeka

This survey and the other Garner Economics work are undertaken on behalf of JEDO. One element of the work is to get a sense of the public perceptions of JEDO, its work, and the work of its primary economic development agent, GO Topeka. The following questions are being asked to gauge your perception of the two organizations and how economic development is conducted in the City and County.

5. What words or phrases describe JEDO? (Choose up to five responses)

- |   |  |
|---|--|
| <input type="checkbox"/> Secretive  | <input type="checkbox"/> Little understanding of who JEDO is   |
| <input type="checkbox"/> No out-of-the-box thinking                         | <input type="checkbox"/> Collaboration                         |
| <input type="checkbox"/> Focused on new growth                              | <input type="checkbox"/> Negative press                        |
| <input type="checkbox"/> Politically correct                                | <input type="checkbox"/> Serves the community                  |
| <input type="checkbox"/> Misunderstood                                      | <input type="checkbox"/> Inclusive                             |
| <input type="checkbox"/> Oriented toward larger companies rather than small | <input type="checkbox"/> Non-performing                        |
| <input type="checkbox"/> Progressive  | <input type="checkbox"/> Non-inclusive                         |
| <input type="checkbox"/> Corrupt  | <input type="checkbox"/> Lack of oversight by public officials |
| <input type="checkbox"/> Ineffective  | <input type="checkbox"/> Effective                             |
| <input type="checkbox"/> "Good old boy" network                             | <input type="checkbox"/> Non-transparent                       |
| <input type="checkbox"/> Supportive   | <input type="checkbox"/> Well-intentioned                      |
| <input type="checkbox"/> Controversial                                      | <input type="checkbox"/> Other                                 |
| <input type="checkbox"/> Unique   |  |

Comments:

6. What words or phrases describe GO Topeka, the primary agent for JEDO? (Choose up to five responses)

- |   |   |
|---|---|
| <input type="checkbox"/> Arrogant                 | <input type="checkbox"/> Visionary                                |
| <input type="checkbox"/> Non-transparent          | <input type="checkbox"/> Misunderstood                            |
| <input type="checkbox"/> Poor performing          | <input type="checkbox"/> Optimistic                               |
| <input type="checkbox"/> Unaccountable with funds | <input type="checkbox"/> Ambassadors                              |
| <input type="checkbox"/> Passionate               | <input type="checkbox"/> Visible externally                       |
| <input type="checkbox"/> Stepping out of the box  | <input type="checkbox"/> Service provider                         |
| <input type="checkbox"/> Great listeners          | <input type="checkbox"/> Chamber of Commerce                      |
| <input type="checkbox"/> Political                | <input type="checkbox"/> For-profit organization using tax money  |
| <input type="checkbox"/> Nimble                   | <input type="checkbox"/> Exclusive group                          |
| <input type="checkbox"/> Community-focused        | <input type="checkbox"/> Has had big wins and done effective work |
| <input type="checkbox"/> Not elected              | <input type="checkbox"/> Markets the community                    |
| <input type="checkbox"/> Progressive              | <input type="checkbox"/> Other                                    |

Comments:



7. What are your past experiences with, and current perceptions of, the various economic development groups involved in investment attraction and retention?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied	No Opinion
JEDO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GO Topeka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Topeka Chamber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit Topeka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

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

**Planning for Topeka and Shawnee County’s Future**

9. Are there programs in peer/competitor regions that you’ve seen elsewhere that JEDO should consider for this area? Please give examples.



10. Often, economic development change begins with setting priorities and creating a vision. Without worrying about money or politics, please indicate the top 5 items you would like to see the County and City leadership take on to strengthen its ability to attract and retain quality companies and talent to Topeka and Shawnee County. 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.

- |  |  |
|--|--|
| • Build lifestyle centers/entertainment districts  | • Improve public safety  |
| • Eliminate excess housing stock   | • Create more jobs   |
| • Consolidate government and schools   | • Encourage growth of small business                           |
| • Create a more business-minded approach to public governance                                    | • Create a more positive attitude about the area               |
| • Rethink zoning so it serves the City and County's goals  | • Recruit commercial air service                               |
| • Leverage being the capital city  | • Create a viable public transit system                        |
| • Economic development efforts for all of Shawnee County   | • Create a shared vision and plan                              |
| • Encourage growth and development in the east of the City                                       | • Consolidate government services                              |
| • Successfully redevelop downtown to fill vacant storefronts                                     | • Build community trust and pride                              |
| • Make Topeka/Shawnee County a place where workers want to live (reduce number of out-commuters) | • Provide more resources to small businesses and entrepreneurs |
|  | • Be less risk averse  |

11. Is there another initiative/priority you would suggest?

12. Are there any other issues that should be examined as we undertake our economic development situation analysis of JEDO?

## Appendix E

Please see the following tables for detailed information used for Figures and Tables throughout the report. Sources listed provide base data for Garner Economics to utilize for analysis.

### Source Figures

#	Subject	Source Data	Latest year	Next release scheduled
1	Net Population Change	US Census Bureau, Population Estimates	2014	May 2016 (To City level)
2	Annual Rate of Population Change	US Census Bureau, Population Estimates	2014	May 2016 (To City level)
3	Previous Locations of Residents	US Census Bureau, American Community Survey	2013	Sept 17, 2015
4	Median Age	US Census Bureau, American Community Survey	2013	Sept 17, 2015
5	Age & Gender Distribution	US Census Bureau, American Community Survey	2014	Sept 17, 2015
6	Age Groups (Compared to State and National)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
7	Age Groups (Benchmark Communities)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
8	Violent Crime Rates	FBI Uniform Crime Reports	2013	Fall 2015
9	Property Crime Rates	FBI Uniform Crime Reports	2013	Fall 2015
10	Educational Attainment (Compared to State and National)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
11	Educational Attainment (Benchmark Communities)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
12	Population In-Migration by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
13	Unemployment Rate	Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS)	2015	Monthly
14	Labor Force Change	Bureau of Labor Statistics, LAUS	2015	Monthly
15	Labor Force Participation Rates	US Census Bureau, American Community Survey	2013	Sept 17, 2015
16	Family Employment Status (Labor Force Participation)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
17	Employment Change	Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)	2014	Quarterly, Sept 2015 Annual Average June 2016
18	Self-Employed	US Census Bureau, American Community Survey	2013	Sept 17, 2015
19	Self-Employed	US Census Bureau, American Community Survey	2013	Sept 17, 2015
20	Startups	US Census Bureau, Business Dynamics Statistics	2012	Annual updates, data lags several years
21	Average Weekly Wage	Bureau of Labor Statistics, QCEW	2014	Quarterly, Sept 2015 Annual Average June 2016
22	Average Weekly Wage (10-year Trend)	Bureau of Labor Statistics, QCEW	2015	Quarterly, Sept 2015 Annual Average June 2016



23	Average Weekly Wage (10-year Change)	Bureau of Labor Statistics, QCEW	2016	Quarterly, Sept 2015 Annual Average June 2016
24	Household Income	US Census Bureau, American Community Survey	2013	Sept 17, 2015
25	Household Income	US Census Bureau, American Community Survey	2013	Sept 17, 2015
26	Per Capital Income	US Census Bureau, American Community Survey	2013	Sept 17, 2015
27	Poverty	US Census Bureau, American Community Survey	2013	Sept 17, 2015
28	Poverty	US Census Bureau, American Community Survey	2013	Sept 17, 2015
29	Poverty by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
30	Poverty by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
31	Median Earnings by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
32	Median Earnings by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
33	Cost of Living	C2ER, Cost-of-Living Index	2015	Sept 2015
34	Broadband	National Telecommunications and Information Administration	2014	Data as of June 30, 2014. Updated every 6 months.

### Source Tables

#	Subject	Source Data	Latest year	Next release scheduled
1	Net Population Change	US Census Bureau, Population Estimates	2014	May 2016 (To City level)
2	Annual Rate of Population Change	US Census Bureau, Population Estimates	2014	May 2016 (To City level)
3	Previous Locations of Residents	US Census Bureau, American Community Survey	2013	Sept 17, 2015
4	Race & Hispanic Origin	US Census Bureau, American Community Survey	2013	Sept 17, 2015
5	Age Groups	US Census Bureau, American Community Survey	2013	Sept 17, 2015
6	Crime	FBI Uniform Crime Reports	2013	Fall 2015
7	Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
8	Population In-Migration by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
9	Employment Status (Labor Force Participation)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
10	Family Employment Status (Labor Force Participation)	US Census Bureau, American Community Survey	2013	Sept 17, 2015
11	Employment Change	Bureau of Labor Statistics, QCEW	2014	Quarterly, Sept 2015 Annual Average June 2016





12	Self-Employment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
13	Startups	US Census Bureau, Business Dynamics Statistics	2012	Annual updates, data lags several years
14	Average Weekly Wage	Bureau of Labor Statistics, QCEW	2014	Quarterly, Sept 2015 Annual Average June 2016
15	Household Income	US Census Bureau, American Community Survey	2013	Sept 17, 2015
16	Per Capita Income	US Census Bureau, American Community Survey	2013	Sept 17, 2015
17	Poverty	US Census Bureau, American Community Survey	2013	Sept 17, 2015
18	Poverty by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
19	Median Earnings by Educational Attainment	US Census Bureau, American Community Survey	2013	Sept 17, 2015
20	Cost of Living	C2ER, Cost-of-Living Index	2015	Sept 2015
21	Broadband	National Telecommunications and Information Administration	2014	Data as of June 30, 2014. Updated every 6 months.