Douglas County Economic Indicators

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Agenda

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

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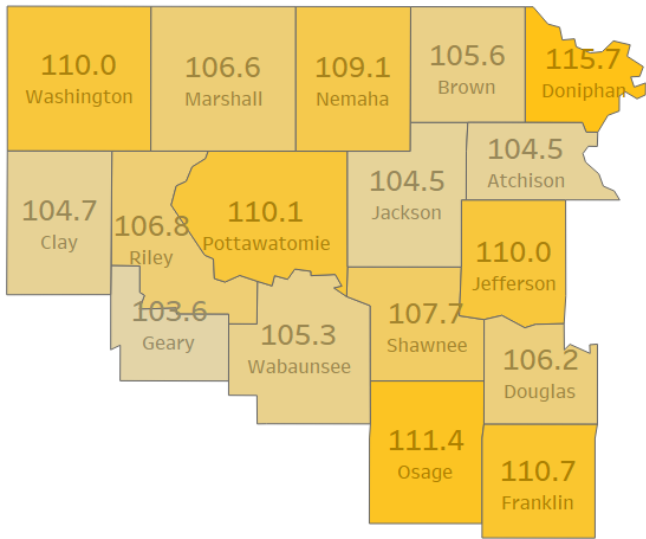
Business Dynamism Index
- Firm perspective
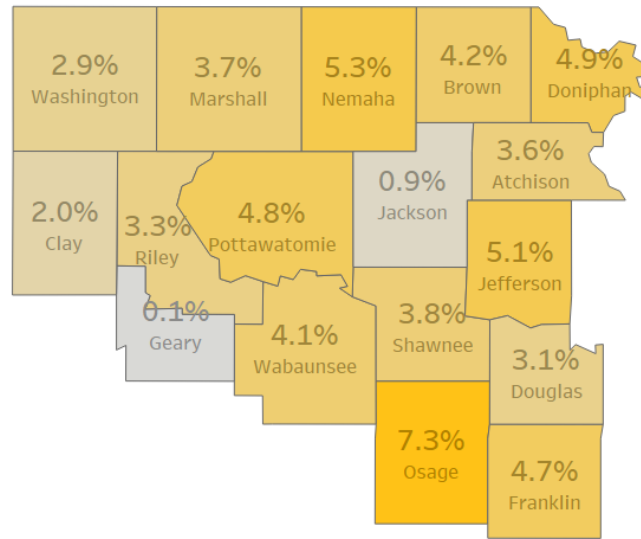- Examining the economic engine

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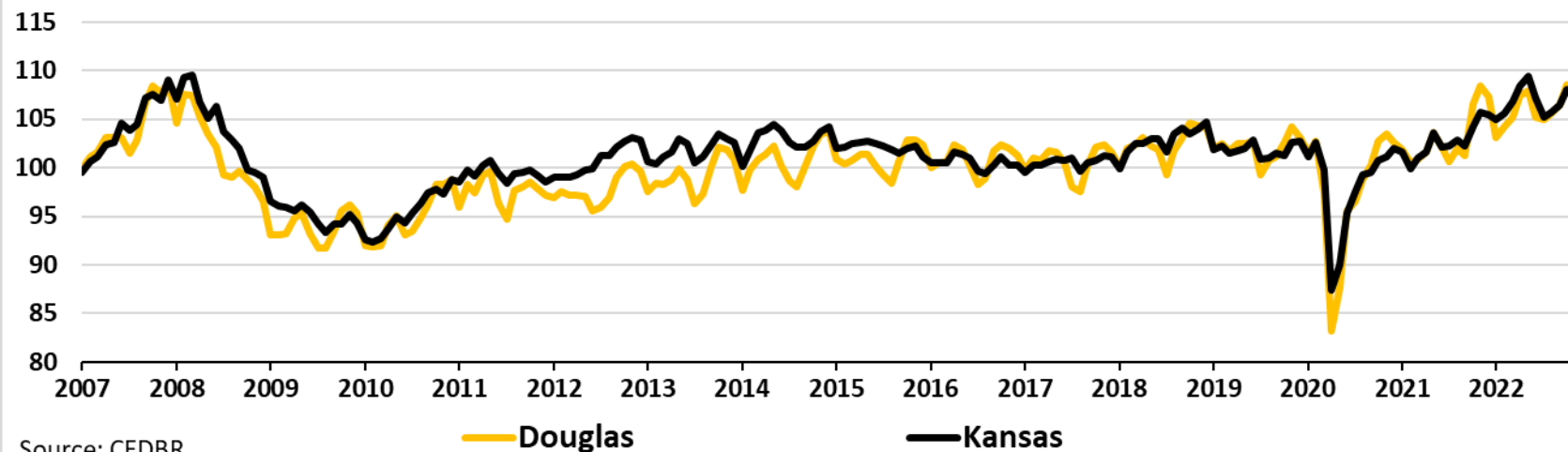- Market, core economic driver, and fiscal growth indicators

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Current Index

2022 Current Index

110.0 Washington	106.6 Marshall	109.1 Nemaha	105.6 Brown	115.7 Doniphan
104.7 Clay	106.8 Riley	110.1 Pottawatomie	104.5 Jackson	104.5 Atchison
103.6 Geary	105.3 Wabaunsee	107.7 Shawnee	110.0 Jefferson	106.2 Douglas
		111.4 Osage	110.7 Franklin	

Y/Y Current Index Growth – 2021-22

2.9% Washington	3.7% Marshall	5.3% Nemaha	4.2% Brown	4.9% Doniphan
2.0% Clay	3.3% Riley	4.8% Pottawatomie	0.9% Jackson	3.6% Atchison
0.1% Geary	4.1% Wabaunsee	3.8% Shawnee	5.1% Jefferson	3.1% Douglas
		7.3% Osage	4.7% Franklin	

Current Index

Chart showing Current Index from 2007 to 2022, comparing Douglas (yellow) and Kansas (black), y-axis from 80 to 115.

Source: CEDBR

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

- Douglas County falls slightly above the state average level post great recession

- Covid-19 pandemic hit Lawrence harder than average, but recovery was sharper.

- Slower mid-2010s than state average.

Healthy, Wealthy, and Wise – Kansas ranks near the national median

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

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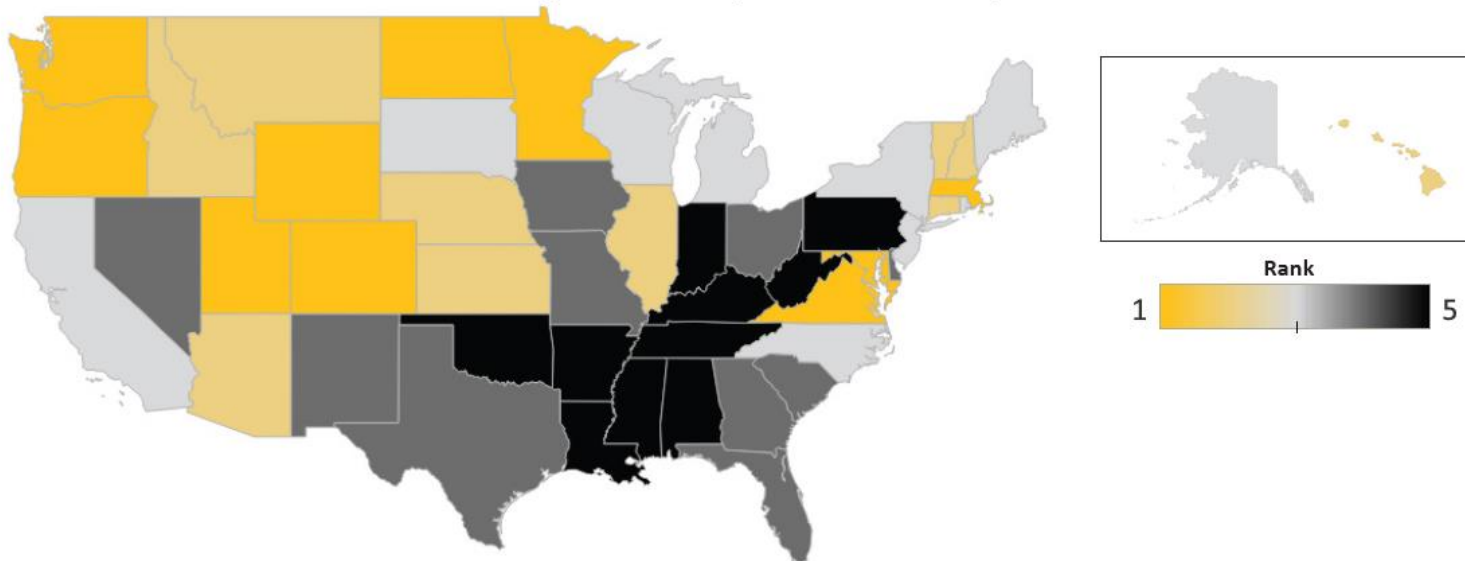
- **Healthy** – Near Median
  - **High obesity**
  - **Low birthweights**
- **Wealthy** – Near Median
  - **Low wealth polarization**
  - **Lagging incomes**
- **Wise** – Above Median
  - **Associate and Bachelor**

Kansas Healthy-Wealthy-Wise Index 2024

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

Neighboring State Ranks

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

Midwest Region

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

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Douglas County ranked among the top 20% in household conditions

Healthy-Wealthy-Wise 2024				
County	Healthy-Wealthy-Wise Index	Healthy	Wealthy	Wise
Atchison	5	4	4	5
Brown	5	4	4	4
Clay	4	4	2	3
Doniphan	3	3	2	3
Douglas	1	1	4	1
Franklin	4	5	1	4
Geary	1	2	3	1
Jackson	2	2	1	4
Jefferson	1	1	1	3
Marshall	2	2	3	3
Nemaha	2	1	2	4
Osage	4	5	1	5
Pottawatomie	1	1	1	1
Riley	2	1	5	1
Shawnee	3	3	3	2
Wabaunsee	1	2	1	3
Washington	5	5	2	5

- **Healthy:** Top 20%

- **Wealthy:** Below Median

- **Wise:** Top 20%

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Healthy – Labor market has comparatively low health risk

Low Birthweight Rate

	2018	2022	Growth
Kansas	7.0%	7.2%	0.2%
Douglas	6.5%	7.3%	0.8%

Obesity Rate

	2018	2022	Growth
Kansas	32.4%	35.8%	3.4%
Douglas	26.2%	32.0%	5.8%

Preventable Hospitalizations Rate

	2018	2022	Growth
Kansas	5.1%	2.7%	-2.4%
Douglas	3.3%	1.9%	-1.4%

Low Birthweight Rate map

- 7.3% Washington
- 6.3% Marshall
- 5.3% Nemaha
- 5.7% Brown
- 7.3% Doniphan
- 7.2% Clay
- 6.4% Riley
- 4.7% Pottawatomie
- 6.5% Jackson
- 6.8% Atchison
- 6.9% Geary
- 4.8% Wabaunsee
- 7.3% Shawnee
- 5.1% Jefferson
- 6.5% Osage
- 7.3% Douglas
- 7.6% Franklin

Obesity Rate map

- 40.1% Washington
- 35.3% Marshall
- 35.1% Nemaha
- 37.8% Brown
- 36.7% Doniphan
- 39.3% Clay
- 34.2% Riley
- 33.8% Pottawatomie
- 37.1% Jackson
- 36.2% Atchison
- 37.9% Geary
- 36.5% Wabaunsee
- 37.3% Shawnee
- 36.5% Jefferson
- 41.8% Osage
- 32.0% Douglas
- 40.6% Franklin

Preventable Hospitalizations Rate map

- 4.3% Washington
- 3.6% Marshall
- 2.7% Nemaha
- 5.0% Brown
- 3.6% Doniphan
- 3.5% Clay
- 1.7% Riley
- 2.4% Pottawatomie
- 2.7% Jackson
- 4.3% Atchison
- 2.5% Geary
- 3.0% Wabaunsee
- 3.3% Shawnee
- 2.4% Jefferson
- 3.4% Osage
- 1.9% Douglas
- 2.8% Franklin

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Wealthy – Wealth polarity and poverty improved strongly, but remain above average while household incomes grow more slowly
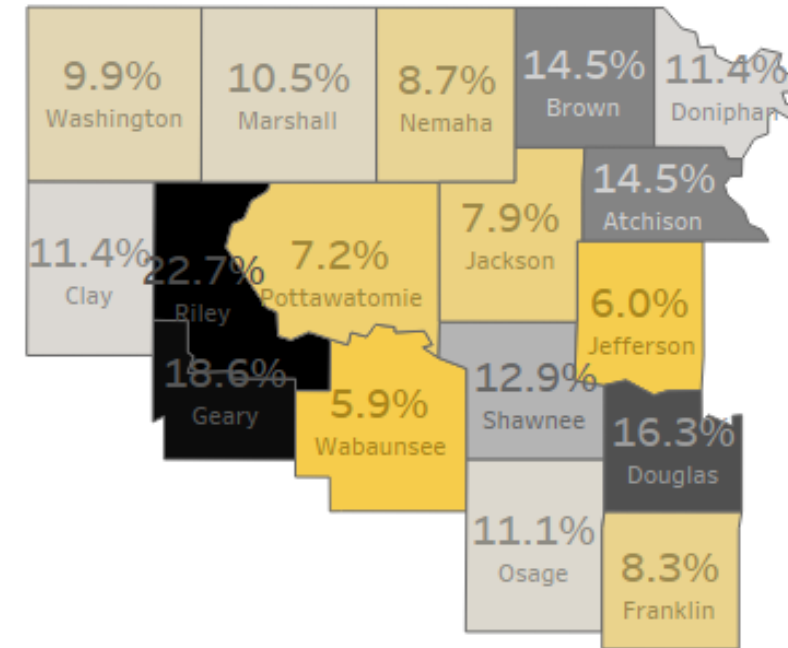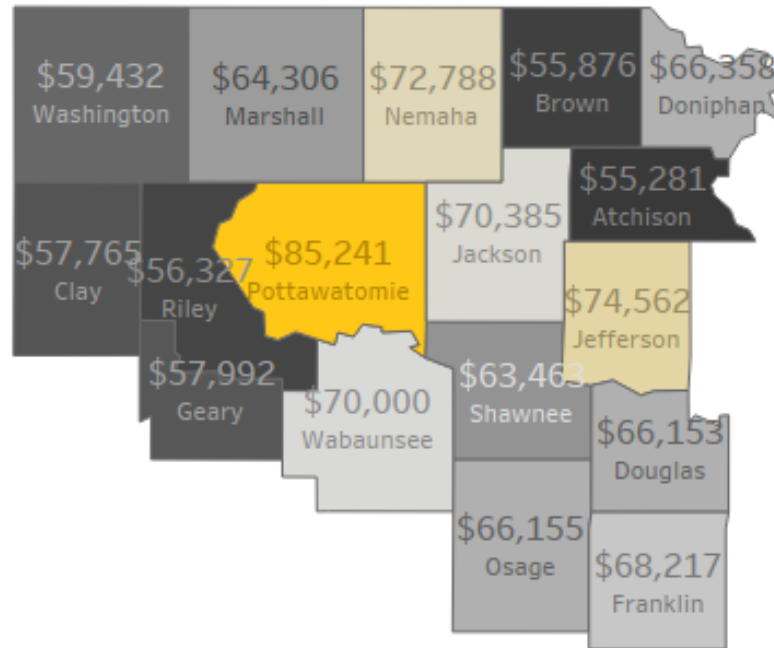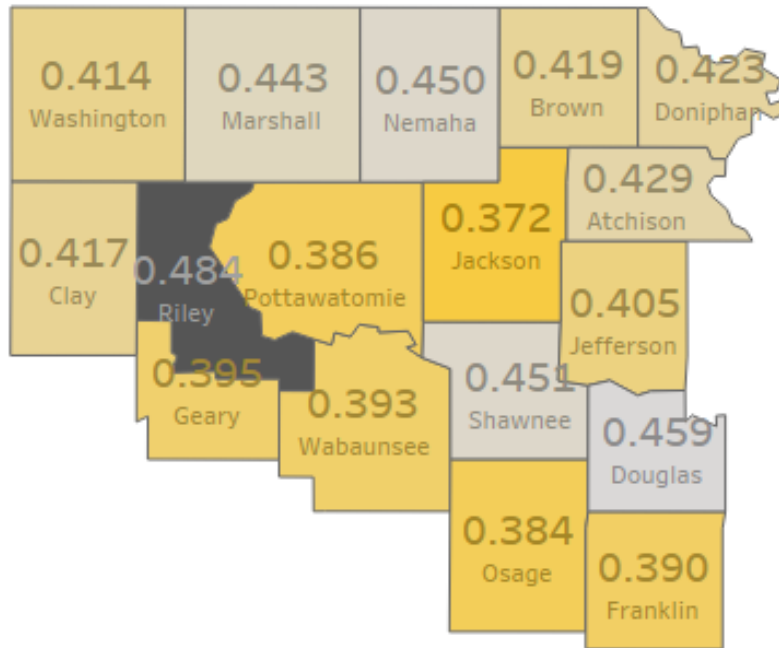
Gini Coefficient

	2018	2022	Growth
Kansas	0.458	0.458	-0.1%
Douglas	0.471	0.459	-2.6%

Median Household Income

	2018	2022	Growth
Kansas	$ 57,422	$ 69,747	21.5%
Douglas	$ 55,832	$ 66,153	18.5%

Poverty Rate

	2018	2022	Growth
Kansas	12.4%	11.6%	-0.8%
Douglas	18.7%	16.3%	-2.4%

Gini Coefficient map:
Washington 0.414, Marshall 0.443, Nemaha 0.450, Brown 0.419, Doniphan 0.423, Atchison 0.429, Clay 0.417, Riley 0.484, Pottawatomie 0.386, Jackson 0.372, Jefferson 0.405, Geary 0.395, Wabaunsee 0.393, Shawnee 0.451, Douglas 0.459, Osage 0.384, Franklin 0.390

Median Household Income map:
Washington $59,432, Marshall $64,306, Nemaha $72,788, Brown $55,876, Doniphan $66,358, Atchison $55,281, Clay $57,765, Riley $56,327, Pottawatomie $85,241, Jackson $70,385, Jefferson $74,562, Geary $57,992, Wabaunsee $70,000, Shawnee $63,46?, Douglas $66,153, Osage $66,155, Franklin $68,217

Poverty Rate map:
Washington 9.9%, Marshall 10.5%, Nemaha 8.7%, Brown 14.5%, Doniphan 11.4%, Atchison 14.5%, Clay 11.4%, Riley 22.7%, Pottawatomie 7.2%, Jackson 7.9%, Jefferson 6.0%, Geary 18.6%, Wabaunsee 5.9%, Shawnee 12.9%, Douglas 16.3%, Osage 11.1%, Franklin 8.3%

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Wise – Douglas County has the highest overall levels of Bachelor+ degrees

Total Education	2018	2022	Growth
Kansas	64.7%	66.1%	1.4%
Douglas	77.6%	76.8%	-0.8%

Some College and Associate Degrees

	2018	2022	Growth
Kansas	31.8%	31.4%	-0.4%
Douglas	27.2%	24.5%	-2.7%

Bachelor Degrees

	2018	2022	Growth
Kansas	20.8%	21.7%	0.9%
Douglas	26.1%	29.0%	2.9%

Advanced Degrees

	2018	2022	Growth
Kansas	12.1%	13.0%	0.9%
Douglas	24.3%	23.3%	-1.0%

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

U.S. Business Dynamism Index, 2024

Rank 1 — 5

- **Labor churn** – Below Median

- **Diversification** – Near Median

- **Growth** – Bottom 20% of States

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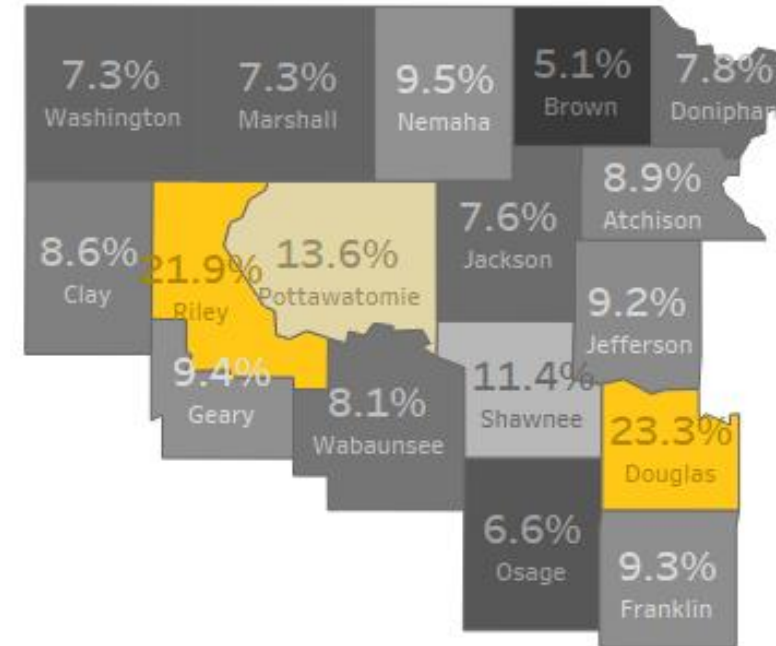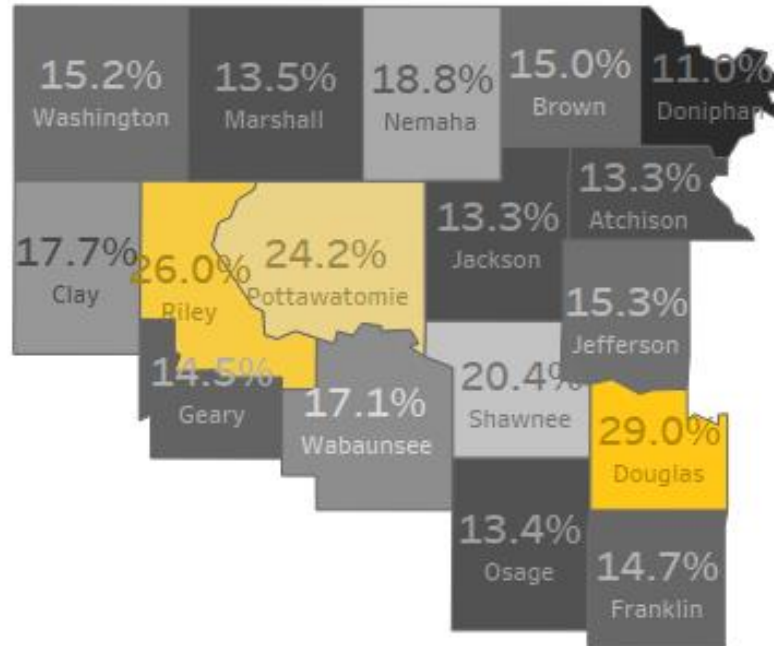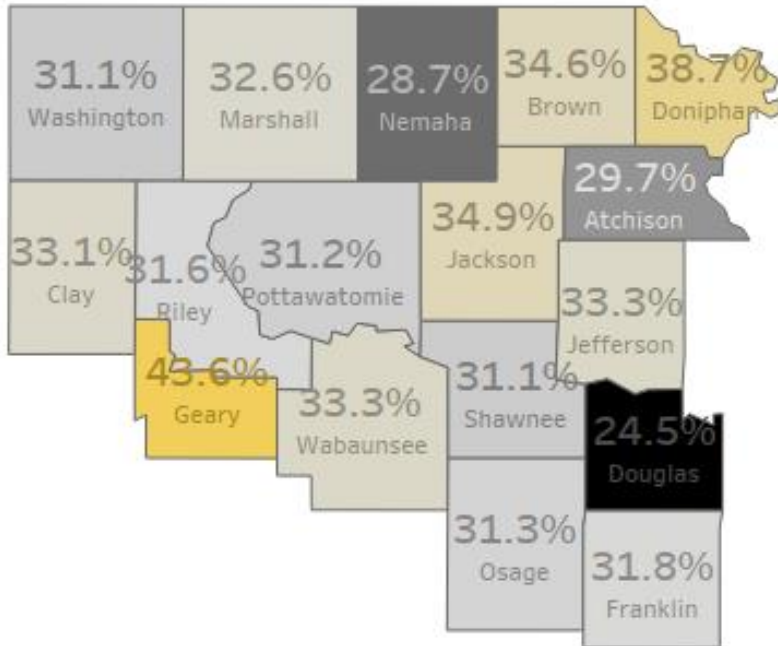
		Rank	Value
Labor Churn	New Hires	3	15.2%
	Separations	3	16.3%
Economic Diversification	Employment	3	97.4
	Establishments	4	89.7
	Wages	2	96.0
Economic Growth	Employment Growth	4	0.6%
	Establishments Growth	5	5.0%
	Wages Growth	4	21.2%

Neighbor State Dynamism Ranks

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

Midwest Region

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

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Douglas County ranks among the top 20% in Business Dynamism

Business Dynamism Index Ranks 2024				
County	Business Dynamism	Labor Churn	Economic Diversification	Economic Growth
Atchison	3	3	1	4
Brown	4	3	3	5
Clay	2	4	3	3
Doniphan	3	2	3	2
Douglas	1	1	1	1
Franklin	1	1	1	1
Geary	4	1	3	3
Jackson	4	5	4	5
Jefferson	3	1	3	1
Marshall	1	5	2	1
Nemaha	1	5	2	1
Osage	3	1	3	1
Pottawatomie	1	2	1	1
Riley	1	1	1	1
Shawnee	2	2	1	2
Wabaunsee	5	1	4	4
Washington	2	5	4	2

- **Labor Churn:** Top 20%

- **Economic Diversification:** Top 20%

- **Economic Growth:** Top 20%

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Labor Churn – Lower job movement may be a risk, but there are advantages in retention and growth has been better than average

New Hires	2018	2022	Growth
Kansas	14.3%	15.2%	0.9%
Douglas	13.1%	14.9%	1.9%

Separations	2018	2022	Growth
Kansas	15.7%	16.3%	0.6%
Douglas	15.1%	16.1%	1.0%

New Hires map:
- 9.4% Washington
- 8.7% Marshall
- 9.6% Nemaha
- 11.4% Brown
- 12.2% Doniphan
- 10.8% Clay
- 14.8% Riley
- 13.2% Pottawatomie
- 10.6% Jackson
- 12.0% Atchison
- 16.7% Geary
- 13.9% Wabaunsee
- 13.2% Shawnee
- 13.1% Jefferson
- 14.9% Douglas
- 13.0% Osage
- 14.8% Franklin

Separations map:
- 12.8% Washington
- 11.5% Marshall
- 10.9% Nemaha
- 14.0% Brown
- 14.3% Doniphan
- 12.7% Clay
- 16.0% Riley
- 15.0% Pottawatomie
- 11.7% Jackson
- 14.1% Atchison
- 18.5% Geary
- 15.1% Wabaunsee
- 14.4% Shawnee
- 16.4% Jefferson
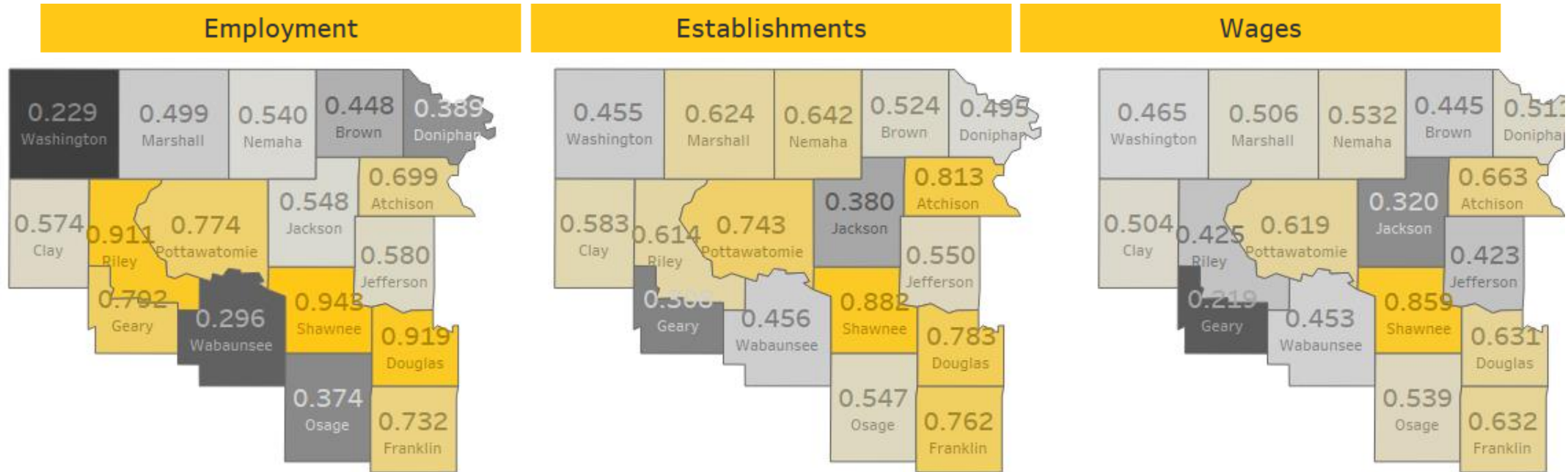- 16.1% Douglas
- 15.2% Osage
- 16.8% Franklin

- We are **not at the new labor market equilibrium**
- Separations are not an inherent negative

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

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Diversification – very high diversity with strong service-based economy

Employment	Establishments	Wages

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

Concentration		
Industry	**Employment**	**Wages**
Natural Resources and Mining	0.18	0.14
Construction	0.72	0.83
Manufacturing	1.16	1.29
Trade, Transportation, and Utilities	0.81	0.81
Information	0.60	0.41
Financial Activities	0.60	0.44
Professional and Business Services	0.68	0.65
Education and Health Services	0.73	0.72
Leisure and Hospitality	1.46	1.37
Other Services	1.53	1.98

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5-Year Expansion – faster establishment and wage growth despite slight employment decline
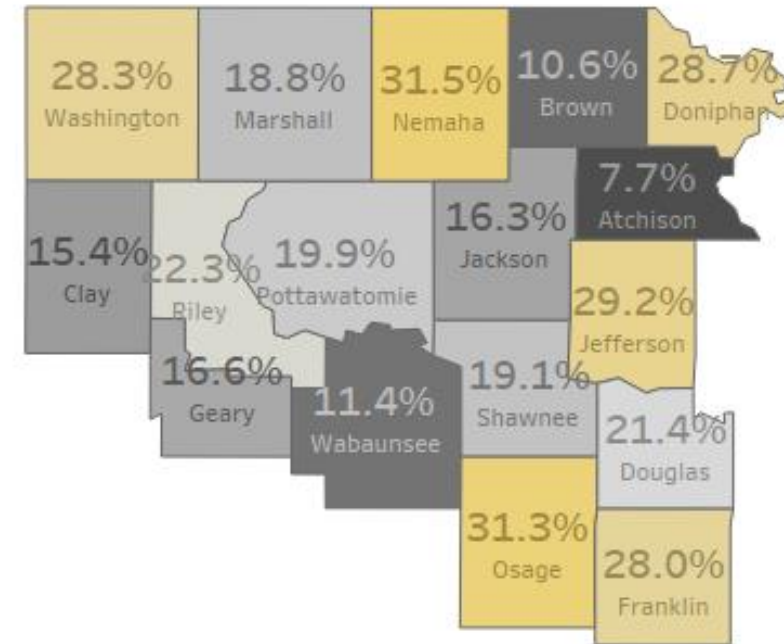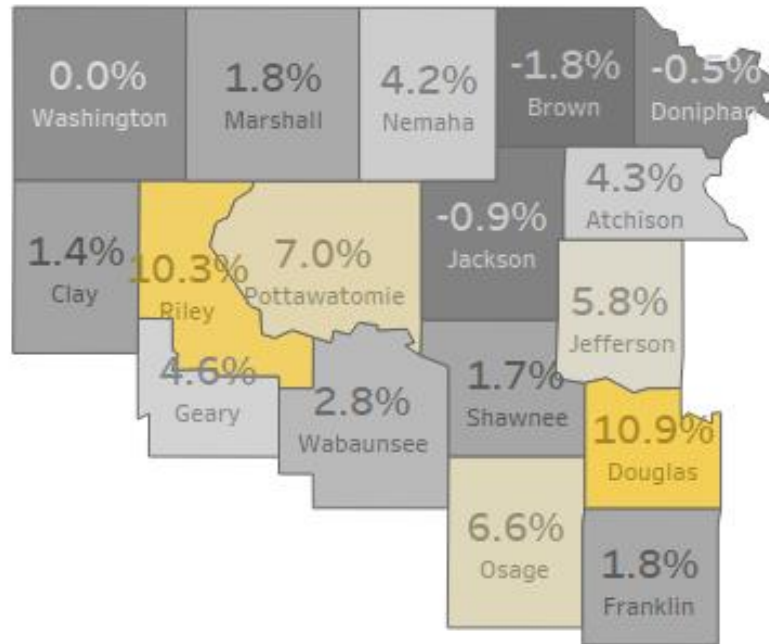
Employment		2018	2022	Growth
Kansas		1,383,119	1,390,817	0.6%
Douglas		49,203	48,388	-1.7%

Establishments		2018	2022	Growth
Kansas		88,793	93,245	5.0%
Douglas		3,064	3,397	10.9%

Wages ($millions)		2018	2022	Growth
Kansas		64,463	78,133	21.2%
Douglas		1,926	2,339	21.4%
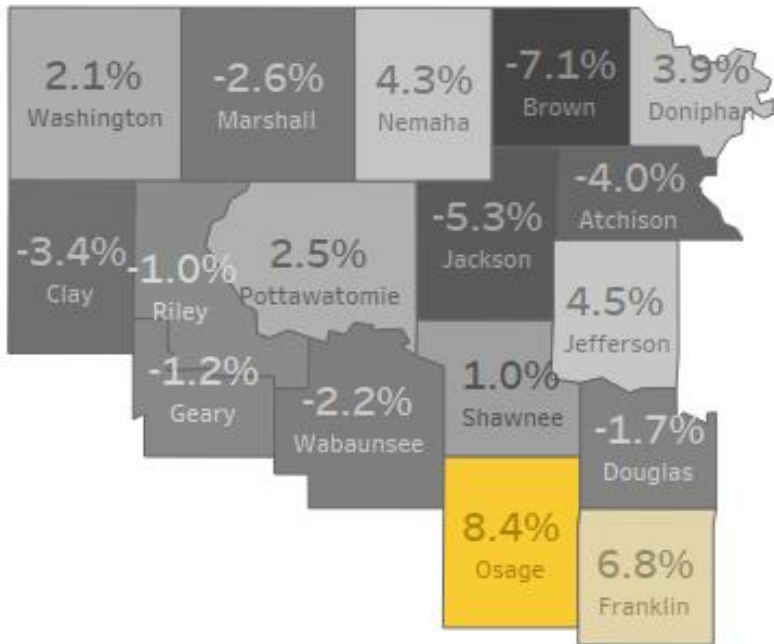
Douglas County ranks above the median in Government Vitality

Government Vitality Index 2024				
County	Government Vitality	Economic Drivers	Market Growth	Fiscal Growth
Atchison	5	4	5	5
Brown	3	3	3	3
Clay	3	2	4	3
Doniphan	5	5	5	2
Douglas	2	2	3	3
Franklin	1	2	3	2
Geary	5	5	5	5
Jackson	5	5	3	4
Jefferson	4	3	4	3
Marshall	3	5	2	2
Nemaha	1	1	2	1
Osage	2	3	3	2
Pottawatomie	4	4	3	3
Riley	4	4	4	2
Shawnee	4	4	3	4
Wabaunsee	1	1	3	1
Washington	1	2	4	1

- **Economic Drivers:** Above median

- **Market Growth:** Near Median

- **Fiscal Growth:** Near Median

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Economic Drivers – Above median overall

Median Home Value Growth

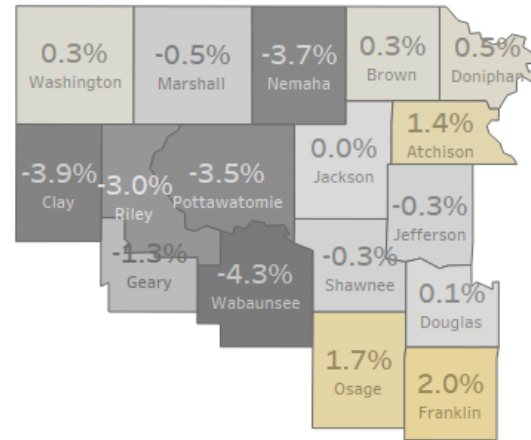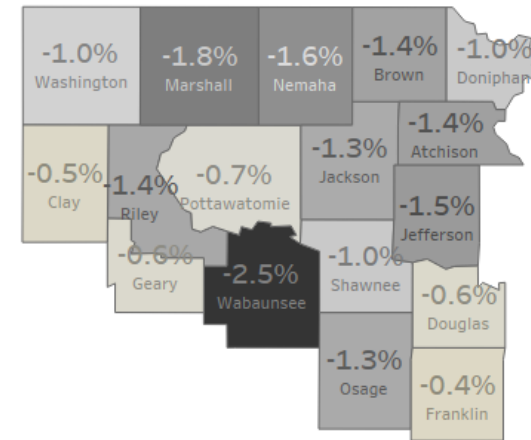| County	Value
Washington	48.9%
Marshall	19.3%
Nemaha	53.2%
Brown	32.8%
Doniphan	16.3%
Clay	43.8%
Riley	26.7%
Pottawatomie	26.8%
Jackson	16.7%
Atchison	23.2%
Geary	12.3%
Wabaunsee	55.2%
Jefferson	37.8%
Shawnee	23.7%
Douglas	37.9%
Osage	29.5%
Franklin	44.8%

Inward Mobility Growth

County	Value
Washington	0.3%
Marshall	-0.5%
Nemaha	-3.7%
Brown	0.3%
Doniphan	0.5%
Clay	-3.9%
Riley	-3.0%
Pottawatomie	-3.5%
Jackson	0.0%
Atchison	1.4%
Geary	-1.3%
Wabaunsee	-4.3%
Jefferson	-0.3%
Shawnee	-0.3%
Osage	1.7%
Douglas	0.1%
Franklin	2.0%

Prime Age Growth

County	Value
Washington	-1.0%
Marshall	-1.8%
Nemaha	-1.6%
Brown	-1.4%
Doniphan	-1.0%
Clay	-0.5%
Riley	-1.4%
Pottawatomie	-0.7%
Jackson	-1.3%
Atchison	-1.4%
Geary	-0.6%
Wabaunsee	-2.5%
Jefferson	-1.5%
Shawnee	-1.0%
Osage	-1.3%
Douglas	-0.6%
Franklin	-0.4%

Median Home Value

County	Value
Washington	$124,800
Marshall	$118,600
Nemaha	$186,800
Brown	$125,000
Doniphan	$128,900
Clay	$145,700
Riley	$247,000
Pottawatomie	$241,900
Jackson	$178,300
Atchison	$130,300
Geary	$173,700
Wabaunsee	$180,500
Jefferson	$192,300
Shawnee	$167,400
Douglas	$262,000
Osage	$146,000
Franklin	$188,400

Inward Mobility Share

County	Value
Washington	5.1%
Marshall	4.4%
Nemaha	3.4%
Brown	6.2%
Doniphan	9.4%
Clay	6.6%
Riley	13.6%
Pottawatomie	6.0%
Jackson	6.9%
Atchison	7.5%
Geary	19.2%
Wabaunsee	4.7%
Jefferson	5.4%
Shawnee	5.0%
Douglas	12.6%
Osage	7.3%
Franklin	7.6%

Prime Age Share

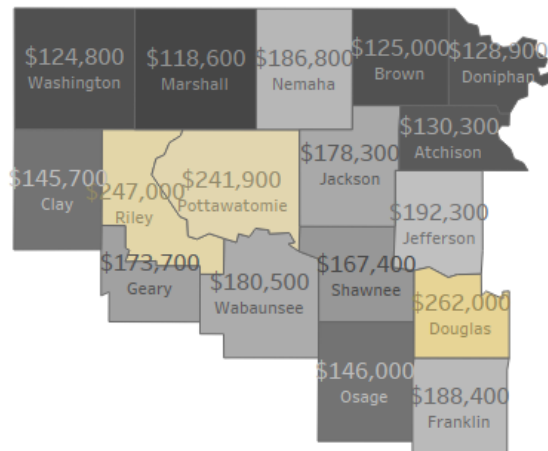| County	Value
Washington	31.1%
Marshall	31.7%
Nemaha	31.8%
Brown	32.2%
Doniphan	32.4%
Clay	32.9%
Riley	32.7%
Pottawatomie	37.1%
Jackson	33.9%
Atchison	31.0%
Geary	35.4%
Wabaunsee	32.0%
Jefferson	35.1%
Shawnee	35.9%
Douglas	35.7%
Osage	33.3%
Franklin	36.0%

- Median home values have grown on par with the statewide average and are high compared to other counties

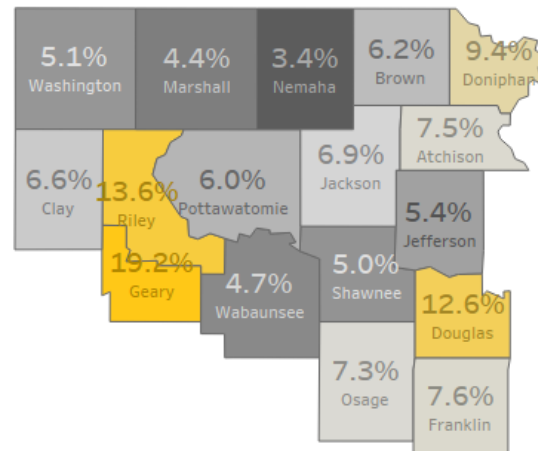- Inward mobility has grown, and is very high among counties statewide

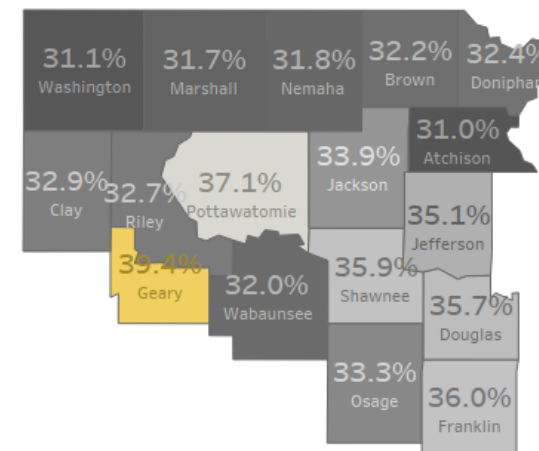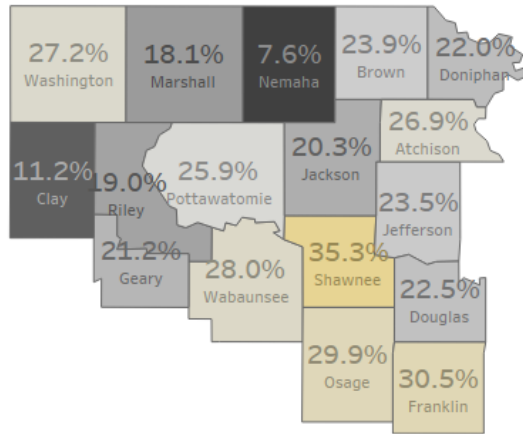- Prime age share declined, but remains on par with state average

Market Growth – Near median overall

Income Per Capita Growth

County	Value
Washington	27.2%
Marshall	18.1%
Nemaha	7.6%
Brown	23.9%
Doniphan	22.0%
Clay	11.2%
Riley	19.0%
Pottawatomie	25.9%
Jackson	20.3%
Atchison	26.9%
Geary	21.2%
Wabaunsee	28.0%
Shawnee	35.3%
Jefferson	23.5%
Douglas	22.5%
Osage	29.9%
Franklin	30.5%

GDP Growth

County	Value
Washington	19.5%
Marshall	39.9%
Nemaha	38.4%
Brown	33.5%
Doniphan	-2.2%
Clay	11.8%
Riley	23.5%
Pottawatomie	14.1%
Jackson	29.9%
Atchison	4.0%
Geary	13.8%
Wabaunsee	28.1%
Shawnee	25.4%
Jefferson	13.1%
Douglas	23.8%
Osage	17.9%
Franklin	19.9%

Current Index Growth

County	Value
Washington	9.4%
Marshall	8.6%
Nemaha	10.5%
Brown	5.3%
Doniphan	13.2%
Clay	4.6%
Riley	4.0%
Pottawatomie	10.6%
Jackson	4.6%
Atchison	5.3%
Geary	3.9%
Wabaunsee	5.1%
Shawnee	7.8%
Jefferson	9.7%
Douglas	5.4%
Osage	10.0%
Franklin	9.7%

Income Per Capita

County	Value
Washington	$53,062
Marshall	$45,002
Nemaha	$40,865
Brown	$49,749
Doniphan	$47,397
Clay	$58,13_
Riley	$48,40_
Pottawatomie	$60,487
Jackson	$62,195
Atchison	$47,195
Geary	$48,375
Wabaunsee	$53,707
Shawnee	$47,415
Jefferson	$49,154
Douglas	$47,117
Osage	$51,832
Franklin	$47,179

GDP ($millions)

County	Value
Washington	$241K
Marshall	$761K
Nemaha	$697K
Brown	$689K
Doniphan	$283K
Clay	$291K
Riley	$3,438K
Pottawatomie	$1,646K
Jackson	$480K
Atchison	$750K
Geary	$3,372K
Wabaunsee	$175K
Shawnee	$12,921K
Jefferson	$472K
Douglas	$6,176K
Osage	$339K
Franklin	$1,038K

Current Index

| County	Value
Washington	109.61
Marshall	108.38
Nemaha	108.98
Brown	105.58
Doniphan	115.14
Clay	104.65
Riley	106.51
Pottawatomie	110.09
Jackson	104.23
Atchison	104.50
Geary	103.53
Wabaunsee	104.98
Shawnee	107.63
Jefferson	109.93
Douglas	106.05
Osage	110.15
Franklin	110.66

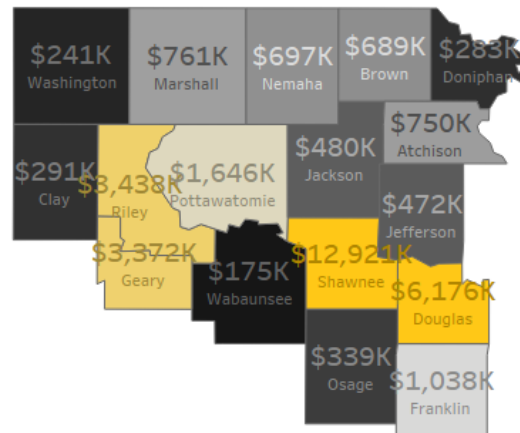- Income per capita growth slightly below statewide average, and the level is low for the region

- GDP has grown by slightly less than the state, but remains a regional powerhouse
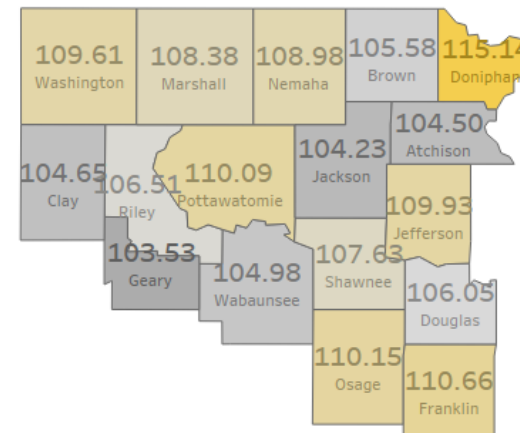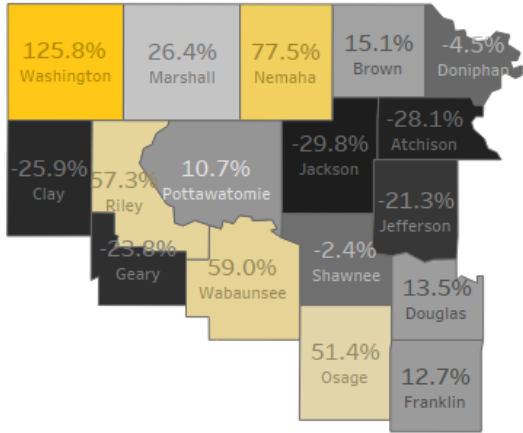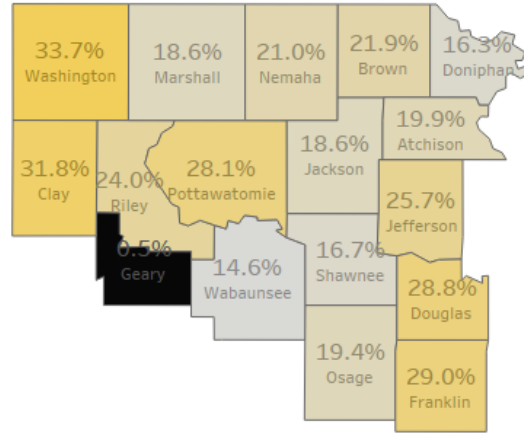
- Current Index almost exactly average
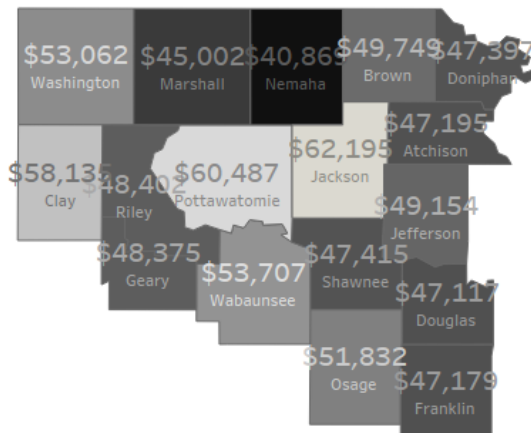
Fiscal Growth – Near median overall

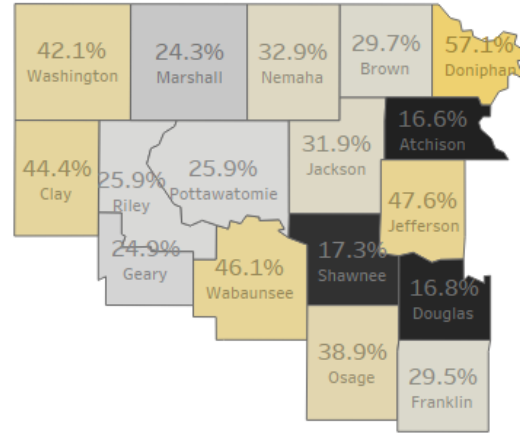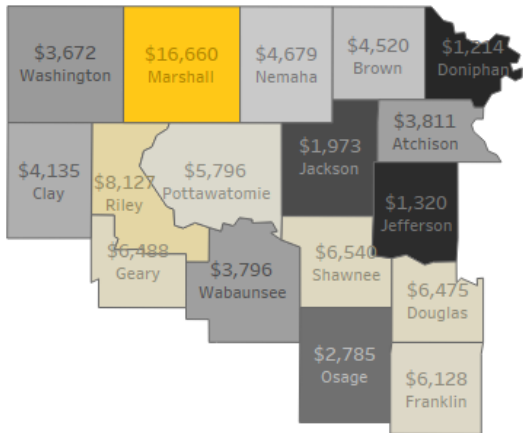Per Capita Bonds Growth / Per-Capita Property Tax Collections Growth / Per-Capita Retail Sales Growth / Per Capita Bonds / Per-Capita Property Tax Collections / Per-Capita Retail Sales
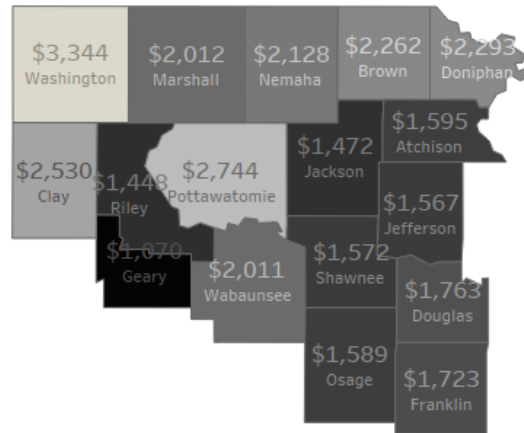
- Per capita bonds grew slower than the statewide average, but it remains high in level

- Per capita property tax collections have grown faster than the state average but remain low on a per-capita basis

- Per capita retail sales growth is below average, though is slightly above average in level