

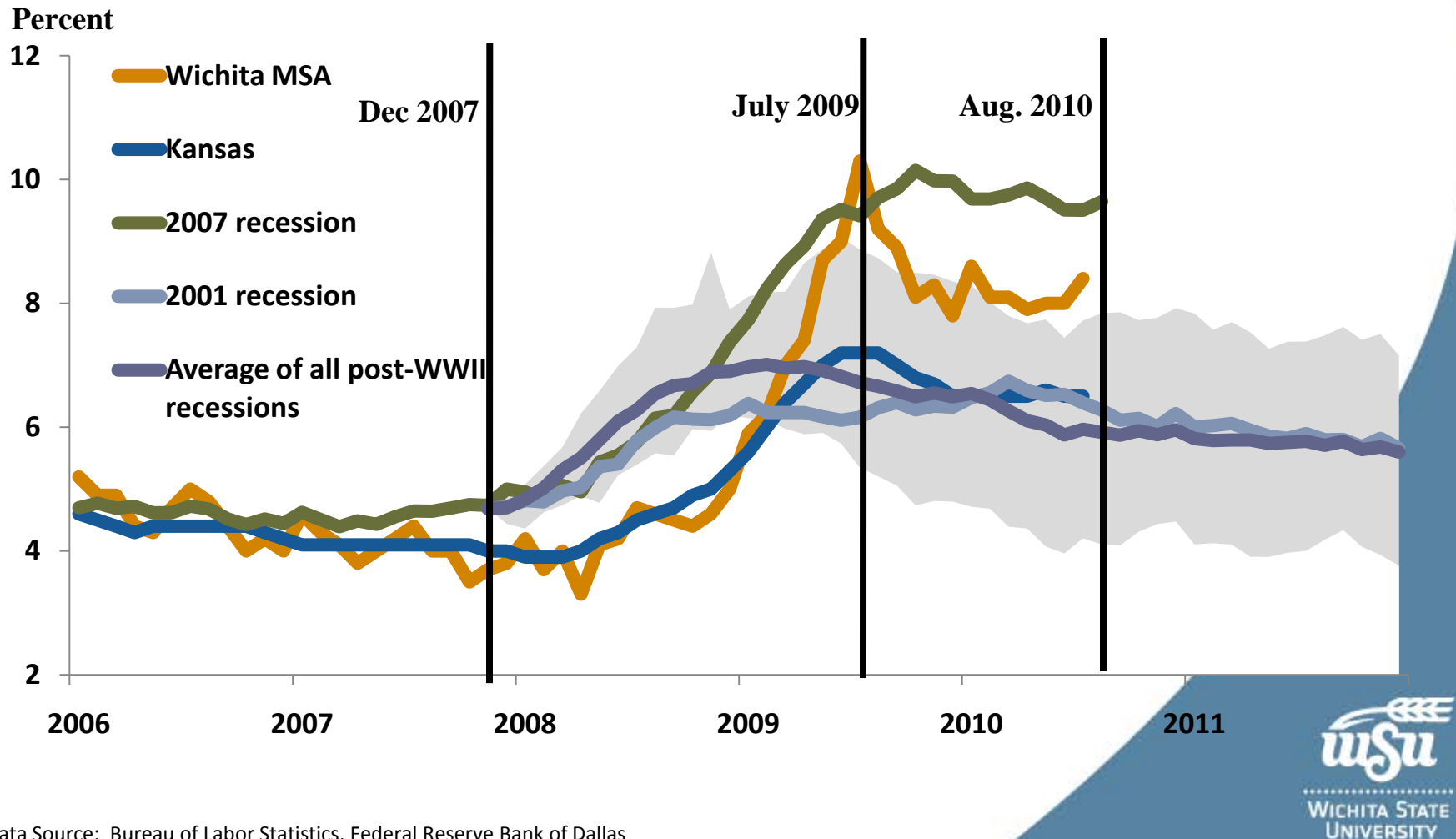
Wichita 2010 Review 2011 Forecast

Jeremy Hill, director
Center for Economic Development and Business Research
W. Frank Barton School of Business
Wichita State University
October 2010

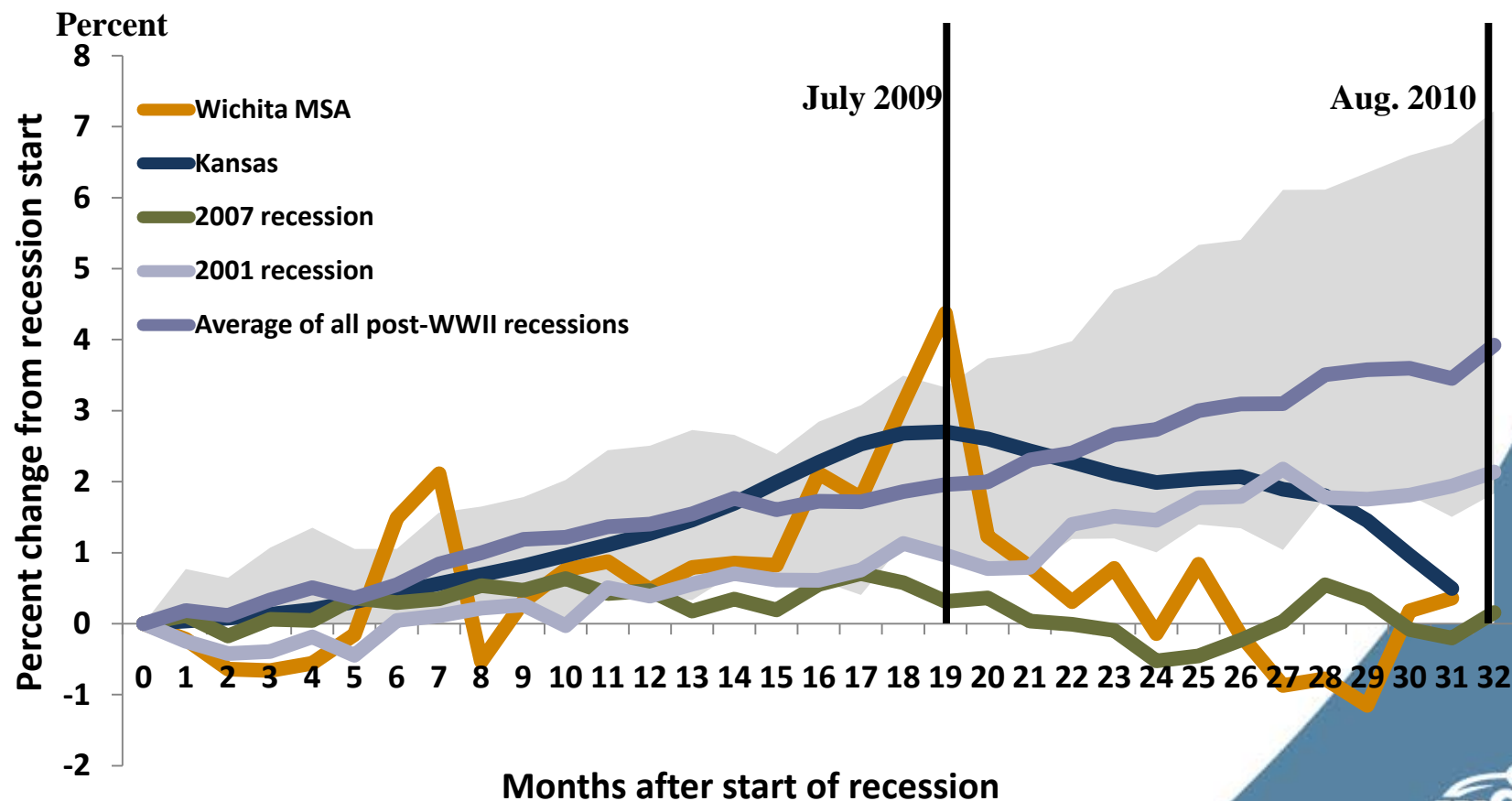
Overview

- **The Great Recession**
 - What does it really look like in terms of jobs?
- **Labor Mobility**
 - A telling story of what might be around the corner.
- **Business Environment**
 - What is slowing us down, and are there resources for future growth?
- **Commercial Loan Market**
 - Can cash and opportunity meet in the middle?
- **Economic Employment Outlook**
 - What to expect in 2011

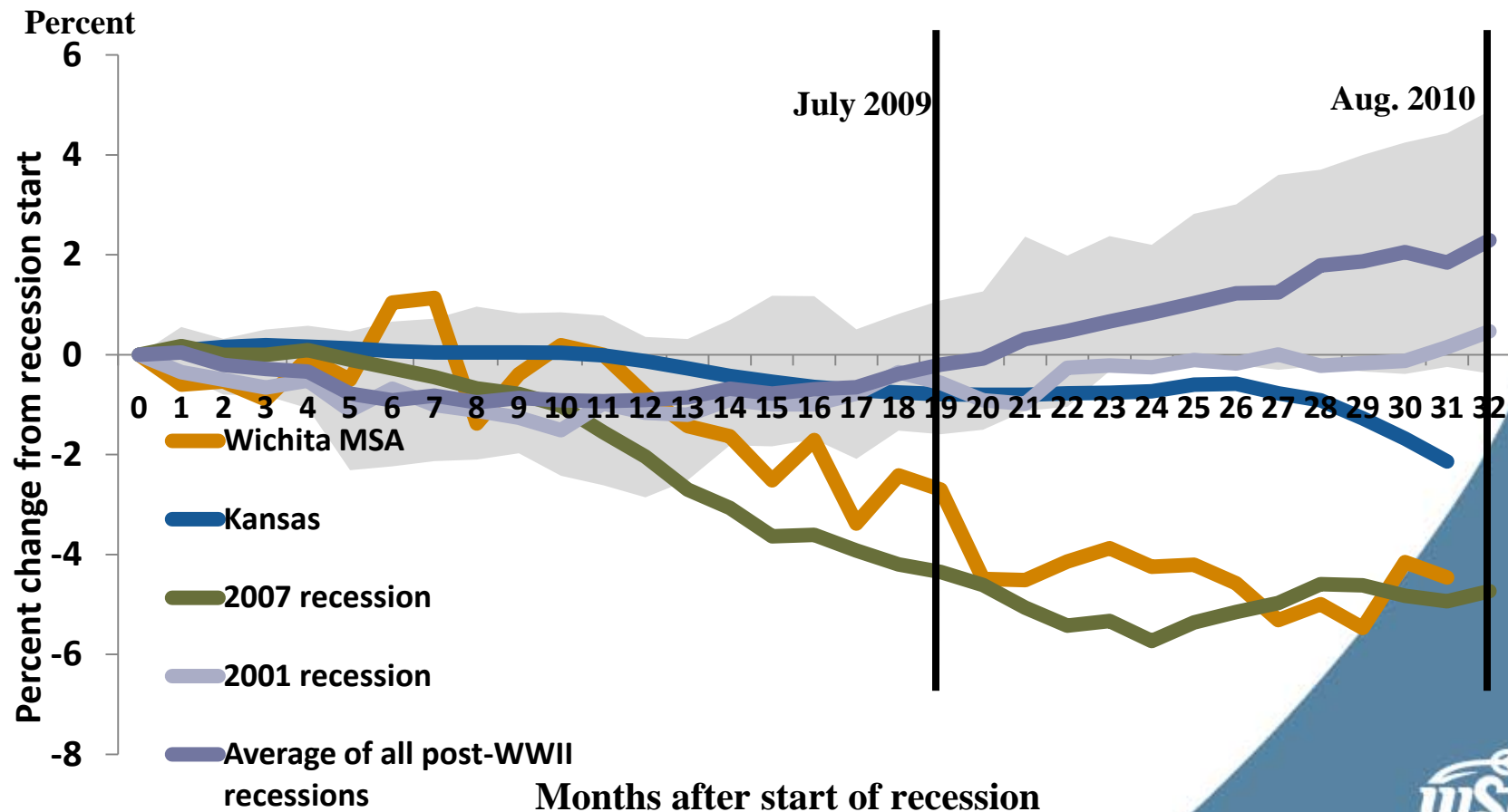
Unemployment Rates Compared to Past U.S. Recessions



Labor Force Growth

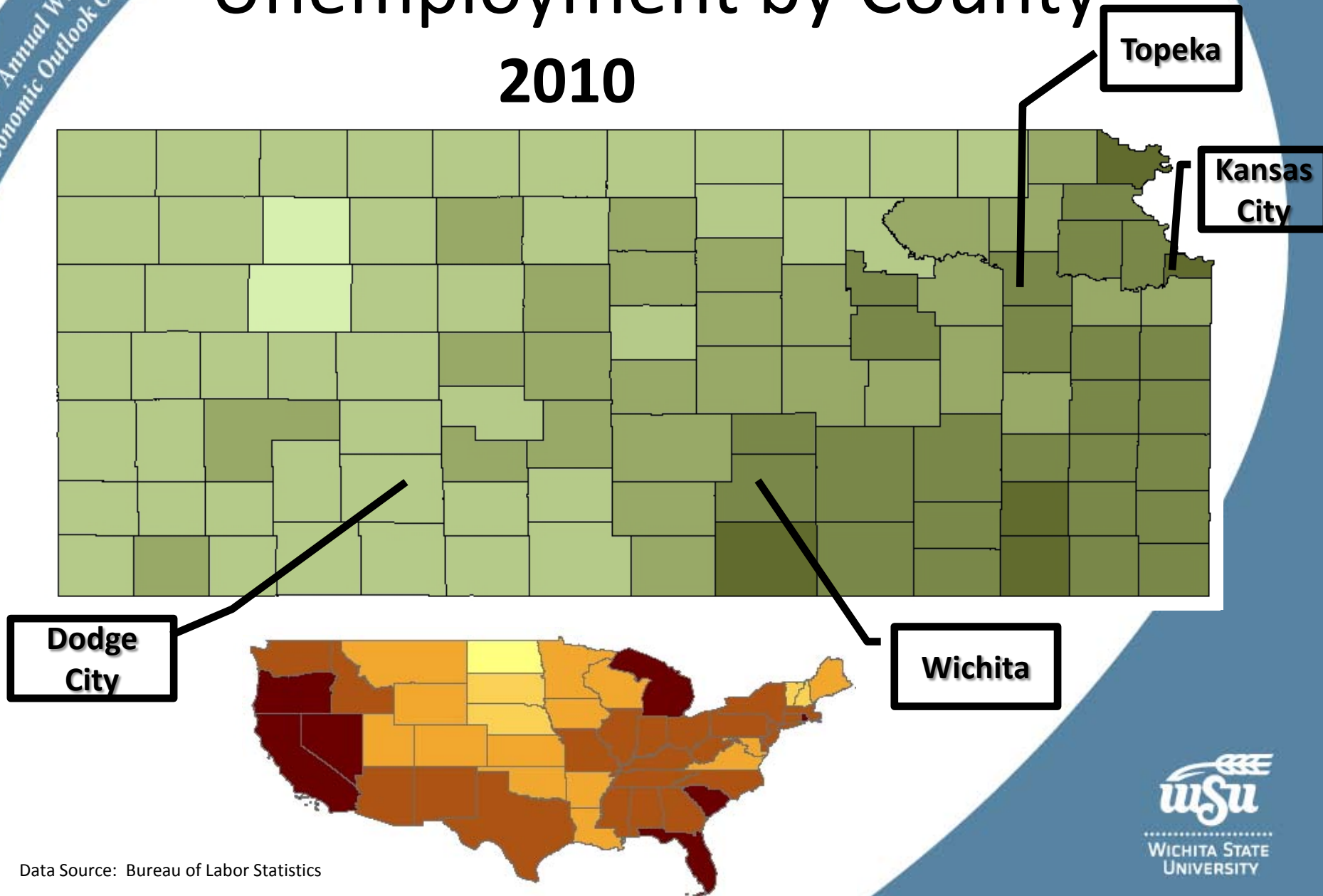


Civilian Employment



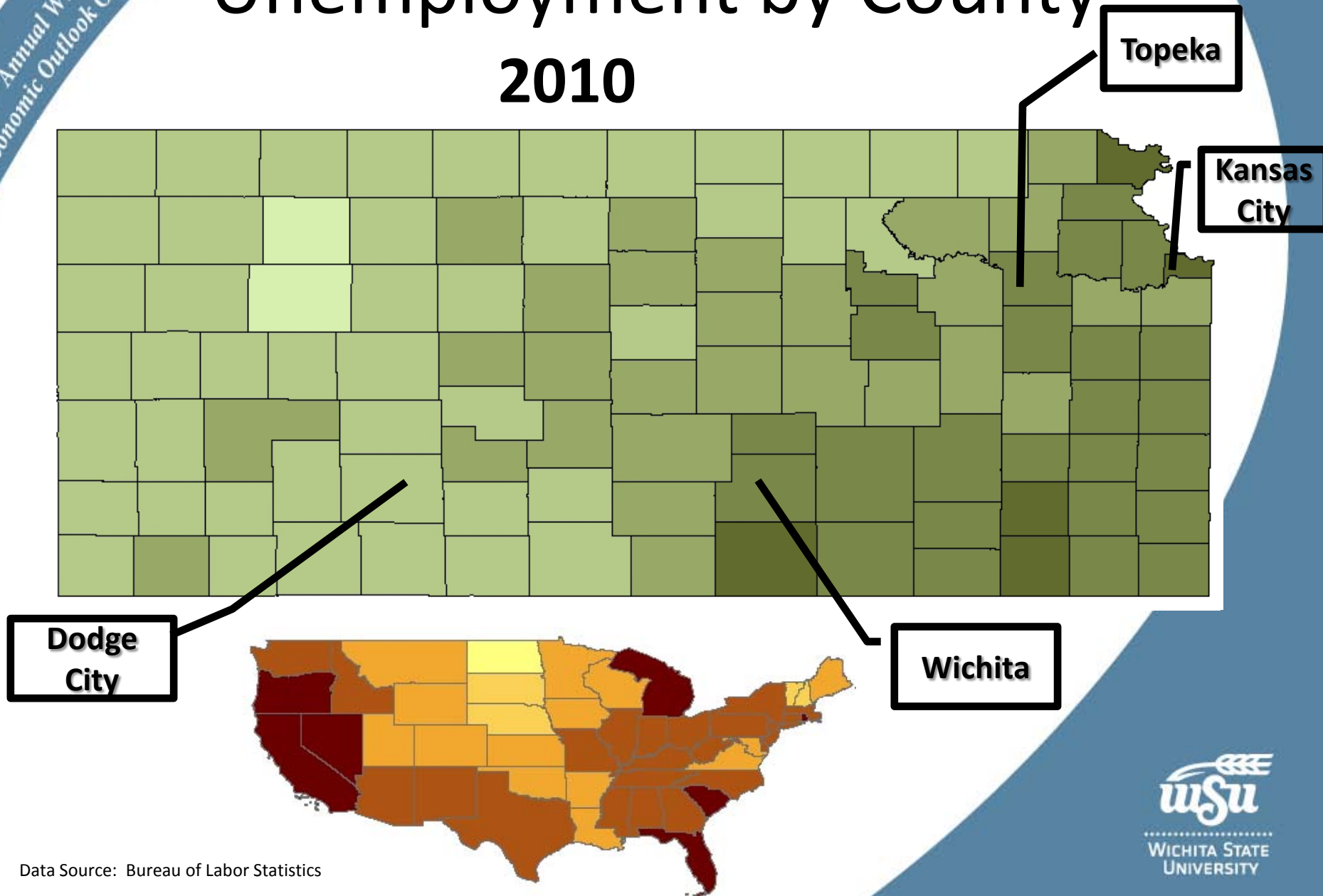
Unemployment by County

Unemployment by County 2010



Data Source: Bureau of Labor Statistics

Unemployment by County 2010

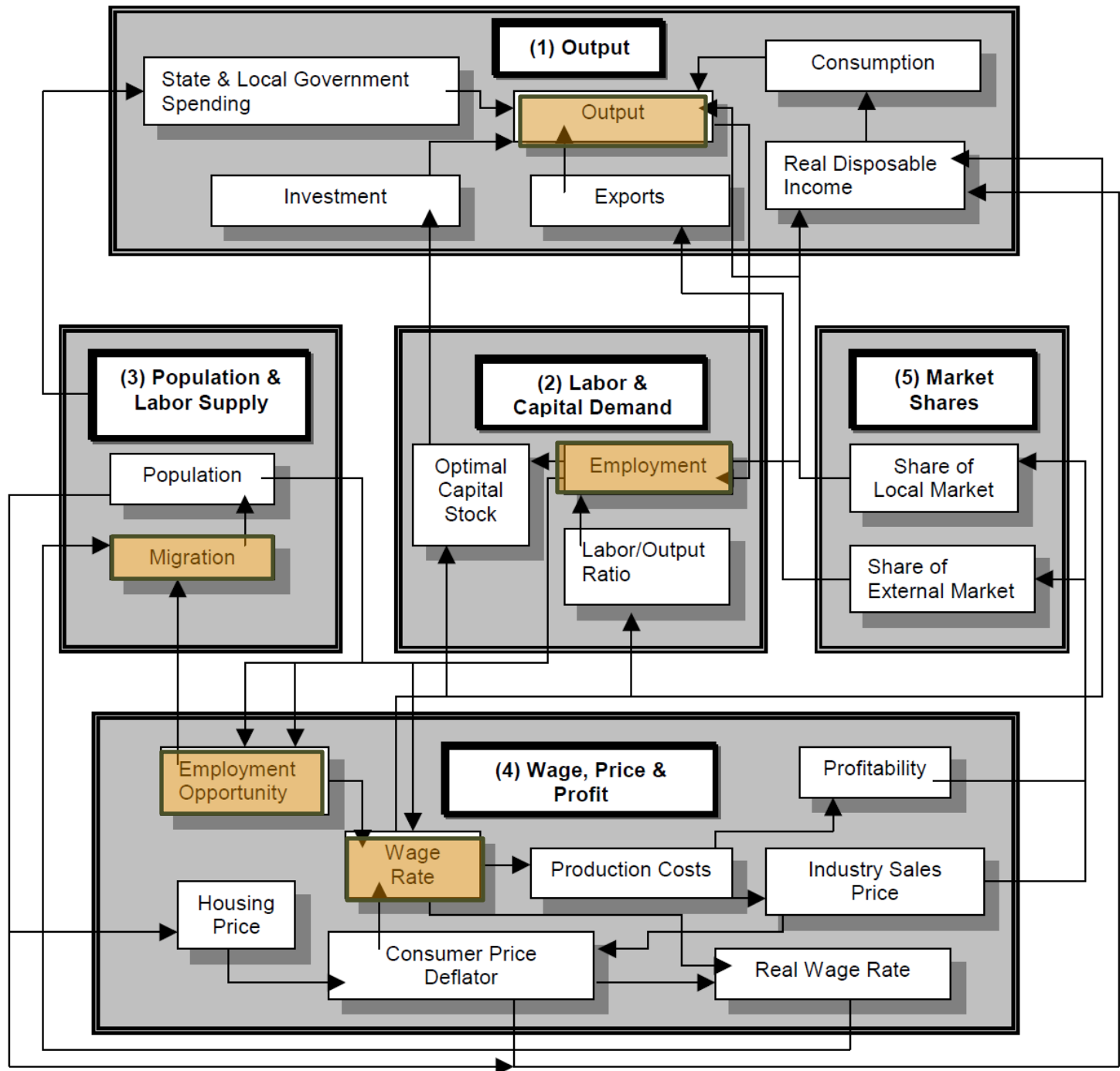


Data Source: Bureau of Labor Statistics

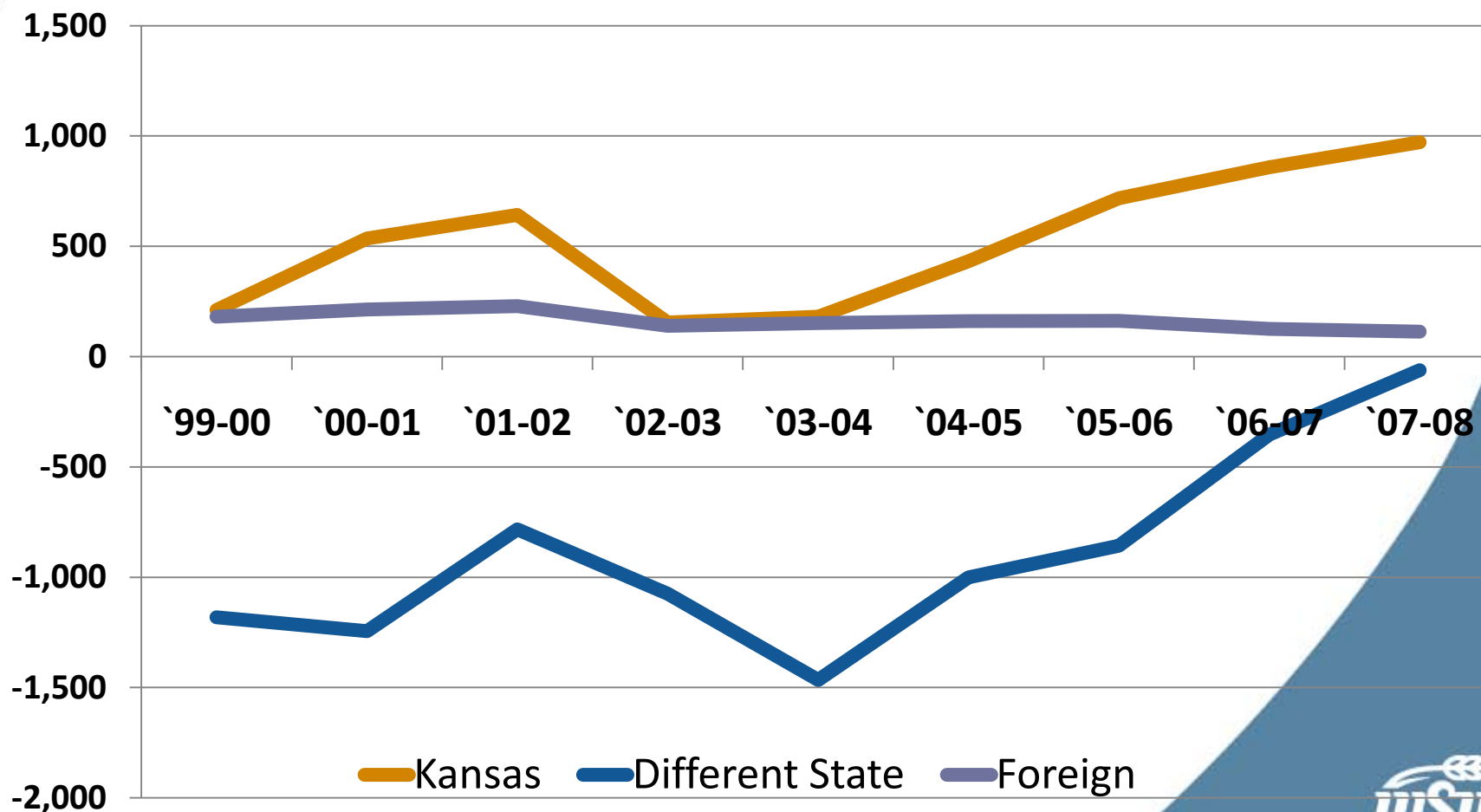
Labor Mobility

**A telling story of what might
be around the corner.**

Labor Mobility

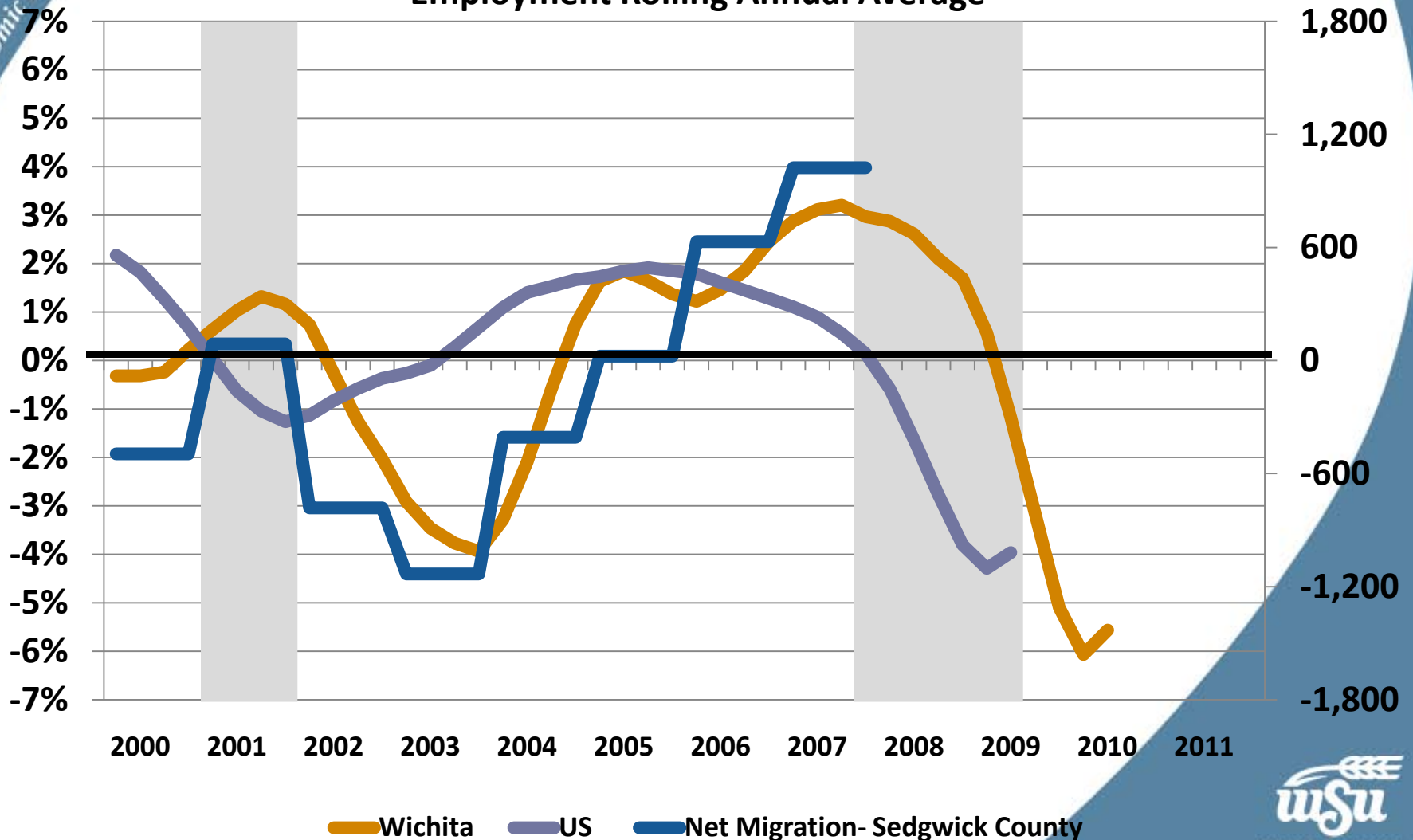


Net Migration to Sedgwick County



Wichita – Net Migration

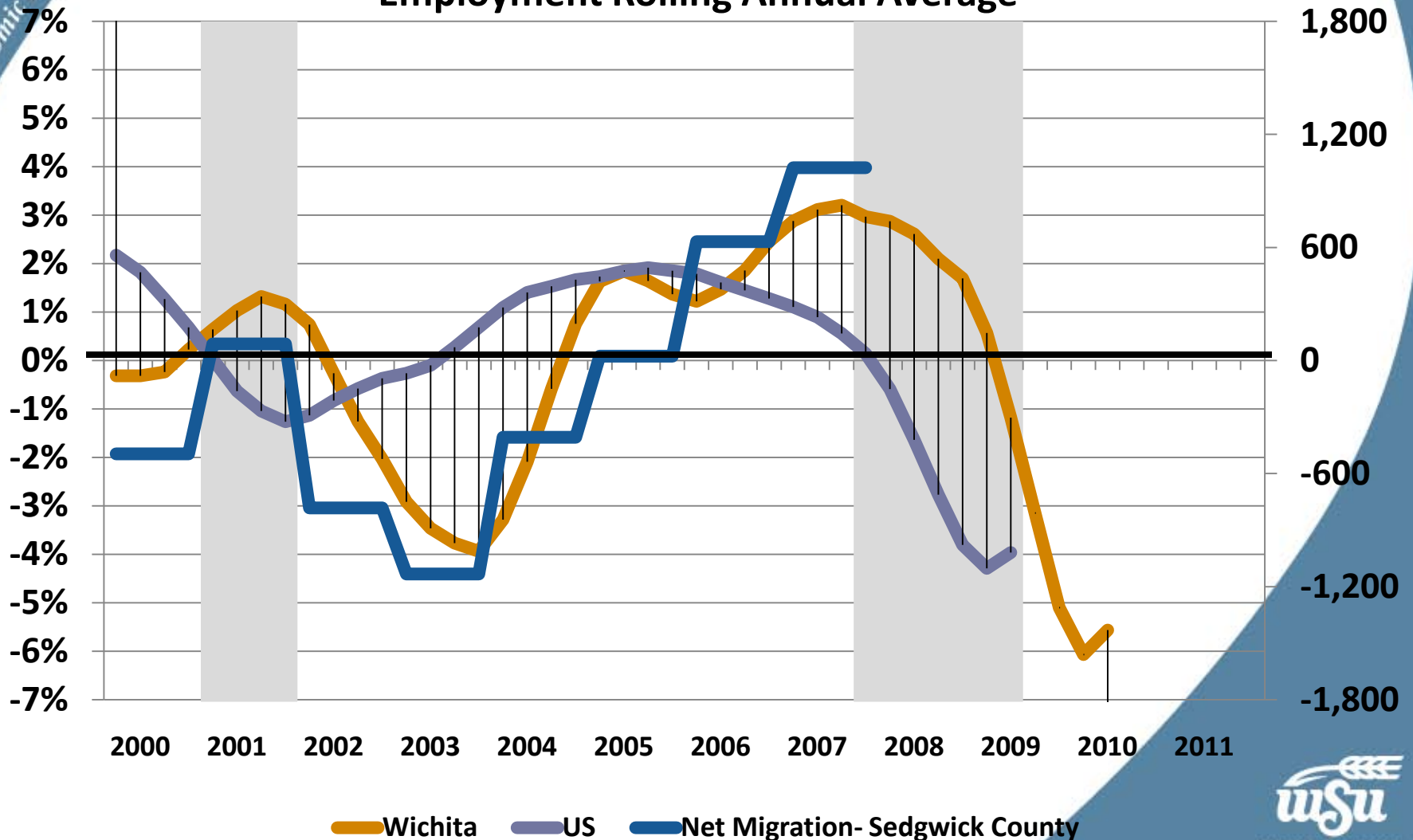
Employment Rolling Annual Average



Data Source: Bureau of Labor Statistics, Internal Revenue Service

Wichita -Net Migration

Employment Rolling Annual Average



Business Environment

What is slowing us down, and are there resources for future growth?

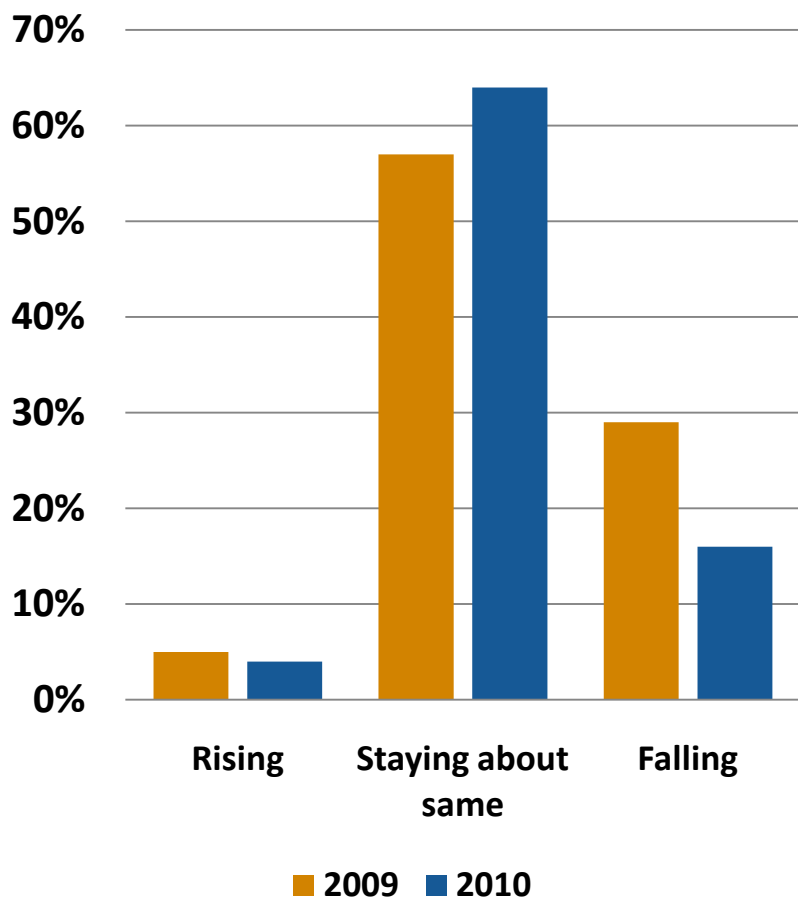
Small Businesses

- **Importance** (Less than 500 Employees)
 - Employ half of all private sector jobs
 - Generated 65 percent of net new jobs over the past 17 years
 - Produce 13 times more patents per employee than larger patenting firms
- **Entrepreneurial activity**
 - Job turnover
 - Kauffman Index
 - Sectors (Construction, Manufacturing, and Other)
 - Kansas
- **Regulations** (Less than 20 Employees)
 - Over time
 - Environmental
 - Manufacturing

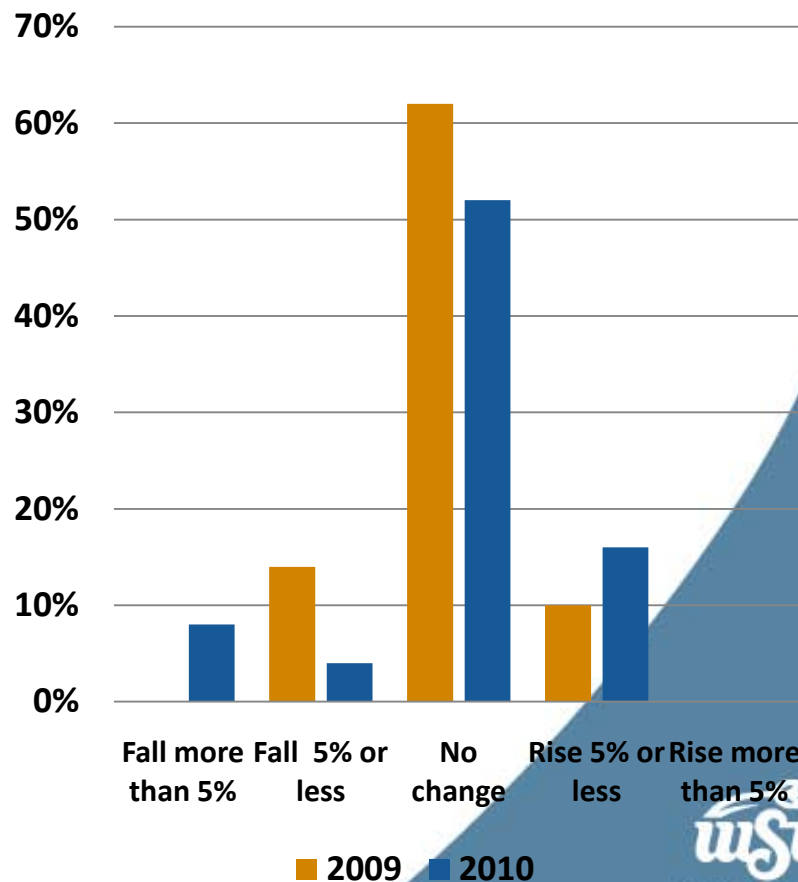
Prices Charged

Wichita Business Survey

Past Three Months



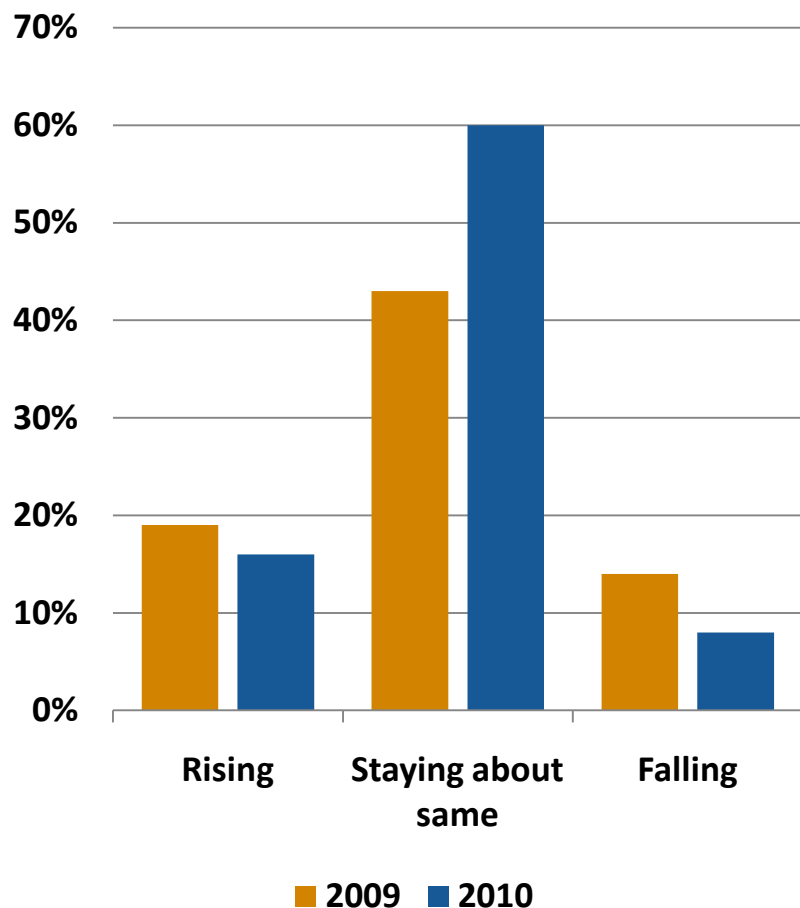
Next Three Months



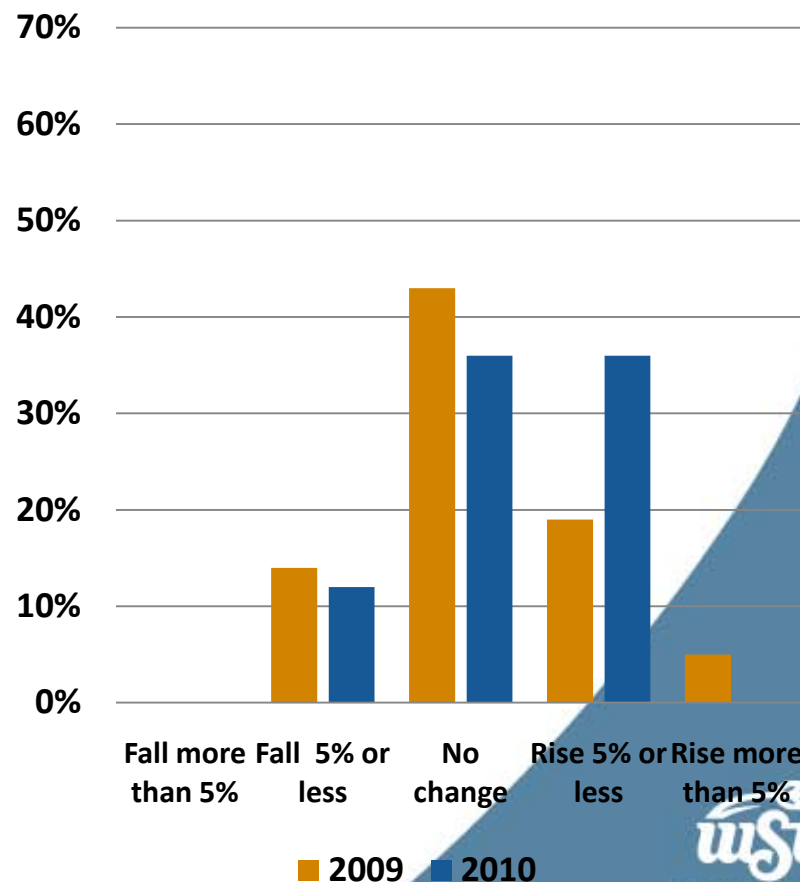
Costs: Prices of Input Materials

Wichita Business Survey

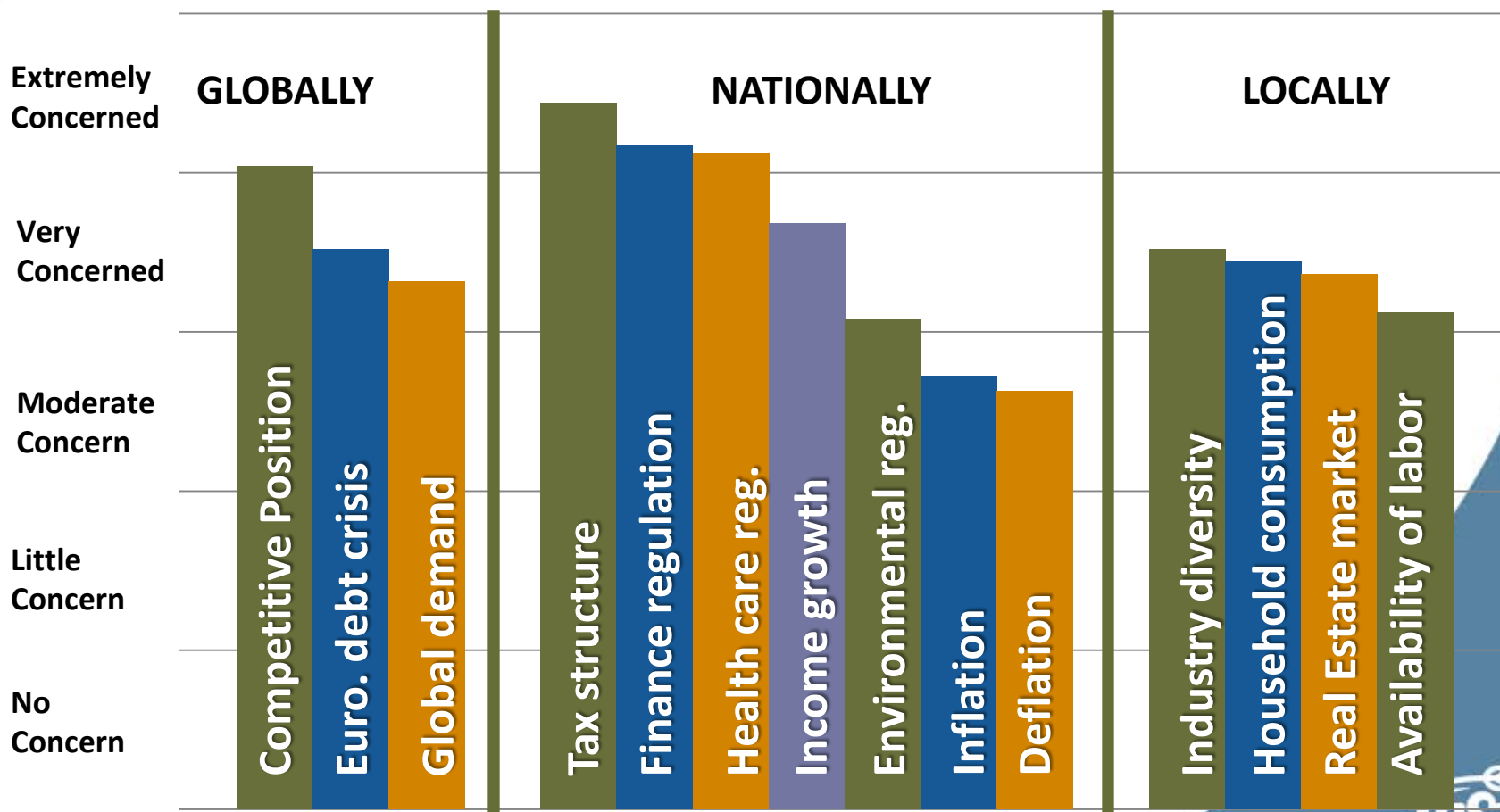
Past Three Months



Next Three Months



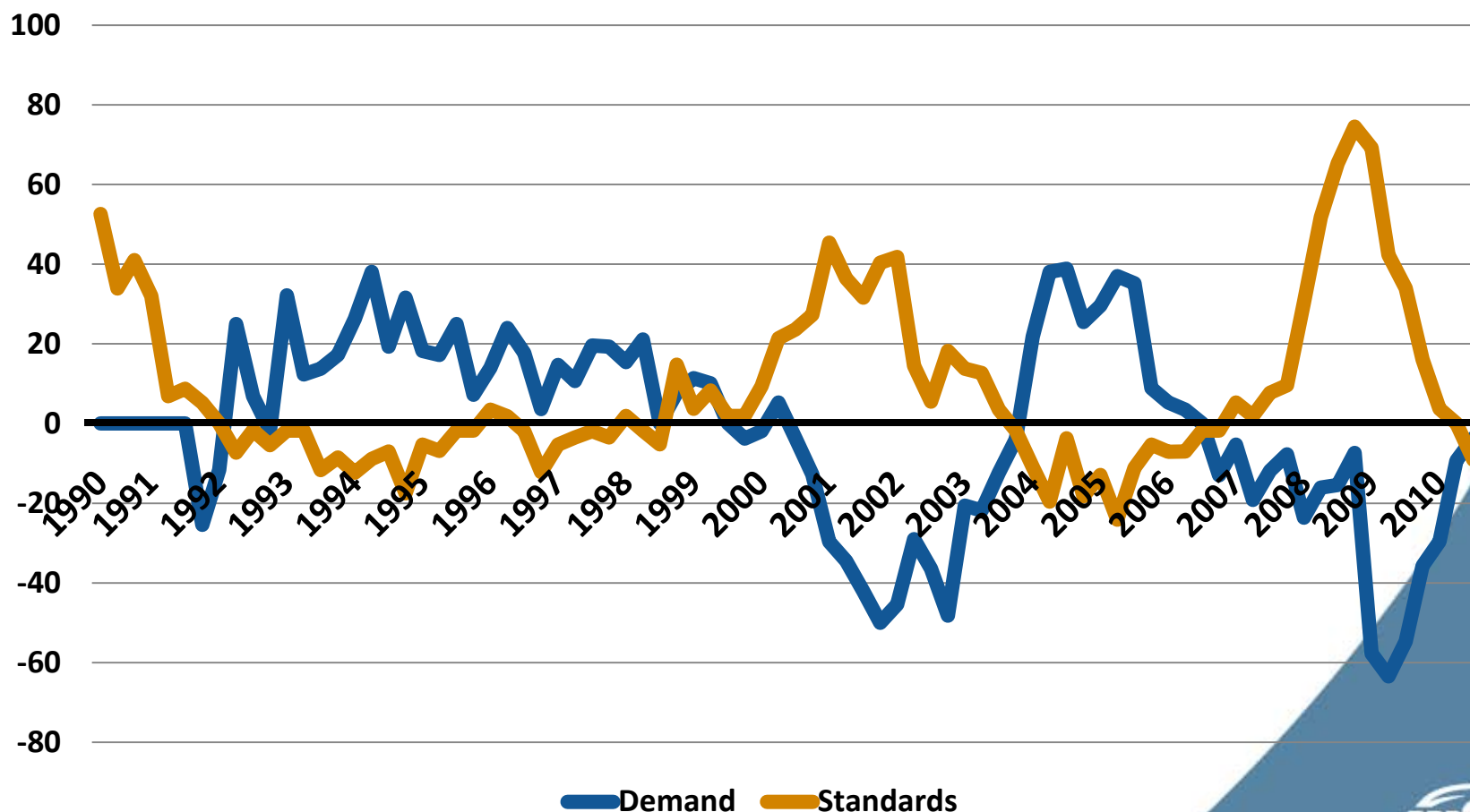
Wichita Business Concerns



Commercial Loan Market

**Can cash and opportunity
meet in the middle?**

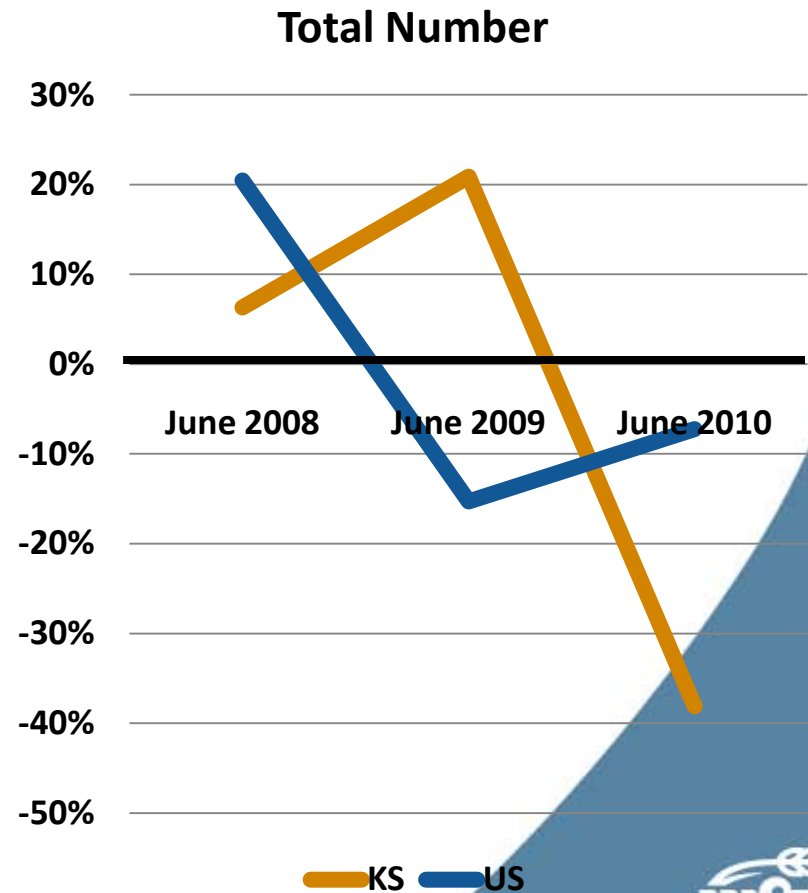
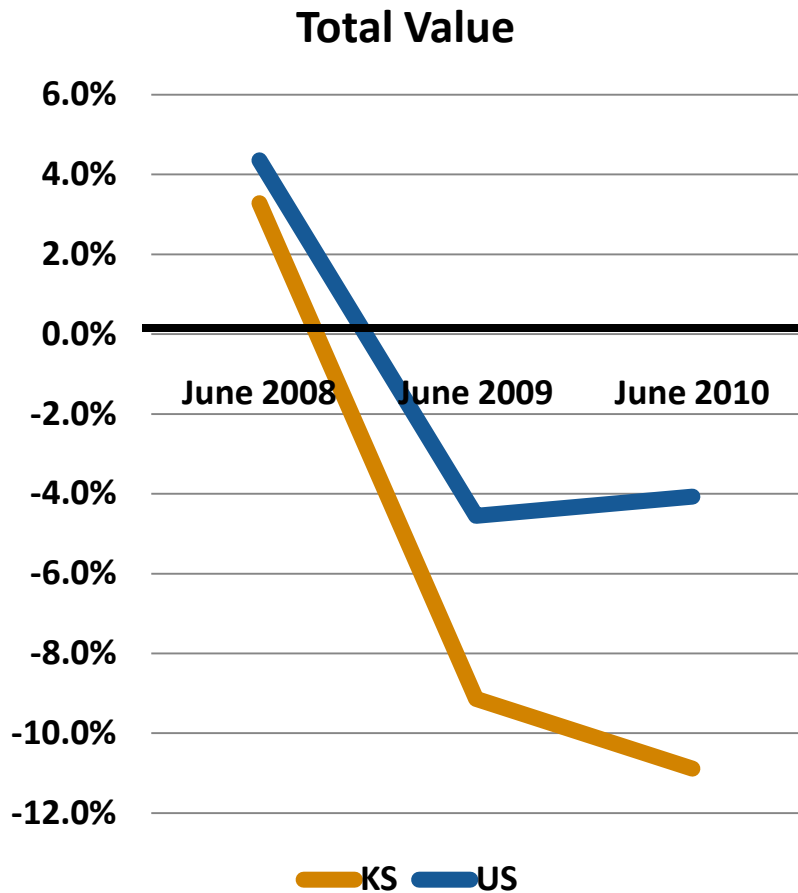
Tightening Standards and Demand for C&I Loans



Data Source: Federal Reserve Board, Senior Loan Officer Opinion Survey and Call Report Data

Small Business Commercial and Industrial Loans

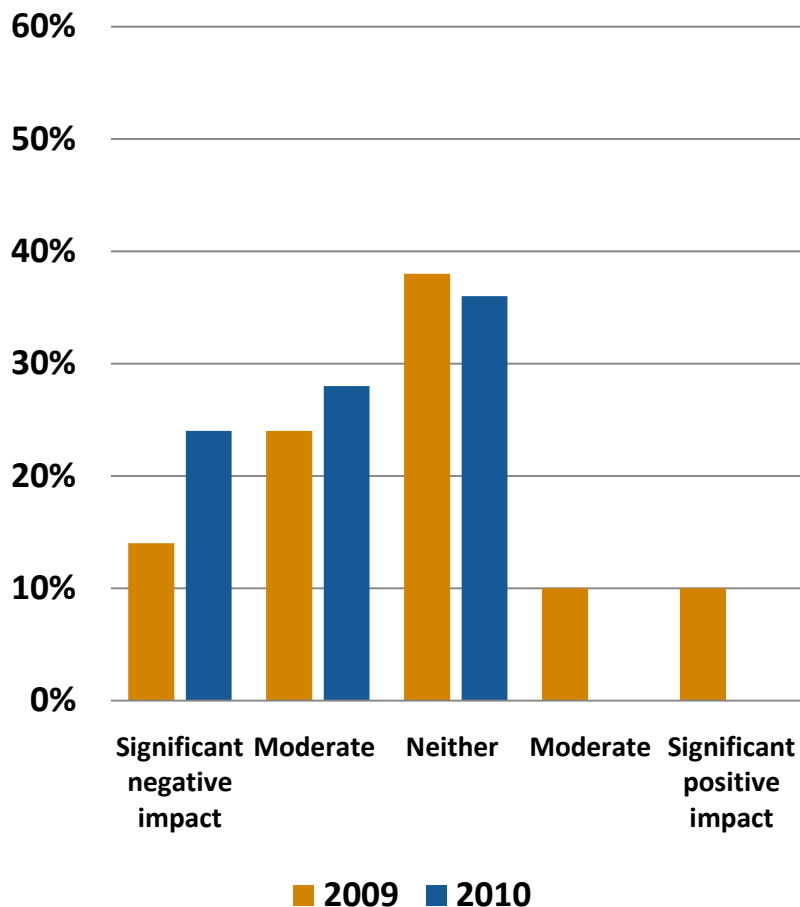
(Year over year)



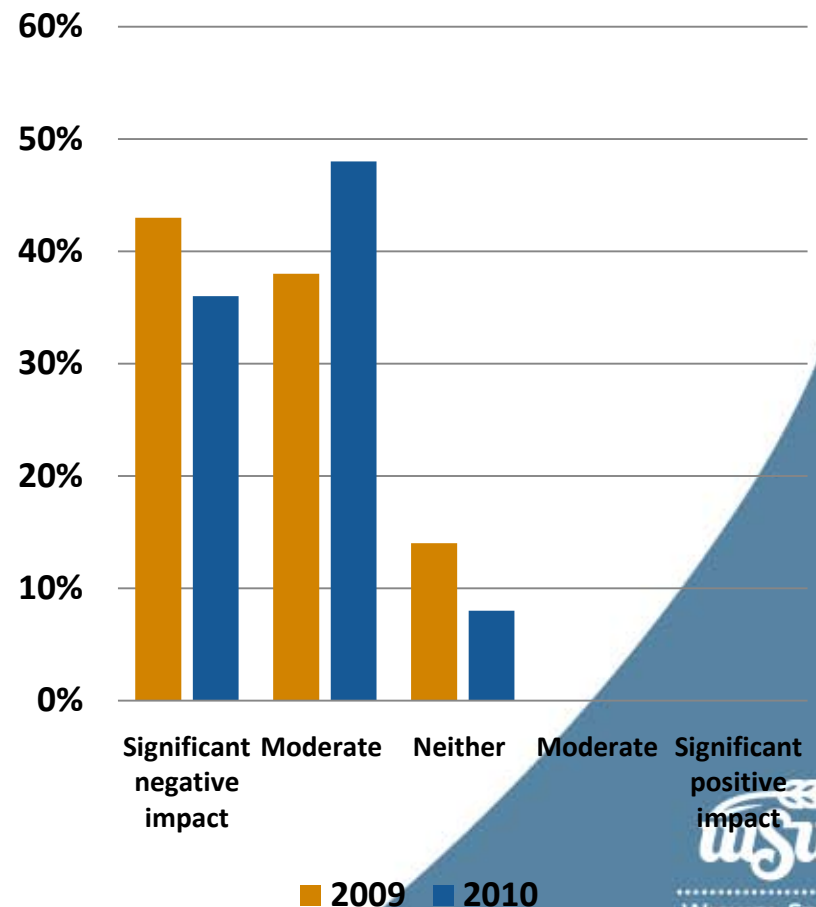
Credit Conditions

Wichita Business Survey

Your Business



Customers

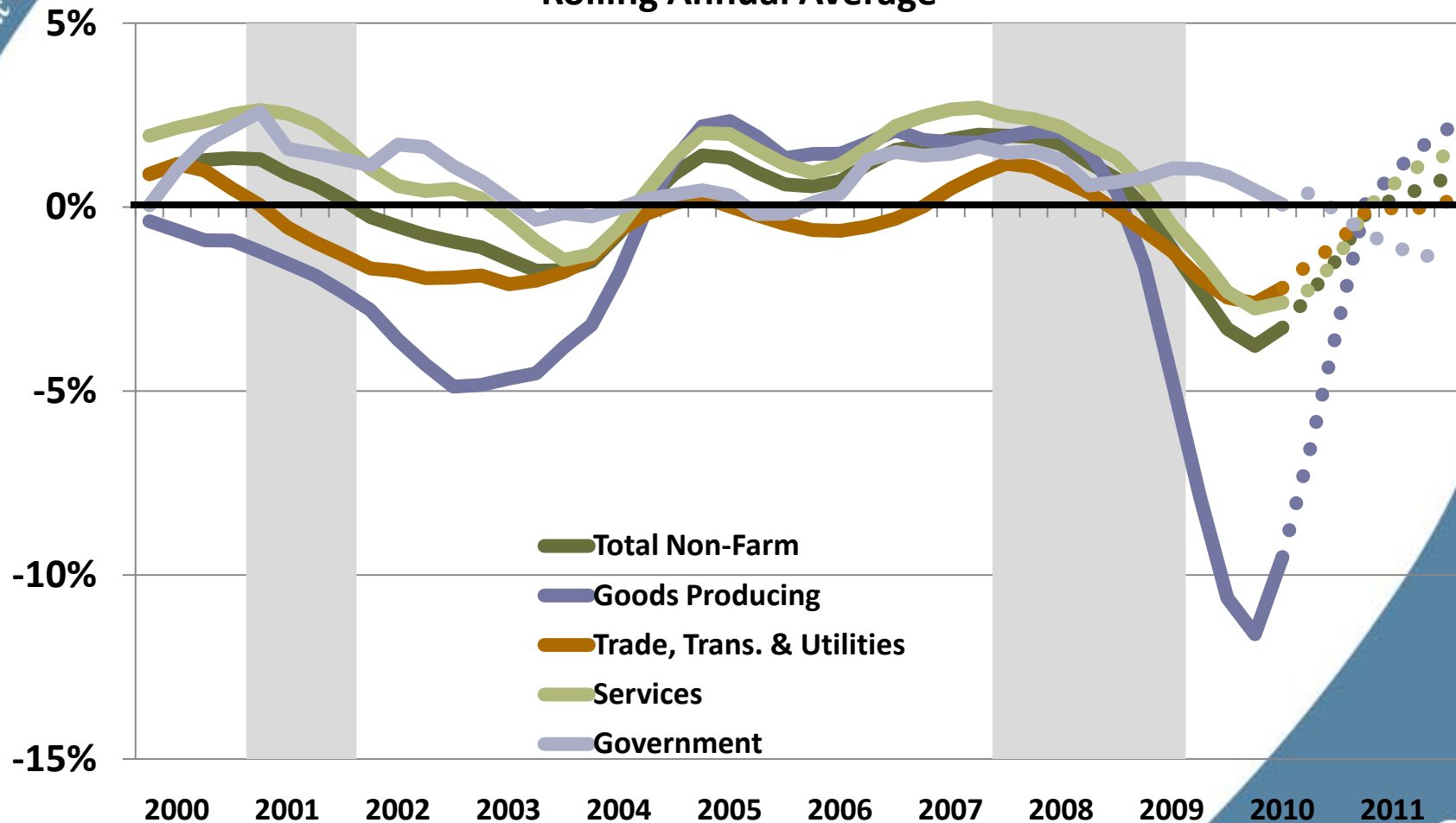


Economic Employment Outlook

What to expect in 2011

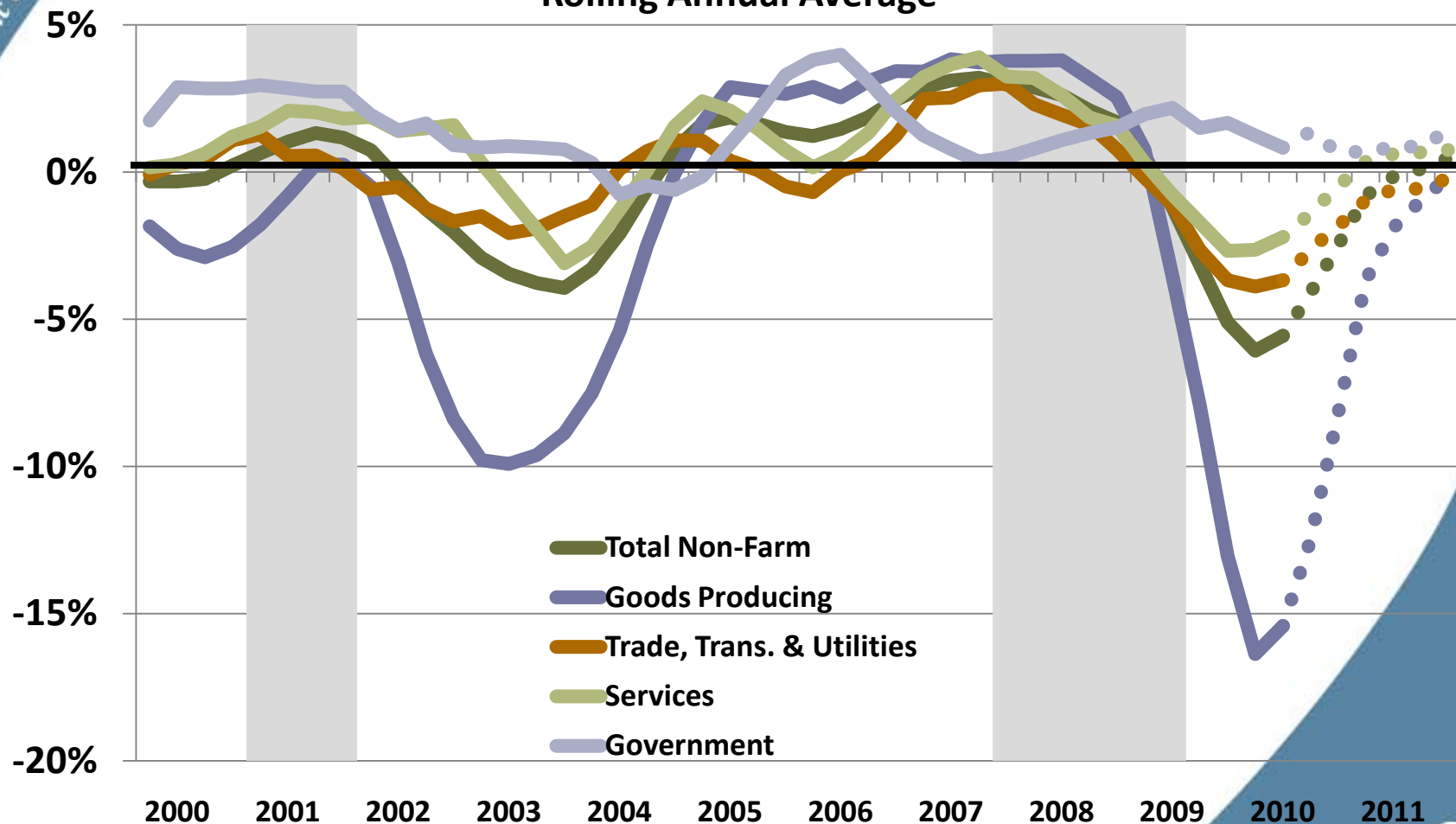
Kansas Employment

Rolling Annual Average



Wichita Employment

Rolling Annual Average



Wichita Retail Sales

Rolling Annual Average

