

# **STAR Bond Economic Impact: Four Area Studies 2021**



Prepared For  
**Kansas Department of Commerce**

By  
**The Docking Institute of Public Affairs  
Fort Hays State University**

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To facilitate Effective Public Policy Decision-Making.

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# **STAR Bond Economic Impact: Four Area Studies 2021**

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## Executive Summary

The Docking Institute of Public Affairs at Fort Hays State University was commissioned by the Kansas Department of Commerce to produce a report that examines the economic impact of STAR Bond projects representing a range of such project types and places. To the extent that data are available, the Institute examines impacts in these zones of interest across in the four STAR Bond community areas selected 1) the STAR Bond district, 2) the adjacent area, 3) the County, and 4) the State.

### General Findings About STAR Bonds

- STAR Bond projects continue to generate sales taxes after the STAR Bonds have been paid off. The net present value of these continuing sales taxes is greater than the diverted sales taxes used to pay off the STAR Bonds.
- STAR Bond projects generate additional tax revenue streams, such as, property taxes and income taxes.
- Individual STAR Bond projects can seem large from the perspective of the local community, but from the perspective of the entire State of Kansas they are relatively small.
- Any STAR Bond project that includes the conversion of “brown ground” to sales tax generating ground has a positive economic impact.
- Economic activity fluctuates over time. Economic growth and development takes time. That is, it does not happen overnight.
- There are positive economic spill-over effects beyond the legal boundaries of STAR Bond projects. Areas close to STAR Bond projects often have development or renovation activities following the completion of the STAR Bond project.



- Accommodations and food services are required by non-local visitors to a STAR Bond project. The demand for accommodations is almost completely driven by non-local visitors.
- STAR Bond projects generally improve the quality of life for residents. Quality of life is important for both business retention and recruitment.
- STAR Bonds are one of several tools that Kansas and local governments can use to enhance the appeal of Kansas as a great place to live and work.

Key informants from among local government administration and/or development offices were interviewed by the Institute about STAR Bond activity in their area, especially with an interest in hearing perceived strengths/opportunities and weaknesses/threats. Key informants expressed the following common threads about STAR Bond projects.

- STAR Bond projects must balance tourism and taxable sales which implies multiple types of development.
- STAR Bond projects allow communities to “think big”.
- Publicly owned land is helpful for successful STAR Bond projects.
- Upgraded infrastructure is helpful for successful STAR Bond projects.
- STAR Bond projects can generate other tax revenue streams, for instance, property taxes and income taxes.
- Development deals, including STAR Bond projects, often take several years from initial idea to completed facilities.
- STAR Bond projects require significant administrative and legal support services which works against smaller communities. Although not limited to

large communities there is a difference between resources available to urban and rural communities.

- Successful STAR Bond projects can change developers' perspective of a community.
- STAR Bond projects often encourage additional development in the vicinity of the project. This may include other retail, as well as, professional offices and housing.
- A critical mass of activities/other things to do nearby makes each STAR Bond project more attractive.

### Wyandotte Unified Government Findings

- The STAR Bonds projects in this area go back to 2001 with the Kansas Speedway being the first, with additional issuings up through the U.S. Soccer Training Facility in 2015. Issuings between those include two issues in Village West, Sporting Park (Now Mercy Children's Park) and Schlitterbahn Waterpark.
- The recent growth of population in Wyandotte County is outside of its major city.
- Historical aerial maps of the NW Wyandotte County area show little evidence of commercial activity and most of the land seemed to be used for agricultural purposes before the STAR Bond projects.
- Although this agricultural "brown ground" land has economic value, it seldom generates sales taxes. Sales taxes are generated from ongoing retail transactions. Thus, new commercial development is likely to generate new sales taxes.
- The time series of maps show the progression of development in and around the STAR Bond project. Again, the point is that development is a long-term process. Secondly, assisting in the development of "brown

ground” into developed land where business activity that generates sales taxes can occur is an important activity.

- The labor data shows that for ZIP code 66112, which is to the east of the STAR Bond projects and is closer to the urban center of the Kansas City MSA, there are often more employees for an economic sector.
- The labor data shows that for ZIP codes 66111 & 66109, the two ZIP codes with very high levels of STAR Bond activity, the increase in the number of employees often occurs after the start of a STAR Bond financed activity and is accompanied by an increase in average wage.
- The Visitor RSC for hotel and motel services in Wyandotte County is consistently above 96 percent, suggesting very high levels of out-of-state stays.
- We found that there were no accommodation employees in ZIP 66111 until 2004 and that 2005 saw a major increase in employees, which has continued through 2018. A similar pattern occurred slightly later in ZIP 66109, but did not occur in ZIP 66112.
- Residential building permit data show an Increase in residential building permits.
- For the past ten years, the business activity as measured by Kansas Sales Tax collected has remained quite stable for the four counties with STAR Bond projects under review. One obvious conclusion is that change is slow and it is very hard to deviate from “normal.”
- These other sources of tax revenue, for example, personal and corporate income taxes and real property taxes, are also spillover effects from the creation of STAR Bond Districts.

## Wichita Findings

- STAR Bond issuings in Wichita are Riverwalk Phase 1 (2007), Riverwalk Phase 2 (2014), K-96/Greenwich (2013), and Lawrence Dumont Stadium area (2016).
- There is strong evidence from the commercial and residential building permit data that the K96 and Greenwich STAR Bond district had significant economic impact both within and adjacent to its boundaries.
- Within the Riverwalk East STAR Bond district most of the building permits were for remodeling while outside the district most of the permits were for new construction. Once again, the spillover effects that arise from a STAR Bond project can be seen in the surrounding area.
- The maps of a project area over time show the development that has occurred both within the STAR Bond district and in the areas adjacent to the district. They also give a sense of the time it takes for development to spread out from the initial project.
- The Riverwalk STAR Bond projects show the limitations of siting projects in an already developed urban area. For instance, the existence of existing hotels and motels tended to suppress growth in this sector in and around the STAR Bond projects in Wichita.

## Hutchinson Findings

- The Kansas Underground Salt Mine (now Strataca) was the STAR Bond issue in Hutchinson in 2006, and has since been fully paid.
- For most of the years from 2007 museum, heritage, zoo, and recreational services in Reno County have a visitor RSC greater than 70 percent.
- NAICS data show that the number of employees in museums, historical sites, and similar institutions began an upward trend starting in 2006.

- Kansas has been collecting sales tax for about 8 years, a longer duration than the diversion of sales taxes before the STAR Bonds for Hutchinson were paid.
- The smaller size of Hutchinson and its more limited governmental resources prevented our acquisition of some location specific data that the two larger communities had collected in electronic format initially, hampering ability to discern some of the more direct measures of STAR Bond impacts in Hutchinson.

### Dodge City Findings

- The Heritage Area Project in 2015 and the Power Center Area Project in 2018 are the two STAR Bond issues in Dodge City.
- Dodge City is the smallest community that we examined and it is the most remotely located. In a sense it is an island separated from the rest of Kansas.
- The Heritage District is located in an already developed part of Dodge City, but there is evidence of some redevelopment, as was previously noted in the Riverwalk district and adjacent areas in Wichita.
- The Power Center District is a “brown ground” retail development, similar to the Kansas Underground Salt Mine District B in that the sales tax partially helps pay the Heritage District bonds.
- Neither the Heritage District (2016) nor the Power Center District (2018) has been completed. Thus, the full impact cannot be measured. However, the maps of each area show that change is occurring.

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## Introduction

The quotation below provides the general parameters for measuring STAR Bond projects; however, the focus is on the legally bounded district and does not consider the secondary economic and social effects that happen outside of the STAR Bond district. A purpose of this study is to identify and, as possible, to measure those secondary economic effects. The purpose of STAR Bonds as summarized in the 2019 STAR Bond Annual Report dated January 31, 2020 is:

The STAR Bond Act was established in 1999 under the Graves Administration. It was originally combined with Tax Increment Financing Act. The two programs were separated in 2007. The related statute is KSA 12-17,160.

Sales Tax Revenue (STAR) Bonds provide Kansas municipalities the opportunity to issue bonds to finance the development of major commercial, entertainment and tourism areas and use the sales tax revenue generated by the development to pay off the bonds. Currently there are 19 projects at various stages of completion and repayment throughout the state.

STAR Bonds are a municipal financing program intended to create tourism and entertainment attractions, drawing visitors from across the region and out of state. The new sales taxes generated by the tourist or entertainment attraction go toward paying down bonds that were issued to help finance the project.

In order to be considered a major commercial entertainment and tourism area, a proposed project must be capable of being characterized as a statewide and regional destination, and include a high quality innovative entertainment and tourism attraction, containing unique features which will increase tourism, generate significant positive and diverse economic and fiscal impacts and be capable of sustainable development over time. Public benefits must exceed public costs.

STAR Bond financing must constitute less than 50% of total project costs. Additionally, retail tenants of projects financed by STAR Bonds must comply with all Kansas laws, including the Kansas “affiliate nexus” law, and collect sales tax on remote sales to Kansas residents.



Of course, the Kansas Department of Revenue collects data on the Kansas sales taxes collected within the legally defined STAR Bond districts. However, to estimate secondary economic benefits that may occur close to or because of a STAR Bond project additional data is needed. There are some data series collected by other Kansas departments or by local governments that are location specific. For example, building permits are issued for a particular property with a known address. For other data series the location is a political entity such as, a local sales tax imposed on sales in a city or a county. In some cases, the ZIP code can be a useful location marker. Unfortunately, for all these other data series the primary reason for the collection of the data was for a specific purpose by the collecting agency that was unrelated to the activities in the STAR Bond district.

In our review of the STAR Bond Projects in Kansas we see the following projects and constellations of projects as being representative of the innovative possibilities and implementations of the STAR Bond program. The constellation of KCK/WUG projects suggest that there is spillover from the initial project and that the success of the initial project leads to additional investment in the adjacent areas. The constellation of Wichita projects also suggests the same experience with an initial successful project that leads to further use of STAR Bond financing. The Hutchinson project involved an innovative splitting of the taxing district from the location of the Salt Mine (located in an industrial area). It also was located in a much smaller community. Finally, the two Dodge City projects are located in a more isolated portion of Kansas and in an even smaller size community. The projects in Dodge City represent both renovation and expansion of well-known tourist attractions and development of a retail area. In this subset of all the Kansas STAR Bond projects, three of these STAR Bond

issues have been paid off, while the remaining bond issues are at various stages of repayment.

The Kansas City, Kansas/Wyandotte Unified Government (KCK/WUG) STAR Bond projects are:

- Kansas Speedway (2001) Sports,
- Village West, Two issues -- (2002, 2003) 2002 issue bonds paid off Retail & Lodging,
- Sporting Park (Now Mercy Children's Park) (2011) Sports,
- U.S. Soccer Training Facility (2015) Sports,
- Schlitterbahn Waterpark (2006) Entertainment.

The Hutchinson STAR Bond project is:

- Kansas Underground Salt Mine, (now called Strataca) (2006) bonds paid off Museum & Retail

The Dodge City STAR Bond projects are:

- The Power Center Area Project (2018) Retail
- The Heritage Area Project (2015) Entertainment & Retail

The Wichita STAR Bond projects are:

- Riverwalk Phase 1 (2007) Bonds paid off Entertainment & Lodging
- Riverwalk Phase 2 (West Bank) (2014) Retail & Housing
- Lawrence Dumont Stadium Area (2016) Sports
- K-96 / Greenwich District (2013) Sports, Retail, & Lodging

## Theory and Methodology

This report is based on a case study approach. The case study method often helps make a complex subject more understandable, particularly when dealing with multiple phases of a project and/or interrelated projects. Additionally, it integrates the external context. In this case, that includes economic activities outside the legal boundaries of a STAR Bond project. Finally, the case study can utilize non-precise data.

A bond is a financial contract (instrument) that facilitates the exchange of future money and present money. A common simple example is a mortgage that many people use to buy a home. A financial intermediary, such as a bank, provides a certain amount of present money in exchange for a series of future money payments. The financial intermediary assumes that the borrower will have an income stream sufficient to meet these future money payments. The more certain the future income stream, the lower the interest rate charged.

In layperson's terms a STAR Bond has a face value which is the amount the buyer of the bond will receive upon maturity, or upon the calling of the bond, if that feature is part of the bond. The buyer of the STAR Bond will also receive interest payments at specified times. The interest rate is fixed at the time of issue. The State of Kansas gets the selling price of the STAR Bond minus whatever flotation costs are associated with the bond issue. In essence the buyer of the STAR Bond is providing present money to Kansas in exchange for future money. This future money is from Sales Taxes collected from sales of goods and services by businesses within the STAR Bond district.

The money raised from the sale of STAR Bonds is used to purchase assets. Assets are things. They can be tangible things like buildings, equipment,

infrastructure, or intangible things like intellectual property. For example, a race track is an asset. It is taxed as personal/corporate property generally on an annual basis. In and of itself the race track does not generate income. A race is an event at a race track. It has both costs (expenses) and income (revenue) associated with the event; and, the race planner/promoter hopes that the income is greater than the costs so that there are profits. Many things are sold at the race event and sales tax is collected. Obviously, the more race events and the more people involved in the race event, particularly spectators, the more sales tax is collected. (Although sales tax is collected by the vendor, the sales tax is paid by the purchaser of the good/service and remitted to the State. Thus, it does not affect the vendor's income statement.) These future sales generate the future sales tax money that will be used to repay the buyer of the STAR Bonds that facilitated the building of the racetrack. And, after the bonds are paid off the future sales will continue to generate future sales tax revenue (money). In other words, the assets financed by the STAR Bonds and the economic activity that occurs using those assets produce an ongoing stream of sales tax revenue for the State of Kansas.

An ongoing stream of revenue is an annuity. The present value of that annuity can be estimated by discounting the future cash flows at an interest rate. We use the long-term (30-year) AAA bond rate as reported by the Saint Louis Federal Reserve Bank. That rate is currently less than three percent and has been below seven and one half percent since 2000. We also assume a fifty-year time horizon starting at the issuance of a STAR Bond. And, we assume that the STAR Bond matures in twenty years. Thus, the annuity is for years 21 through 50. An earlier payoff of the STAR Bond simply moves up the beginning of the annuity and increases the present value of the annuity. Table 1 shows the present value from a \$1,000,000 investment (diverted present sales tax dollars) in a STAR Bond for an annuity (future sales tax dollars) in years 21 through 50 at

a lower (3.0%) discount rate and a higher (7.5%) discount rate. In both cases the present value is greater than the cost of the investment.

Table 1: Present Value of a Thirty Year Annuity, Starting in Twenty-one Years

Discount Rate	Present Value
3.0%	10,852,289.15
7.5%	2,780,320.21

Source: Moody's, Moody's Seasoned Aaa Corporate Bond Yield [AAA], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/AAA>, March 22, 2021.

### Data Collection

In October, 2020 the Docking Institute of Public Affairs [the Institute] gathered names, email addresses, phone numbers, and other relevant contact information to reach key people in the agreed upon four communities (Dodge City, Hutchinson, Wichita, and Wyandotte Unified Government) between the Kansas Department of Commerce and the Institute. Initial contact with all four communities was done via email. On October 27, emails to city managers were sent out informing of them of who we are; what we seek; and an invitation to communicate with the Institute by either email, phone or video call.

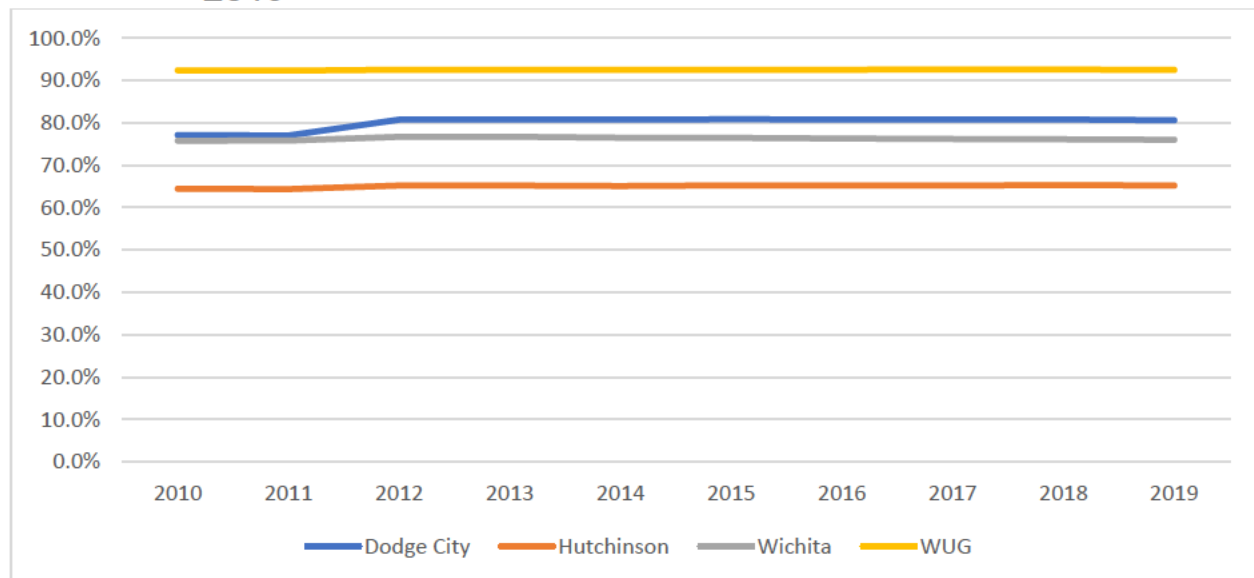
The Institute then established key contacts and hosted video calls or exchanged emails to further clarify what the Institute needed in terms of data as well as understand timeline expectations from each community/entity. Present at all video meetings were Dr. Preston Gilson and Luis Montelongo representing the Institute. Each community/entity would establish a main key contact whose duty it was to transfer relevant data files to Luis Montelongo. Data files were downloaded and stored securely in Fort Hays State University servers only accessible to staff at the Institute.

At the same time that contacts were being established for these communities, the Institute was developing contacts with relevant departments within the state. The two departments were the Kansas Department of Revenue (KDOR) and Kansas Department of Labor (KDOL). The Institute then followed up by hosting video calls with each respective department via either Zoom or Microsoft Teams. Follow-ups by email exchanges were made as needed throughout November 2020 to the date of publishing of study.

The data series that were used to develop measures of the secondary economic and social impacts were in time-series format. Our goal was to have time-series data that covered 1) the period before a STAR Bond project, 2) the time period of the outstanding STAR Bond(s), and 3) the time period following the payoff of the STAR Bonds.

All of the data used and cited in this document was collected by other parties for their own specific needs and purposes. Some of the data is confidential. Because the data was collected by others it is generally aggregated for their purposes. The geographic and temporal boundaries used by these entities limits our ability to estimate economic impacts with the precision that we desire. For example, much of the data is collected at the county level. However, for the STAR Bond projects that are the focus of this report we can make inferences at the city level as each of the cities is, by population, the dominant entity within its county. Graph 1 shows that each of the major governmental entities is also the primary population center for its county. Because economic activity is the result of people creating, exchanging, and using goods and services we can expect that most measures of economic activity at the county level are dominated by the people living in these communities.

Graph 1: Population of Entity as Percentage of County Population, 2010 – 2019



Source: U.S. Census Bureau

For some of the data used we were able to get to the ZIP code level. Again, depending upon the size of the community this permitted some additional precision. Finally, a word concerning the maps, which were used to provide insight into the rate of development for these STAR Bond projects. These maps are historical aerial maps with limited resolution. Many of them were done for, or by, the USDA with its focus on agricultural land.

The K96 and Greenwich STAR Bond project in Wichita and the Legends Racetrack STAR Bond project, as well as the further WUG STAR Bond projects around it, were what can be called “brown ground” projects as the ground was previously used for agriculture. The remaining STAR Bond projects examined in this report all involve some undeveloped parcels of land. Both of the Riverwalk STAR Bond projects in Wichita included some undeveloped land. The Strataca (formerly the Kansas Underground Salt Museum) STAR Bond project involved both an existing retail district with some empty lots and an industrial site. Finally, the Heritage STAR Bond project involves the renovation of existing facilities and

the development of some nearby brown ground. The Power District STAR Bond project utilized “brown ground”. The point here is that although brown ground has economic value, it seldom generates sales taxes.

Sales taxes are generated from ongoing retail transactions. However, in order for a business to have these ongoing retail transactions (revenue) there is a need for a facility. Building and/or renovating a facility (a capital asset) is a costly and time-consuming effort. Most businesses find that they need to borrow funds. Those who lend the funds expect that the future revenue streams will be sufficient to payback both the borrowed funds and the interest payments, too. Further, everyone expects that these future revenue streams will continue even after the borrowed funds have been repaid. The alternative to this usual business practice is to never borrow funds, but rather to delay either renovation and/or construction until all the funds are on-hand as cash.

Finally, it is a basic tenet of public finance that the very best tax is one that is paid by those who are not voters. One of the appeals of STAR Bond financing is that some portion of the purchases associated with the project will be made by visitors from outside of Kansas. Estimating the number of visitors and the amounts of their purchases is a difficult process. We use the concept of Regional Supply Coefficients (RSCs) to estimate the amount of available goods and services within a region that are consumed by those who live in that region. Those who live outside that region then consume the remaining portion. That is,  $1 \text{ minus the RSC for a good or service equals the Visitors' RSC}$ . We also report estimated employment and expenditure level resulting from tourism as published by the Kansas DWP&T and by the U.S. Travel Association.

In the following section, we take a brief look at the national and Kansas economies to provide context for the economic data for each of the four



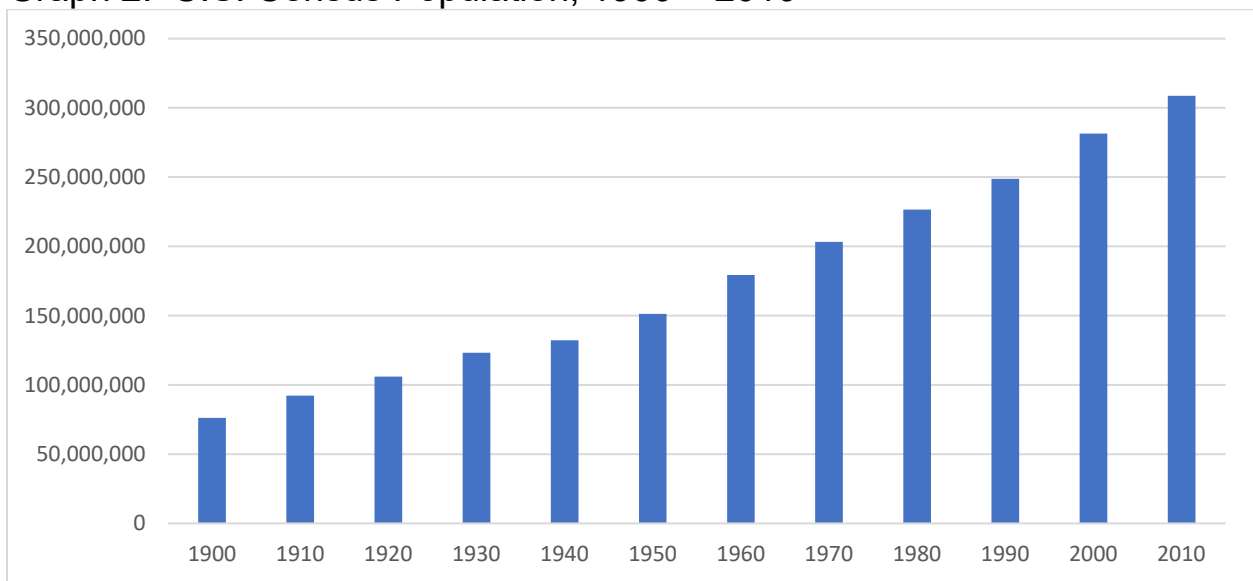
communities with one or more STAR Bond projects. Again, these communities are Wyandotte Unified Government (Wyandotte County, KS), Wichita (Sedgwick County, KS), Hutchinson (Reno County, KS), and Dodge City (Ford County, KS).

## The United States and Kansas

### Population

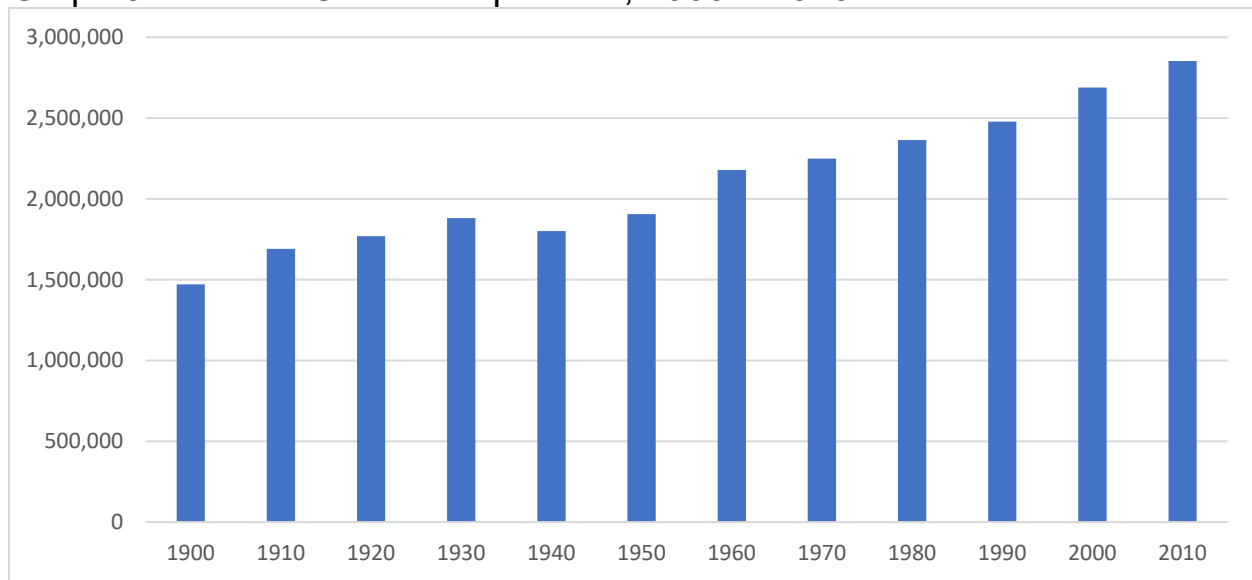
Graphs 2 and 3 show the long term trends for the population of the United States and Kansas based on the decennial census. The U.S. population shows a slight exponential growth while the Kansas growth rate appears more linear. The U.S. population is approximately one hundred times larger than the population of Kansas.

Graph 2: U.S. Census Population, 1900 – 2010



Source: U.S. Census Bureau

Graph 3: Kansas Census Population, 1900 – 2010

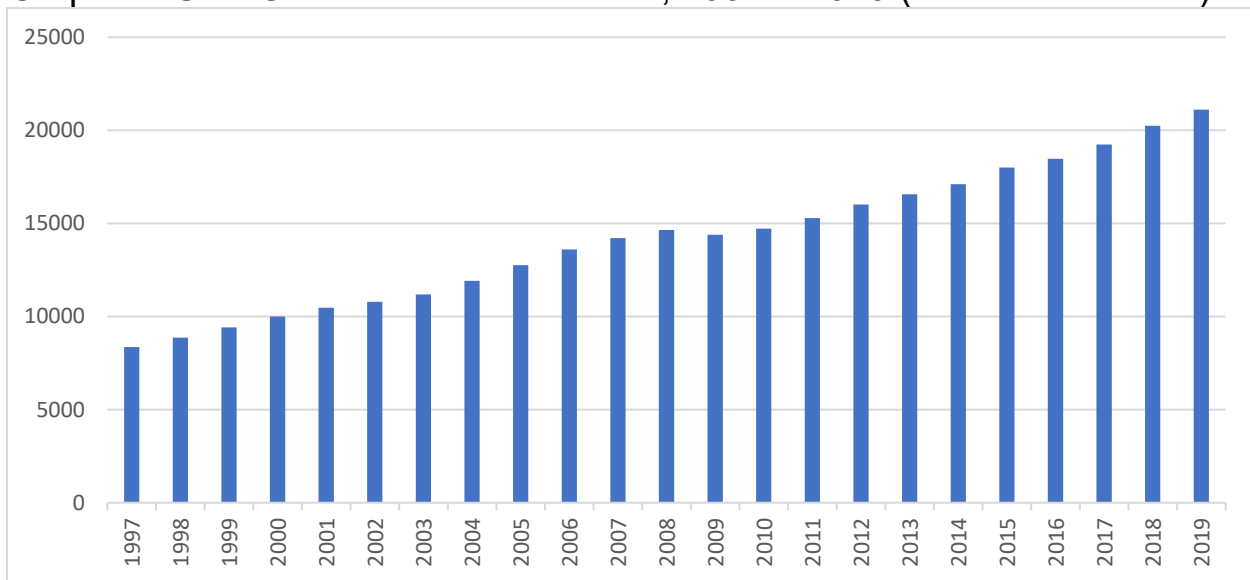


Source: U.S. Census Bureau

### Economic Activity

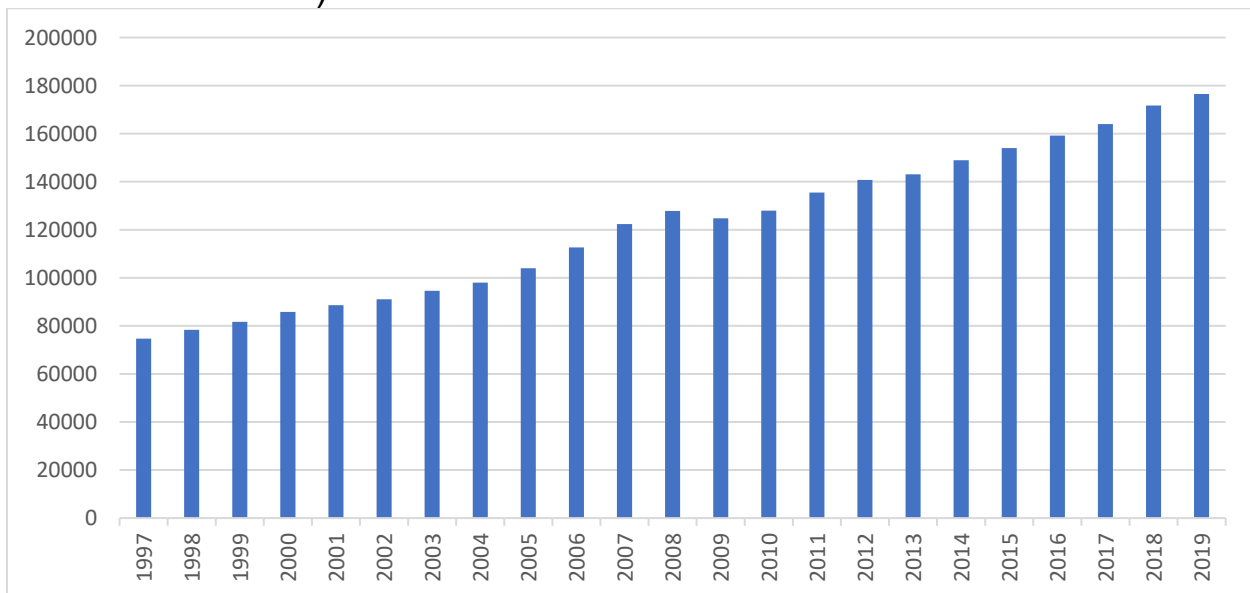
One of the most basic measures of economic activity is the Gross Domestic Product (GDP), which estimates the total output of a country or region. Graphs 4 and 5 show the GDP for the U.S. and Kansas from 1997 to 2019. The U.S. economy is measured in billions of dollars while the Kansas economy is measured in millions of dollars. However, the shapes of the two economies are almost identical. But again Kansas is falling slightly behind as its GDP does not quite double while the U.S. GDP more than doubles in the same period.

**Graph 4: U.S. Gross Domestic Product, 1997 – 2019 (Billions of Dollars)**



Source: FRED, Federal Reserve Bank of Saint Louis, Economic Research Division

**Graph 5: Kansas Gross Domestic Product, 1997 – 2019, (Millions of Dollars)**

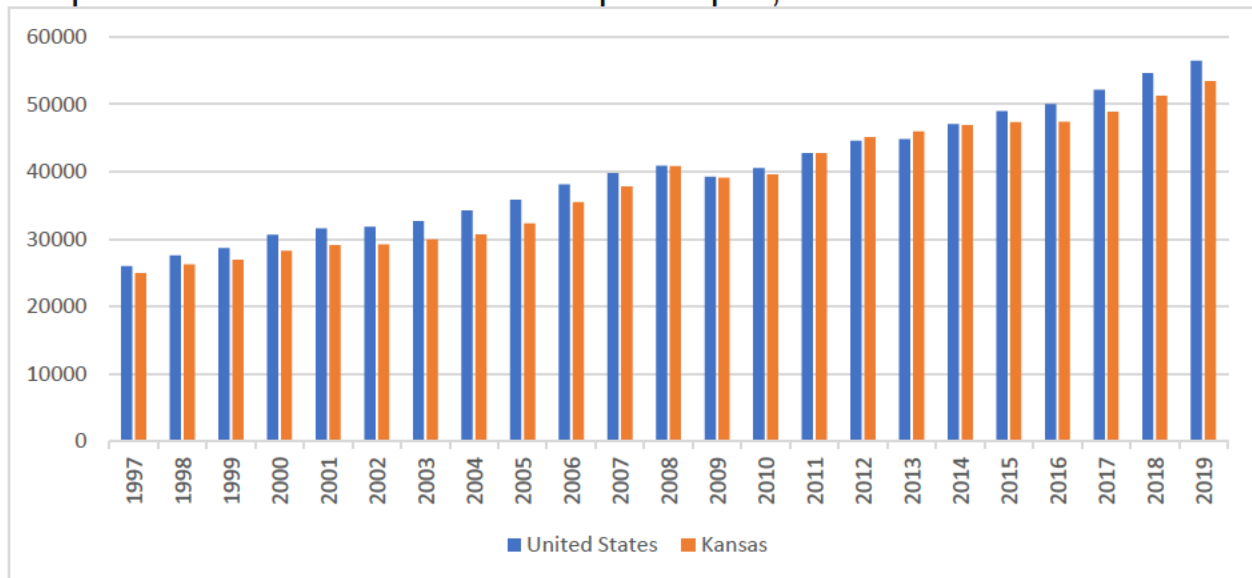


Source: FRED, Federal Reserve Bank of Saint Louis, Economic Research Division

## Income per capita

Graph 6 displays the Income per capita for the U.S. and Kansas. For the most part Kansas lags slightly behind the U.S. although there are a couple of years when Kansas surpassed the U.S. level.

Graph 6: U.S. and Kansas Income per Capita, 1997 – 2019



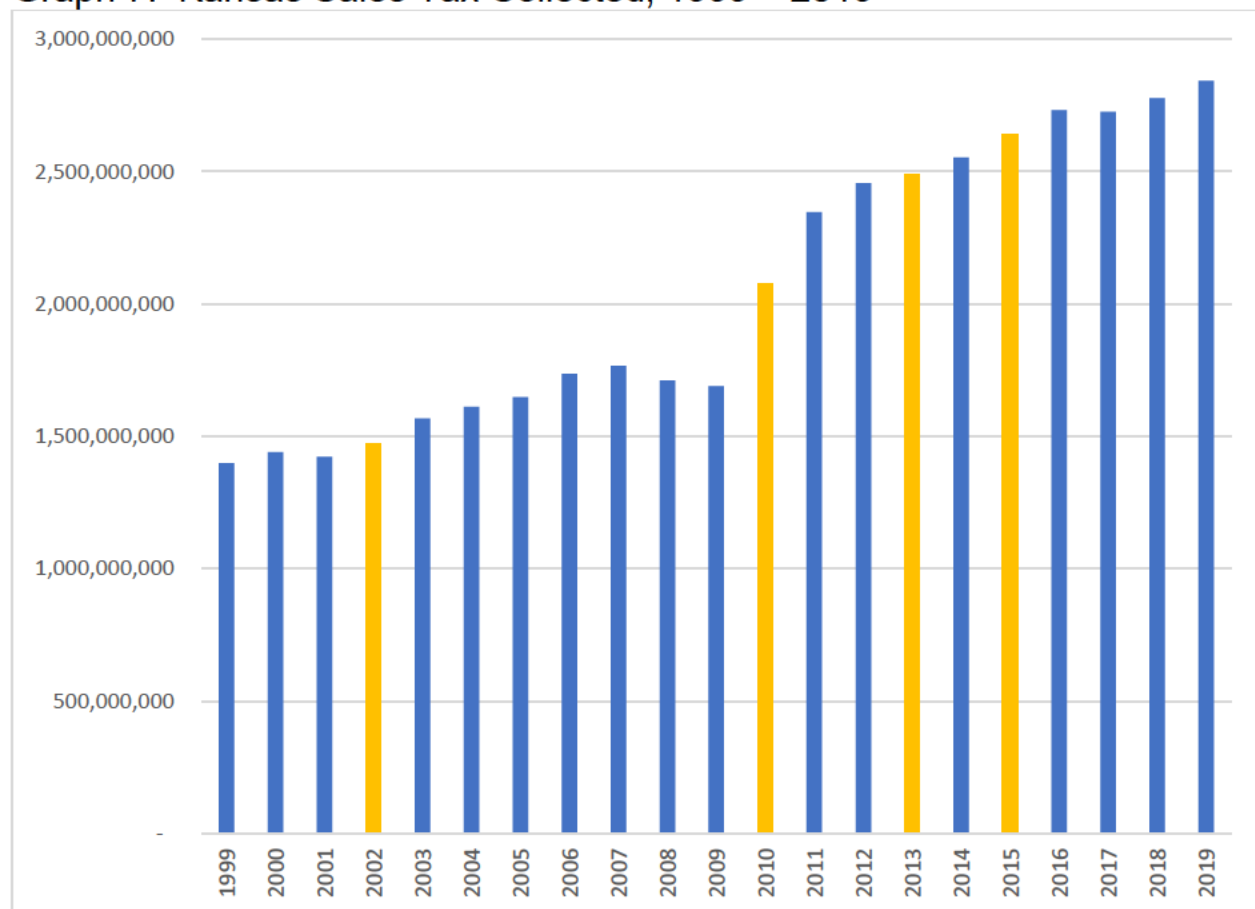
Source: FRED, Federal Reserve Bank of Saint Louis, Economic Research Division

Overall, these measures show that the trends of the Kansas economy closely follow the United States economy.

## Sales Tax

Graph 7 shows the Kansas Sales Tax collected over the past twenty years. During that time, there were four changes in the sales tax rate as shown in Table 2. The orange bars in Graph 7 indicate the years when the sales tax rate changed.

Graph 7: Kansas Sales Tax Collected, 1999 – 2019



Source: KDOR Annual Reports

Changes in the Kansas sales tax rate are determined by the legislature and do not seem to follow a pattern, although they have generally increased over time.

Table 2: Changes in the Kansas Sales Tax Rate

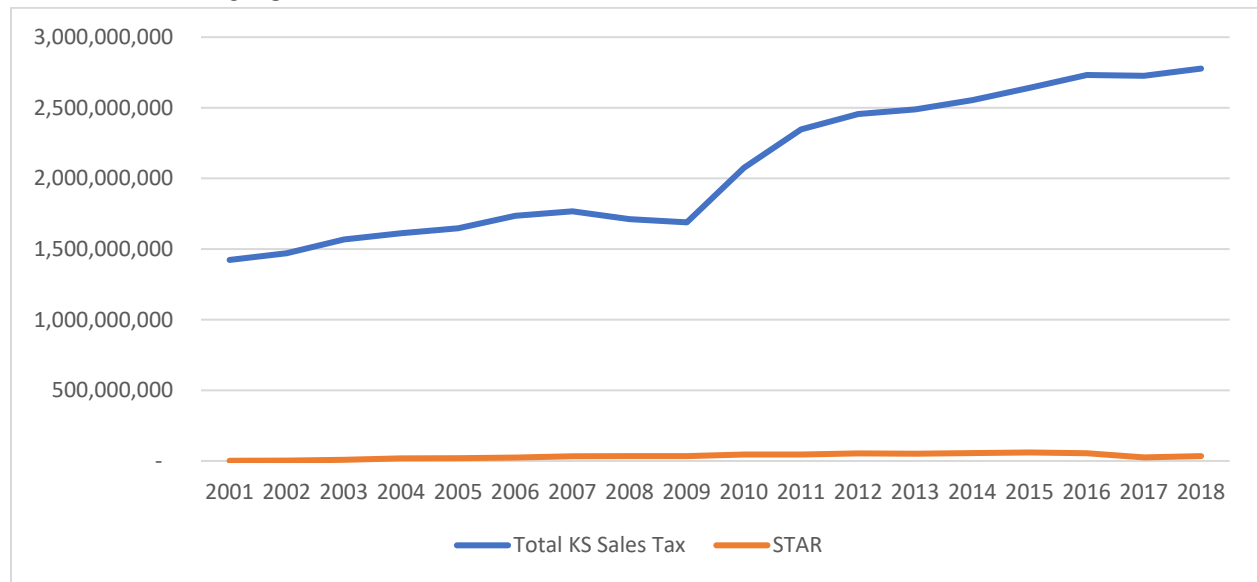
Effective Date	Rate
7/1/92	4.90%
7/1/02	5.30%
7/1/10	6.30%
7/1/13	6.15%
7/1/15	6.50%

Source: KDOR Annual Reports

Graph 8 compares the total Kansas sales tax collected to the portion of the state sales tax allocated to STAR Bonds. The difference in relative amounts is readily

apparent. Table 3 shows the data used for Graph 8, as well as, the percentage of Kansas sales tax that is used by STAR Bonds. The percent of Kansas sales tax used to fund STAR Bond projects is less than 2.3 percent at its highest. The sales tax allocated for STAR Bond projects each year is affected by the number of projects being funded.

Graph 8: Kansas Sales Tax and Portion Allocated to STAR Bonds, 2001 – 2018



Source: Graph generated from KDOR data

**Table 3: STAR Sales Tax as Percent of Kansas Sales Tax, 2001 – 2018**

Year	Total KS Sales Tax	Total STAR Sales Tax	Percent
2001	\$ 1,423,059,270	\$ 1,510,761	0.11%
2002	\$ 1,470,606,510	\$ 2,412,718	0.16%
2003	\$ 1,567,721,762	\$ 8,185,164	0.52%
2004	\$ 1,612,066,627	\$ 18,474,809	1.15%
2005	\$ 1,647,663,056	\$ 19,489,874	1.18%
2006	\$ 1,736,047,957	\$ 24,536,696	1.41%
2007	\$ 1,766,767,978	\$ 32,960,828	1.87%
2008	\$ 1,711,398,084	\$ 33,885,450	1.98%
2009	\$ 1,689,516,431	\$ 34,305,936	2.03%
2010	\$ 2,075,193,413	\$ 45,841,626	2.21%
2011	\$ 2,347,193,367	\$ 45,693,482	1.95%
2012	\$ 2,456,292,294	\$ 53,424,496	2.18%
2013	\$ 2,489,204,048	\$ 51,531,145	2.07%
2014	\$ 2,553,916,849	\$ 56,180,353	2.20%
2015	\$ 2,641,509,076	\$ 60,141,911	2.28%
2016	\$ 2,732,611,350	\$ 55,002,718	2.01%
2017	\$ 2,726,104,521	\$ 24,997,738	0.92%
2018	\$ 2,777,596,571	\$ 34,424,715	1.24%

Source: Data from KDOR, calculations by the author.

Table 4 provides the state and local STAR Bond distributions. The proportion from each source provides evidence of local buy in on these projects and support for their successful completion. The year 2015 was the highest level of state and local distributions.



Table 4: Total STAR Bond Distributions by Calendar Year

Calendar Year	State Distribution	Local Distribution
2001	\$1,510,760.79	\$604,801.42
2002	\$2,412,718.23	\$870,251.52
2003	\$8,185,163.87	\$2,826,753.61
2004	\$18,474,809.07	\$5,899,779.14
2005	\$19,489,873.72	\$7,781,574.82
2006	\$24,536,696.18	\$11,159,888.47
2007	\$32,960,828.48	\$13,264,434.01
2008	\$33,885,450.29	\$13,276,588.75
2009	\$34,305,935.75	\$13,065,912.08
2010	\$45,841,626.31	\$14,008,931.21
2011	\$45,693,481.94	\$15,641,466.08
2012	\$53,424,496.48	\$17,901,635.25
2013	\$51,531,145.25	\$17,664,796.77
2014	\$56,180,352.60	\$18,001,086.24
2015	\$60,141,911.33	\$19,242,123.79
2016	\$55,002,718.45	\$19,229,839.41
2017	\$24,997,737.77	\$3,811,137.27
2018	\$34,424,714.56	\$3,364,922.40
2019*	\$35,896,081.52	\$4,917,422.06
*through September		
Total	\$638,896,502.59	\$202,533,344.30
Percent	75.93%	24.07%

Source: KDOR

Graph 9 shows that for the past ten years the business activity as measured by Kansas Sales Tax collected has remained quite stable for the four counties with STAR Bond projects under review. One obvious conclusion is that it is very hard to deviate from “normal”. Although the Sales Tax rate has changed from time to time the trend in amount of Sales Tax collected has remained quite stable.

Compensating Use Taxes are independent from Sales Taxes, but related in concept. Table 5 shows Use Taxes as a percentage of Sales Taxes remained relatively constant until 2018. Part of the explanation may lie in the effects of

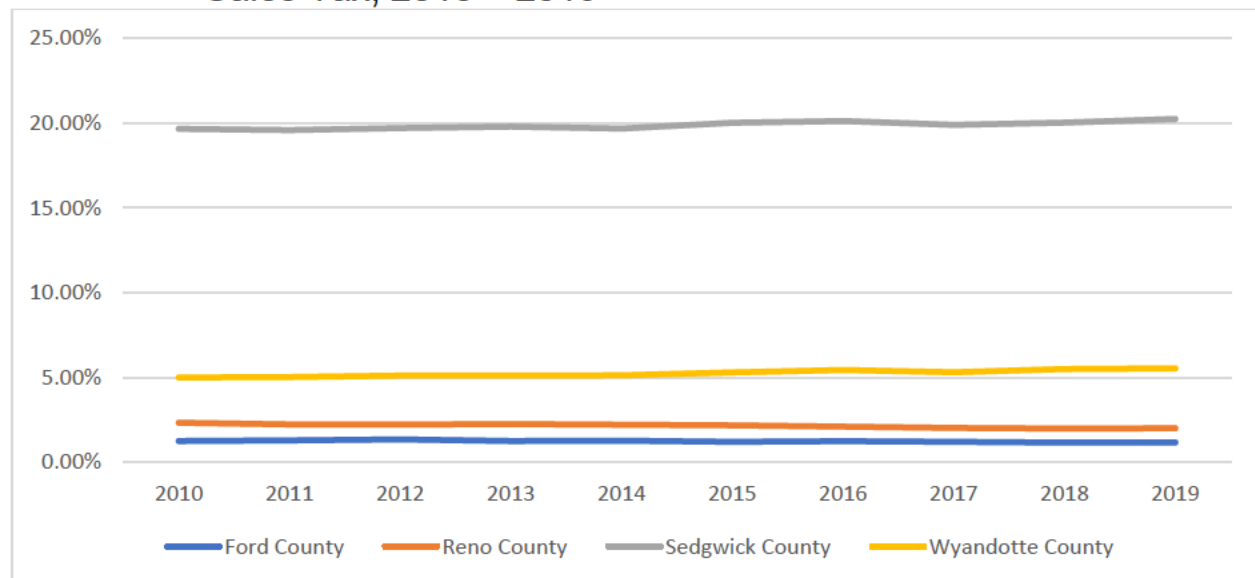
Streamline Sales Tax Project.<sup>1</sup> The Kansas Local and State Use tax previously reported on K-40 was several orders of magnitude smaller than the later numbers.<sup>2</sup> Some data sources separate sales taxes and use taxes, while others may report the total as sales taxes. Except for this instance, the report assumes that data reported as “sales” taxes does not include “use” taxes.

**Table 5: Kansas Use Tax as a Percentage of Sales Tax, 2012 – 2019**

Year	Percentage
2012	13.2%
2013	13.7%
2014	13.5%
2015	13.3%
2016	14.1%
2017	14.1%
2018	18.0%
2019	19.5%

Source: Data from various KDOR reports, calculations by the author. See KDOR Sales Tax.xlsx, Use Tax

**Graph 9: Kansas Sales Tax by County as a Percentage of Total Kansas Sales Tax, 2010 – 2019**



<sup>1</sup> State of Kansas. Department of Revenue. Annual Statistical Report, Fiscal Year Ending June 30, 2017. p.34.

<sup>2</sup> Ibid. p.48.

**Table 6: Kansas Sales Tax by County, 2019**

Ford County	\$ 33,115,669
Reno County	\$ 56,942,977
Sedgwick County	\$ 575,431,484
Wyandotte County	\$ 157,244,411
Kansas	\$ 2,842,613,542

Source: Kansas Department of Revenue. Office of Research and Analysis State Sales Tax Collections for 2019. File name: cy19revised.pdf my file: KDOR Sales Tax.docx

Table 6 shows the actual dollar amounts of the Kansas Sales Tax collected by county for 2019. From Graph 9 it is clear that there is little fluctuation in the amounts of Kansas Sales Tax collected by county. In Table 6, one can see that even a million dollars is only 3 percent of the annual Kansas Sales Tax in Ford County. For the State of Kansas that same million dollars is 0.035 percent of the annual Kansas Sales Tax collected.

## Visitor Regional Supply Coefficient

The Visitor Regional Supply Coefficient (Visitor RSC) is a measure of the share of a good or service that is consumed by non-residents of an area during a specified time period. It is affected both by the amount of the good or service that is provided within the area during the time period and the amount of that good or service that residents of the area consume.

For example, most residents of an area have little need for lodging in hotels or motels while those who live outside the area are the vast majority of consumers of hotel and motel rooms. Therefore, the Visitor RSC for hotel and motel services in Kansas for 2019 is 98.83 percent as shown in Table 7.

At the opposite end of the spectrum is the category, “all other food and drinking place services,” which excludes both full service restaurants and limited service restaurants. The consumers of these services are almost exclusively local residents. Thus, the Visitor RSC for all other food and drinking place services in Kansas for 2019 is less than 1 percent as shown in Table 7.

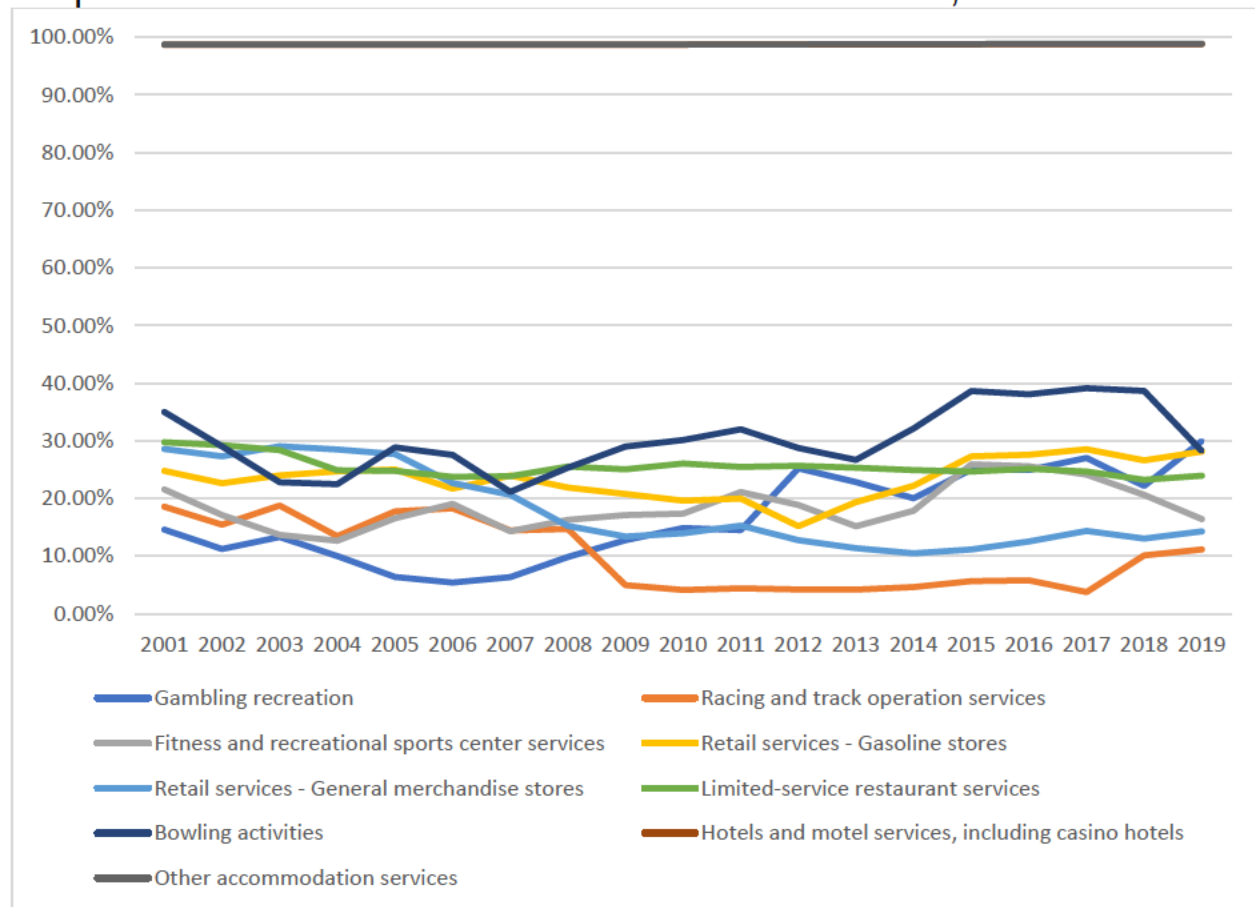
Table 7: Visitor RSCs, Kansas 2019

Description	Visitor RSC
All other food and drinking place services	0.90%
Museum, heritage, zoo, and recreational services	1.22%
Amusement parks and arcades	1.52%
Commercial sports except racing	2.01%
Performing arts	2.09%
Full-service restaurant services	2.24%
Retail services - Health and personal care stores	2.95%
Retail services - Clothing and clothing accessories stores	6.20%
Retail services - Miscellaneous store retailers	6.53%
Retail services - Food and beverage stores	8.49%
Racing and track operation services	11.15%
Retail services - Sporting goods, hobby, musical instrument and book stores	13.57%
Retail services - General merchandise stores	14.28%
Other amusement and recreation	15.34%
Fitness and recreational sports center services	16.42%
Limited-service restaurant services	23.93%
Retail services - Gasoline stores	28.13%
Bowling activities	28.21%
Gambling recreation	29.96%
Hotels and motel services, including casino hotels	98.83%
Other accommodation services	98.88%

Source: Data from Implan, calculations by the author.

The following graphs and tables show both the variation that can occur in Visitor RSCs over time and the relative consistency of these Visitor RSCs. Please note, the values for “hotels, motels, including casino hotels” shown in graph 10 are almost identical to “other accommodation services.” They overlap each other. The percentages for all categories are found in table 8.

Graph 10: Kansas Visitor RSC Greater Than 10 Percent, 2001



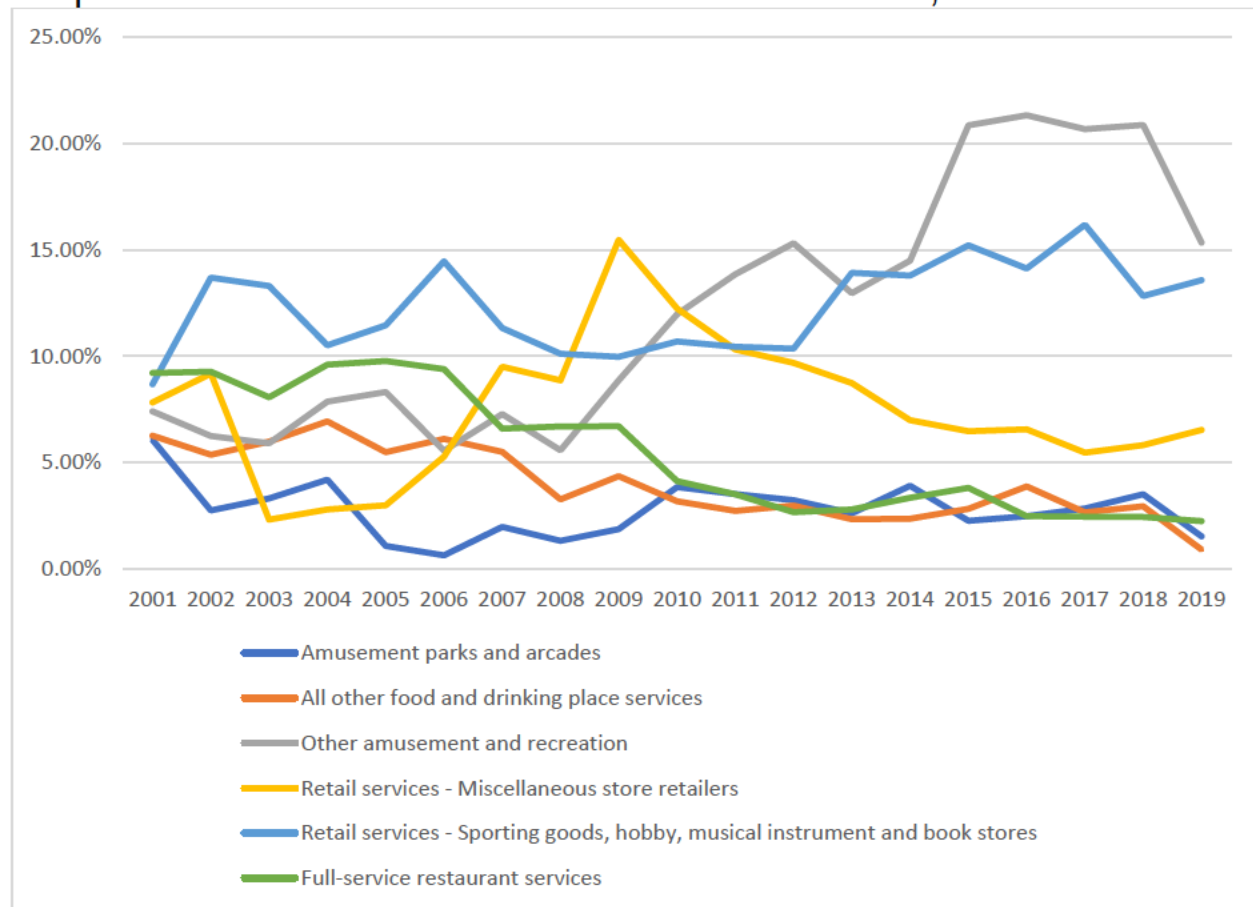
Source: Data from Implan, calculations by the author.

Table 8: Kansas Visitor RSCs, 2001 and 2019

Description	2001	2019
Gambling recreation	14.59%	29.96%
Racing and track operation services	18.56%	11.15%
Fitness and recreational sports center services	21.56%	16.42%
Retail services - Gasoline stores	24.76%	28.13%
Retail services - General merchandise stores	28.57%	14.28%
Limited-service restaurant services	29.74%	23.93%
Bowling activities	34.98%	28.21%
Hotels and motel services, including casino hotels	98.68%	98.83%
Other accommodation services	98.74%	98.88%

Source: Data from Implan, calculations by the author.

Graph 11: Kansas Visitor RSC 10 Percent to 5 Percent, 2001



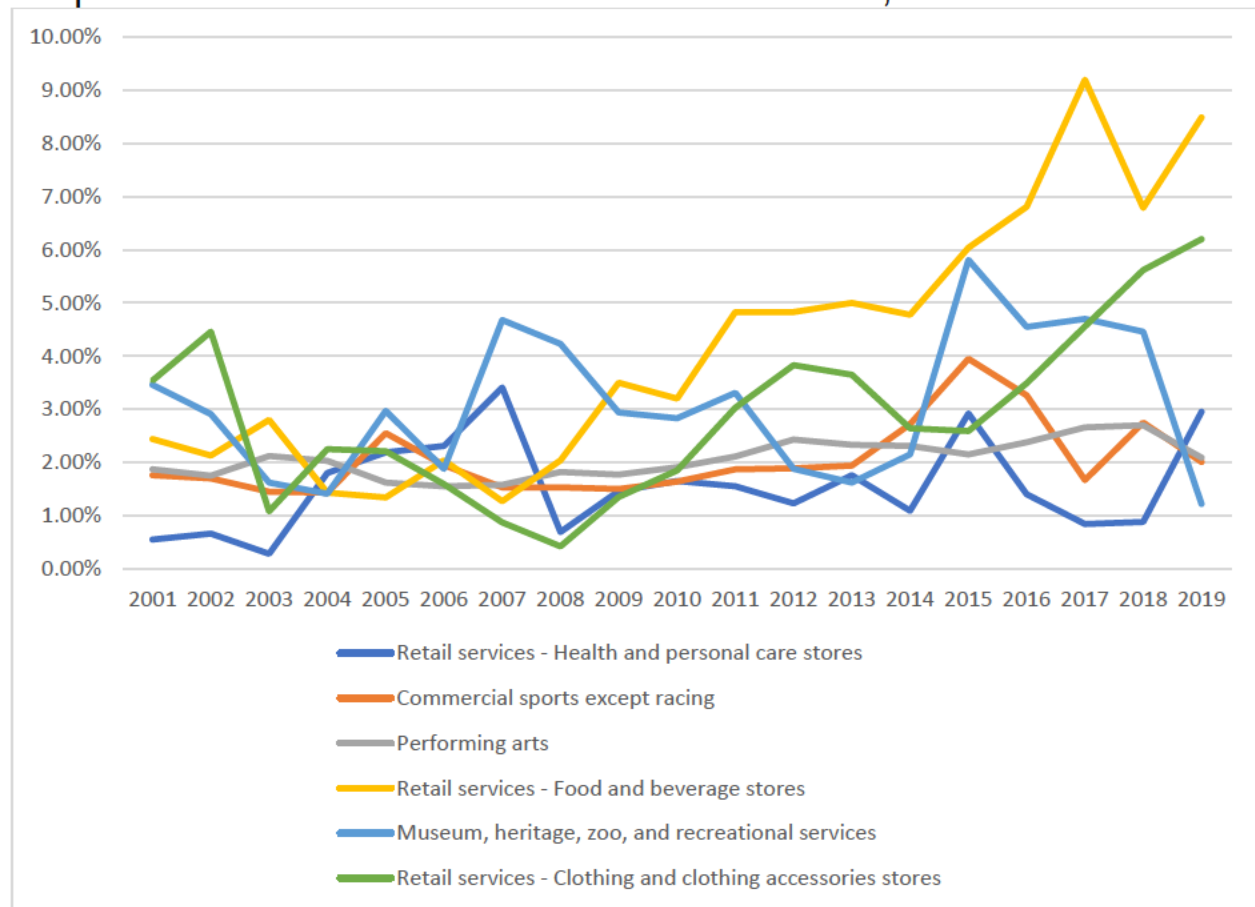
Source: Data from Implan, calculations by the author.

Table 9: Kansas Visitor RSCs, 2001 and 2019

Description	2001	2019
Amusement parks and arcades	6.06%	1.52%
All other food and drinking place services	6.26%	0.90%
Other amusement and recreation	7.40%	15.34%
Retail services - Miscellaneous store retailers	7.82%	6.53%
Retail services - Sporting goods, hobby, musical instrument and book stores	8.68%	13.57%
Full-service restaurant services	9.21%	2.24%

Source: Data from Implan, calculations by the author.

Graph 12: Kansas Visitor RSC Less Than 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Table 10: Kansas Visitor RSCs, 2001 and 2019

Description	2001	2019
Retail services - Health and personal care stores	0.55%	2.95%
Commercial sports except racing	1.76%	2.01%
Performing arts	1.87%	2.09%
Retail services - Food and beverage stores	2.44%	8.49%
Museum, heritage, zoo, and recreational services	3.46%	1.22%
Retail services - Clothing and clothing accessories stores	3.54%	6.20%

Source: Data from Implan, calculations by the author.



## Tourism

The U.S. Travel Association is an industry trade association that provides estimated industry data based in part on information from its members. Tables 11 and 12 provide a big picture view of travel in the United States. Leisure travel is the major component of total travel in the U.S.

Table 11: U.S. Travel Industry Estimated Direct Impact, 2019

	Spending	Employment	Tax Revenues	Person Trips
Total	972,000,000,000	7,900,000	154,800,000,000	2,317,000
Leisure	681,800,000,000	5,700,000	106,300,000,000	1,853,000
Percent	70.14%	72.15%	68.67%	79.97%

Source: U.S. Travel Association

Person Trip is defined by the U.S. Travel Association as one person on a trip away from home overnight in paid accommodation, or on a day or overnight trip to places 50 miles or more, one-way, from home.

Table 12: Selected Domestic (U.S.) Travel Expenses, 2019

Category	Percent
Lodging	20%
Food Services	25%
Recreation/Amusement	11%
Retail	7%
Transportation	37%

Source: U.S. Travel Association

Table 12 shows that transportation is the largest aggregate travel expense. Food services and lodging together account for 45 percent of domestic travel expenses.

Table 13 provides estimates of visitor spending for Kansas. The data series is generally revised for previous years when a new year is released. The data is

sometimes annual and sometimes biannual. However, the overall trend is quite stable.

Table 13: Kansas Visitor Spending, 2010 – 2017 (millions of dollars)

	2010	2011	2012	2013	2015	2017
<b>Total</b>	<b>\$5,063.93</b>	<b>\$5,367.27</b>	<b>\$5,817.42</b>	<b>\$5,966.22</b>	<b>\$6,493.92</b>	<b>\$6,787.76</b>

Source: Kansas Department of Wildlife, Parks, and Tourism

## General Findings About STAR Bonds

- STAR Bond projects continue to generate sales taxes after the STAR Bonds have been paid off. The net present value of these continuing sales taxes is greater than the diverted sales taxes used to pay off the STAR Bonds.
- STAR Bond projects generate additional tax revenue streams, such as, property taxes and income taxes.
- Individual STAR Bond projects can seem large from the perspective of the local community, but from the perspective of the entire State of Kansas they are relatively small.
- Any STAR Bond project that includes the conversion of “brown ground” to sales tax generating ground has a positive economic impact.
- Economic activity fluctuates over time. Economic growth and development takes time. That is, it does not happen overnight.
- There are positive economic spill-over effects beyond the legal boundaries of STAR Bond projects. Areas close to STAR Bond projects often have development or renovation activities following the completion of the STAR Bond project.
- Accommodations and food services are required by non-local visitors to a STAR Bond project. The demand for accommodations is almost completely driven by non-local visitors.
- STAR Bond projects generally improve the quality of life for residents. Quality of life is important for both business retention and recruitment.
- STAR Bonds are one of several tools that Kansas and local governments can use to enhance the appeal of Kansas as a great place to live and work.

Key informants from among local government administration and/or development offices were interviewed by the Institute about STAR Bond activity in their area, especially with an interest in hearing perceived strengths/opportunities and weaknesses/threats. Key informants expressed the following common threads about STAR Bond projects.

- STAR Bond projects must balance tourism and taxable sales which implies multiple types of development.
- STAR Bond projects allow communities to “think big”.
- Publicly owned land is helpful for successful STAR Bond projects.
- Upgraded infrastructure is helpful for successful STAR Bond projects.
- STAR Bond projects can generate other tax revenue streams, for instance, property taxes and income taxes.
- Development deals, including STAR Bond projects, often take several years from initial idea to completed facilities.
- STAR Bond projects require significant administrative and legal support services which works against smaller communities. Although not limited to large communities there is a difference between resources available to urban and rural communities.
- Successful STAR Bond projects can change developers’ perspective of a community.
- STAR Bond projects often encourage additional development in the vicinity of the project. This may include other retail, as well as, professional offices and housing.
- A critical mass of activities/other things to do nearby makes each STAR Bond project more attractive.

## Analysis of Selected STAR Bond Sites

This study focuses on selected STAR Bond projects located throughout the State of Kansas. These projects were chosen to show the range of projects throughout the history of the STAR Bond program. Some of the STAR Bonds have been completely paid off and others are still being paid off. The remainder of the report is organized into sections by the four selected STAR Bond community areas.

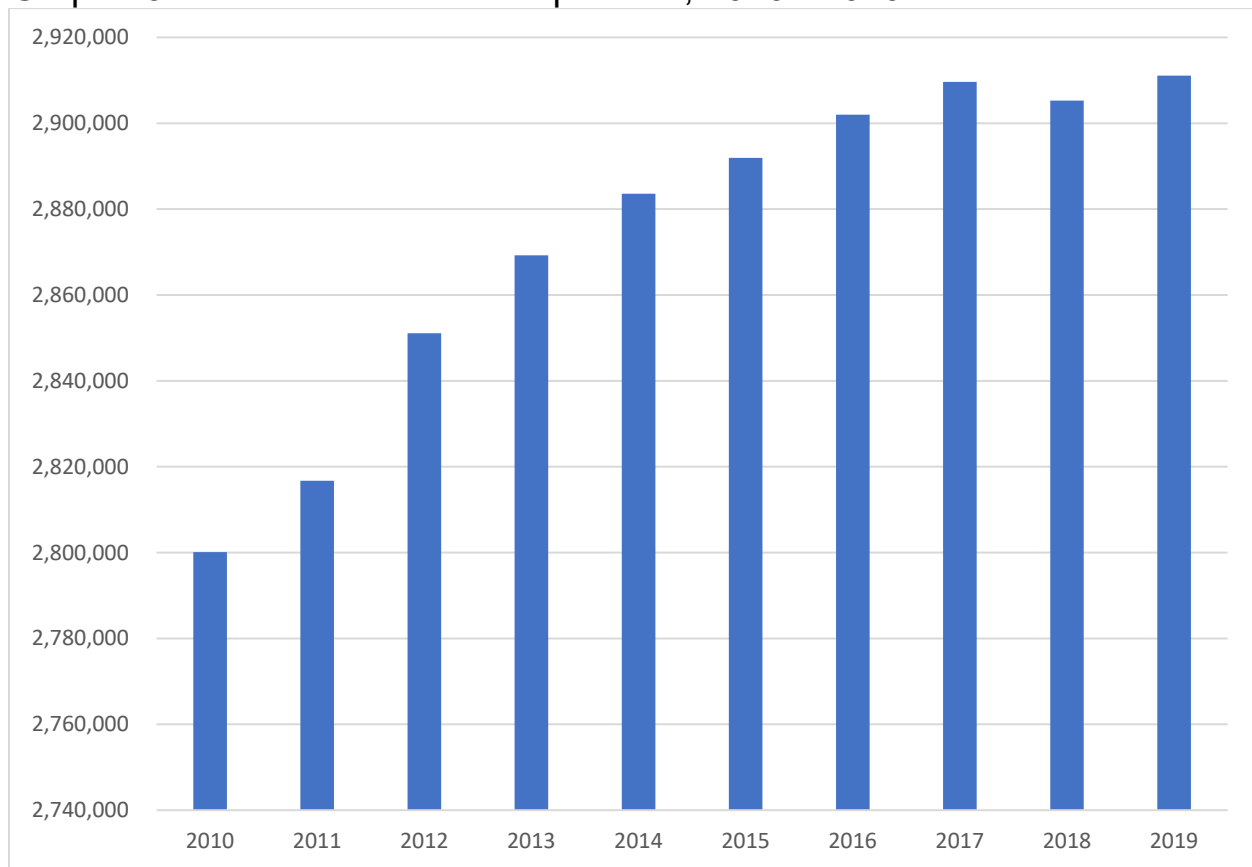
The Docking Institute collected multiple forms of data. The major data elements include county-level data on population, sales tax, visitors' RSCs; NAICS data at ZIP code level; STAR Bond district adjacent building permit data for certain districts; and maps. The data is provided at the county level and at two, or more, points in time. These points in time are generally the year before a STAR Bond project is started, the conclusion of the STAR Bond project, and the last year of available data. The underlying data set is available from 2001 and the complete series can be found in an appendix. The report presents data on building permits for the area(s) around a STAR Bond project for some of the projects where this data was readily available. Such construction has occurred for STAR Bond projects on "brown ground" as well as those projects that are located in areas already well developed. Finally, maps of the affected STAR Bond project areas are shown before the project began against the most recent available map. Aerial mapping was not generally done on a regular schedule due to weather and needs of the USDA and other mapping agencies. However, a series of maps over time can show how an area changes and develops.

## Wyandotte Unified Government

The STAR Bonds projects in this area go back to 2001 with the Kansas Speedway being the first, with additional issuings up through the U.S. Soccer Training Facility in 2015. Issuings between those include two issues in Village West, Sporting Park (Now Mercy Children's Park) and Schlitterbahn Waterpark.

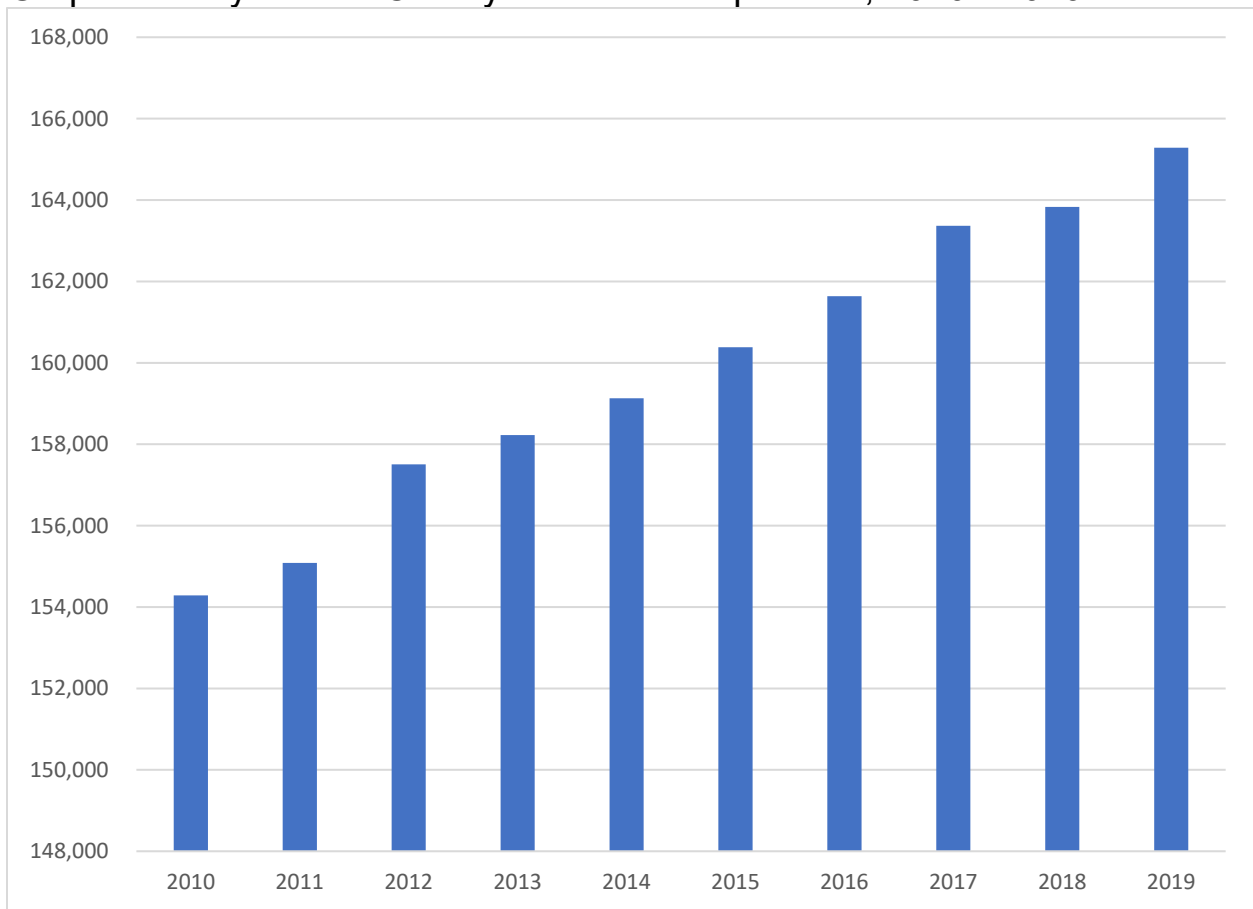
Again, our method is to look at the larger context and then focus on the specific STAR Bond projects. Because people are the major economic agents, either as producers of goods and services or as consumers of them, we consider population. Graphs 13 and 14 show the estimated population for Kansas and Wyandotte County for the last decade.

**Graph 13: Kansas Estimated Population, 2010 - 2019**



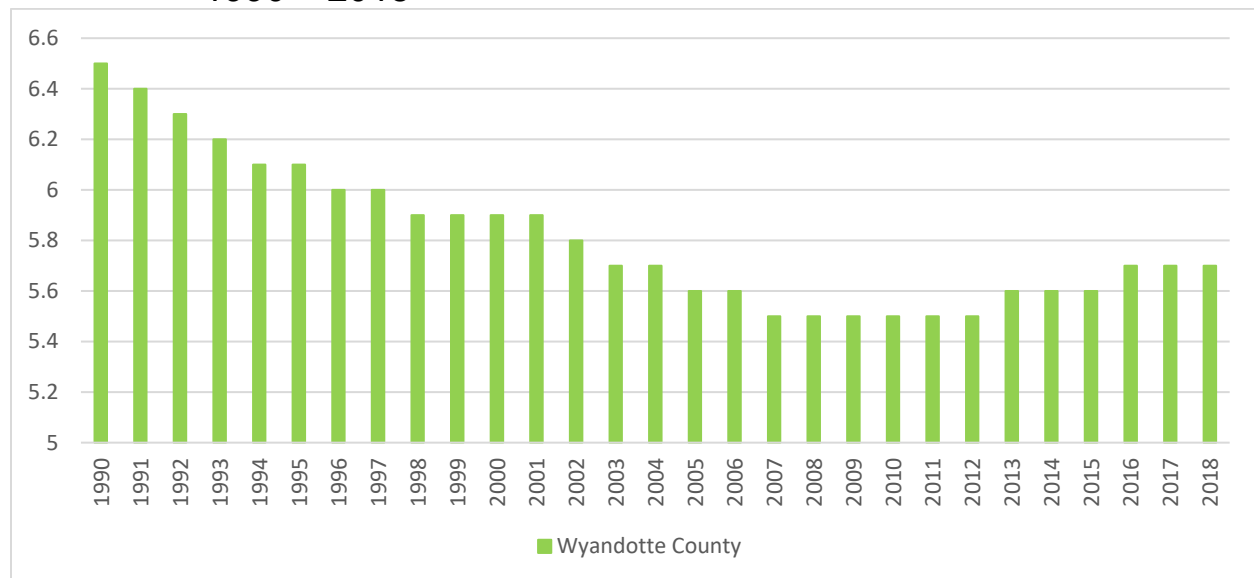
Source: U.S. Census Bureau

**Graph 14: Wyandotte County Estimated Population, 2010 - 2019**



Source: U.S. Census Bureau

Graph 15: Wyandotte County Population as Percent of Kansas Population, 1990 – 2018

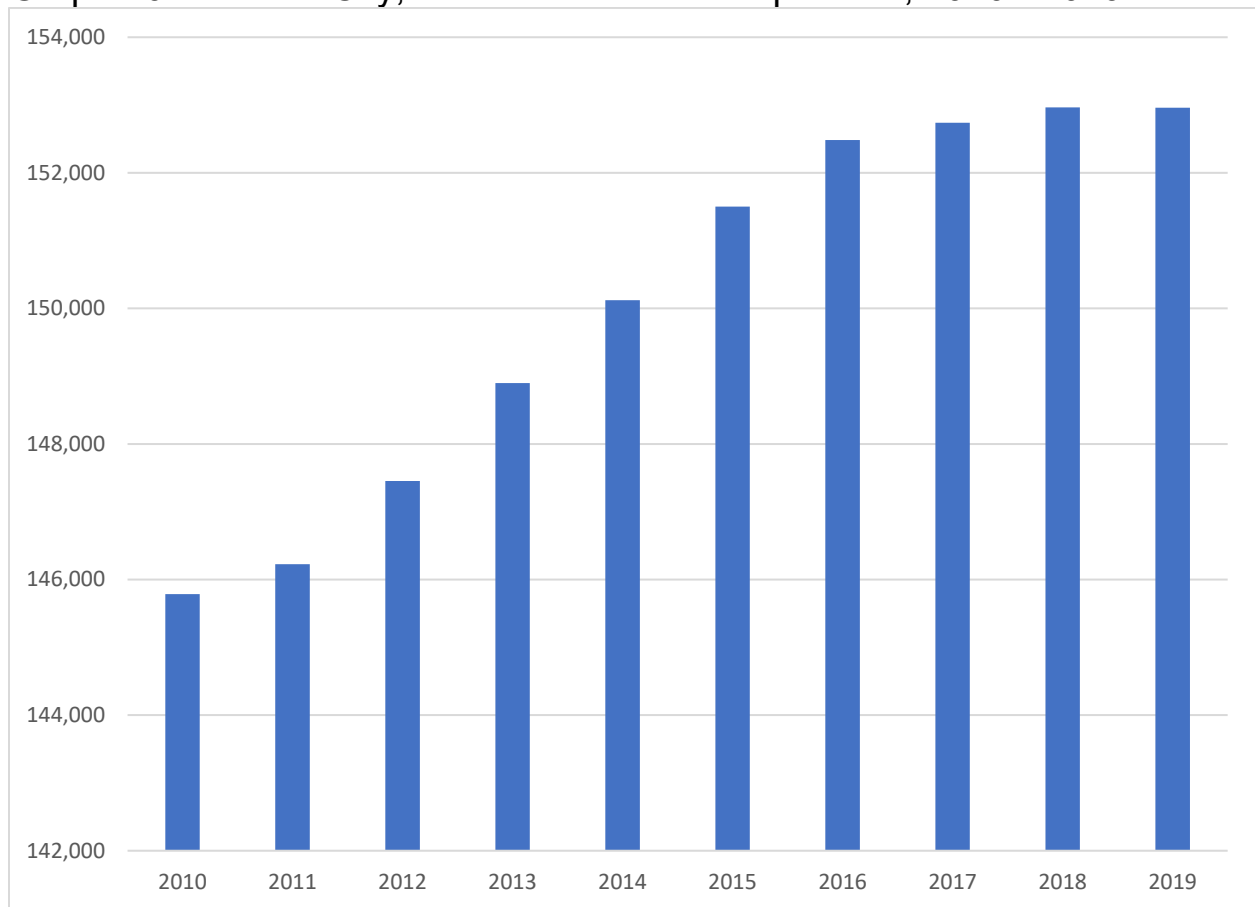


Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

Graph 15 provides an historical view of Wyandotte County's estimated population since 1990 in relation to the Kansas population. Though it gained population every year, Wyandotte County was losing population in a relative sense or not gaining at a rate that equaled the state rate from 1990 to 2008. However, since 2007 there were several plateaus and more recently increases in relative population levels. This reinforces that economic change does happen, but it does not happen overnight.



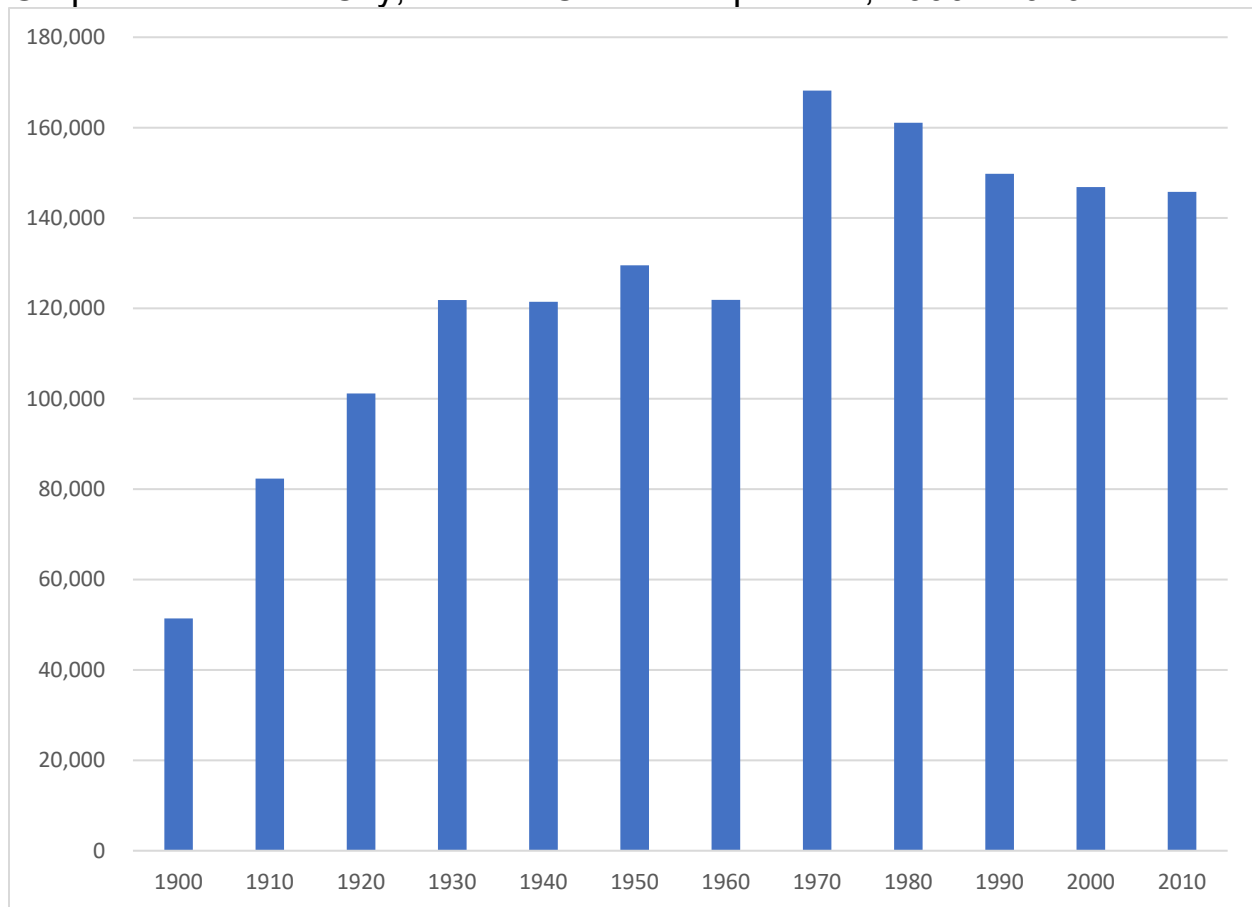
Graph 16: Kansas City, Kansas Estimated Population, 2010 - 2019



Source: U.S. Census Bureau

Graph 16 which matches the shape of Graph 13 better than the shape of Graph 14 suggests that the recent growth of population in Wyandotte County is outside of its major city.

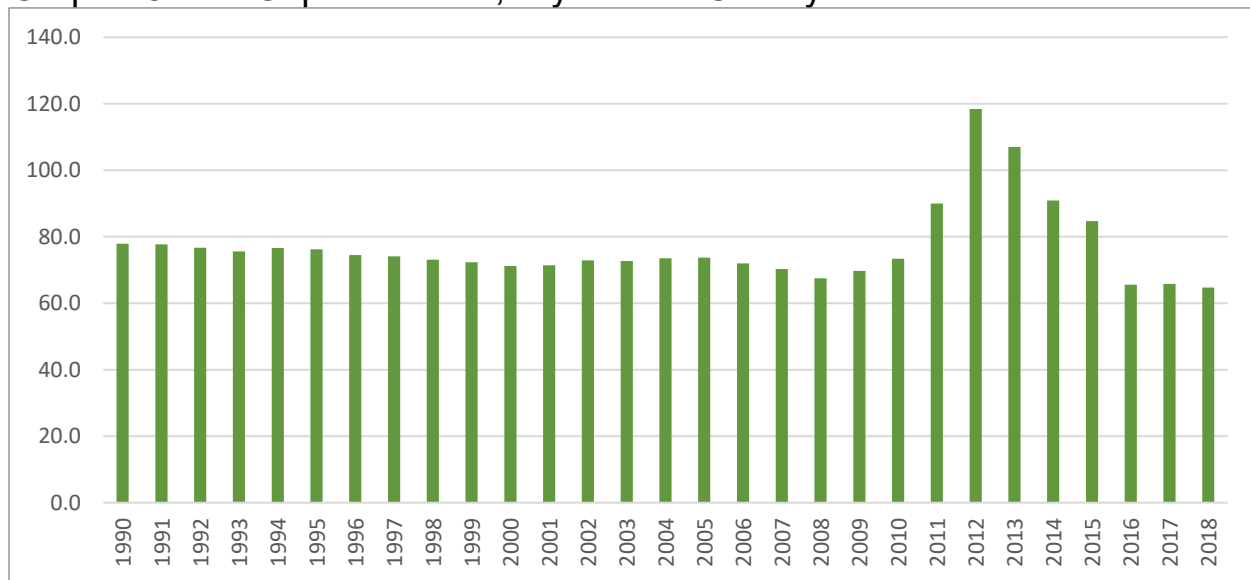
Graph 17: Kansas City, Kansas Census Population, 1900 - 2010



Source: U.S. Census Bureau, Decennial Census, 1900-2010.

Graph 17 suggests the decline in population for Kansas City, Kansas, has been happening for almost half a century. This indirect evidence of increased population and economic activity in the formerly rural parts of Wyandotte County provide support for the efficacy of their STAR Bond projects.

Graph 18: Per Capita Income, Wyandotte County as Percent of Kansas



Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

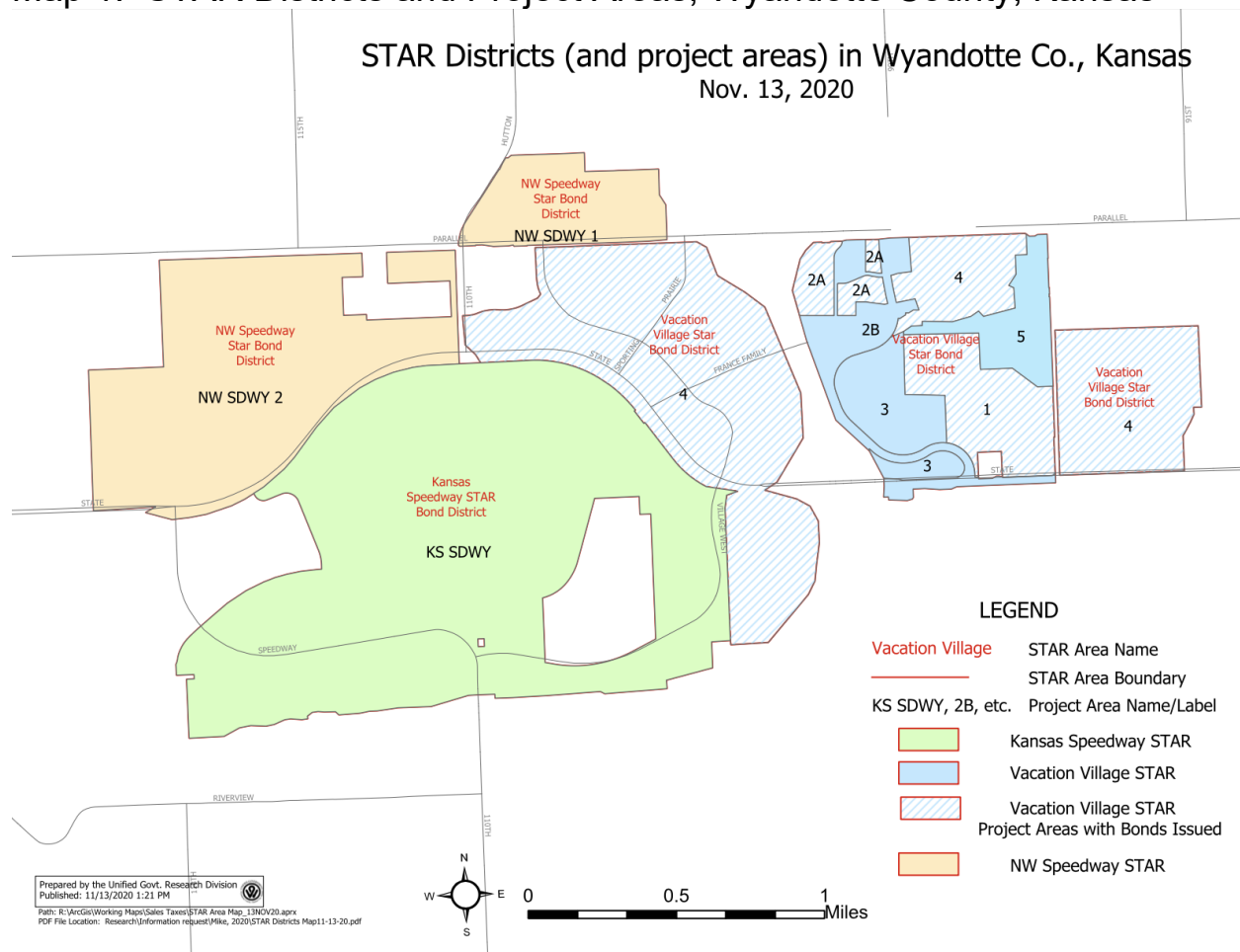
Graph 18 shows that the per capita income in Wyandotte County is generally between 65 and 78 percent of the per capita income in Kansas, however starting in 2009 there are several years where Wyandotte County's per capita income rises. The factors behind this anomaly are outside the parameters of this current study.

In summary Wyandotte County has historically had both a declining population from 1970 through 2010 and its per capita income has been lower than the State average, with the exception of years 2012 and 2013.

## WUG STAR Bond Districts

Map 1 shows the boundaries of the various STAR Bond projects that have been undertaken by the Wyandotte Unified Government. These projects are all in close proximity to each other. Those on the east are separated from the western areas by an interstate highway (I-435).

Map 1: STAR Districts and Project Areas, Wyandotte County, Kansas

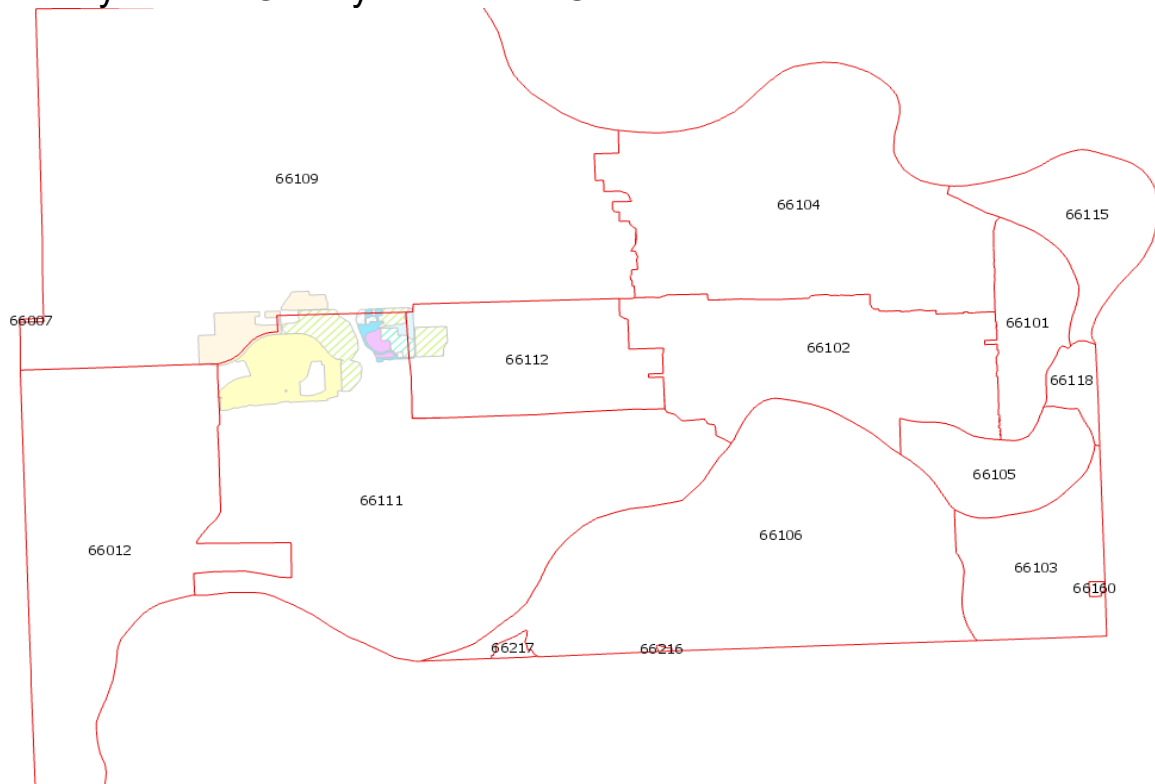


Source: Wyandotte Unified Government, Research Division

Map 2 shows these areas overlaid on a map of the postal ZIP codes for Wyandotte County. The primary ZIP code for this study is 66111 and the

secondary ZIP codes are 66109 to the north and 66112 to the east. Postal ZIP codes are used by the Kansas Department of Labor and we were able to extract data from them down to the ZIP code level for this report.

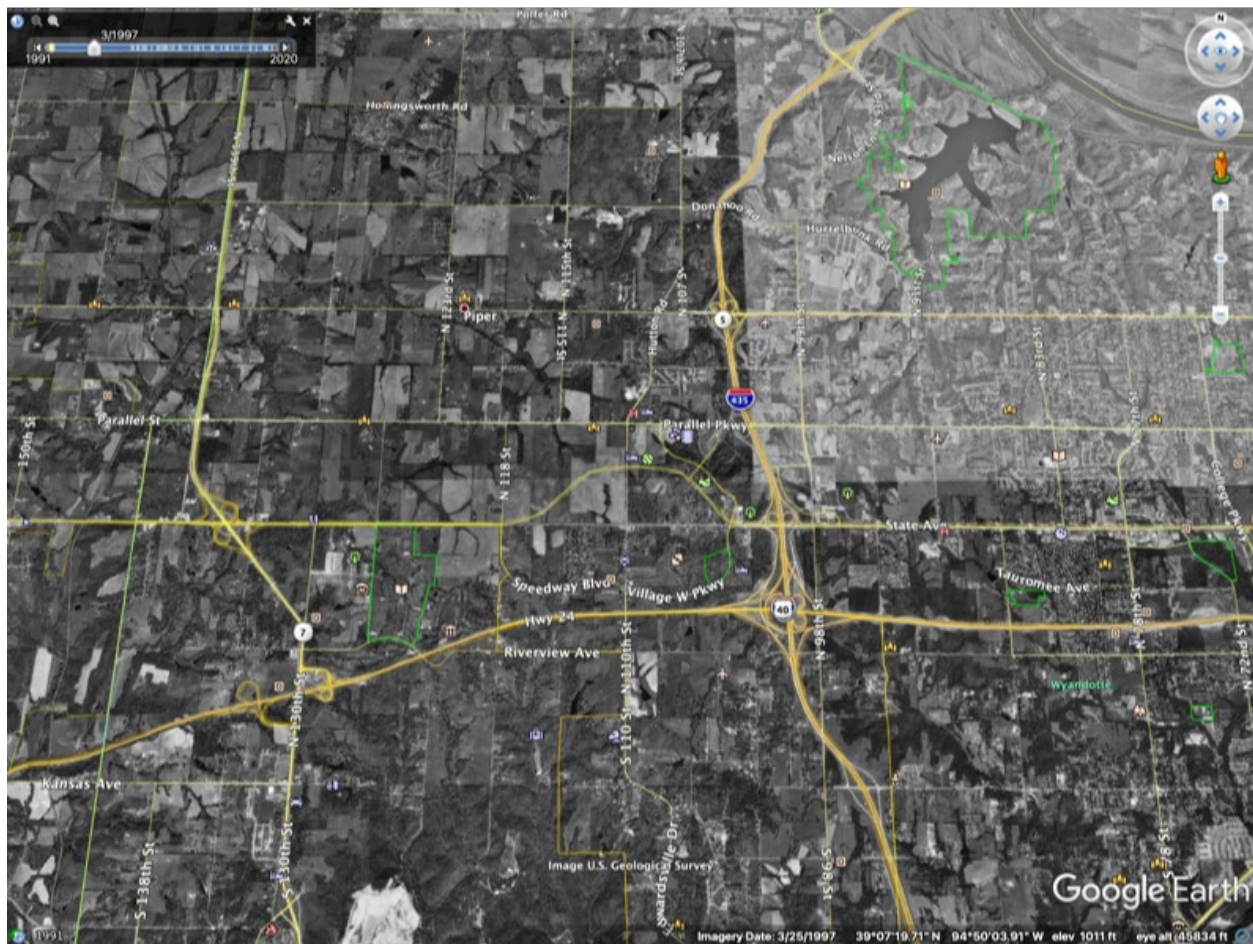
Map 2: Wyandotte County Postal ZIP Code Areas



Source: Wyandotte Unified Government

Map 3 provides an aerial view of northwestern Wyandotte County before STAR Bonds existed. The photograph was taken by the U.S. Geological Survey for unknown reasons and was retrieved from Google Earth. There is little evidence of commercial activity and most of the land seems to be used for agricultural purposes.

Map 3: The Area Before STAR Bond districts, 3/25/1997



Source: U.S. Geological Survey, retrieved from Google Earth

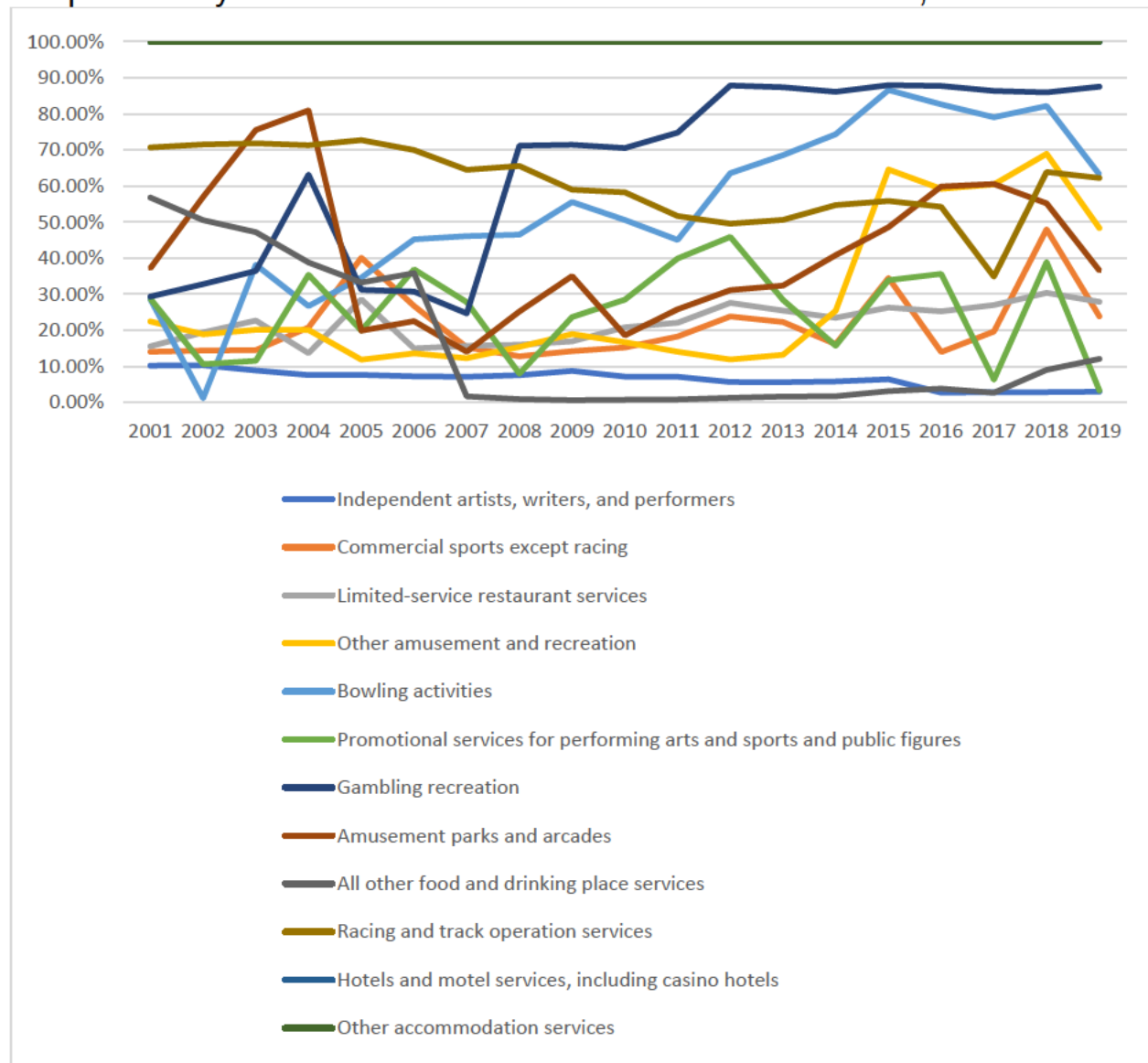
## Wyandotte County Visitor Regional Supply Coefficients

The following Visitor Regional Supply Coefficients (Visitor RSCs) measure the share of selected goods and services that are consumed annually by non-residents of Wyandotte County, Kansas between 2001 and 2019.

This county level data is derived from the Implan economic modelling software and data. As might be expected visitors are the largest consumers of hotels and motel services and other accommodation services. They are also major consumers of racing and track operation services. Given the size of Wyandotte County and its proximity to the Kansas City metropolitan area other traveler services, such as limited service restaurants are also popular.

Visitor RSC Values through time are shown in the Graphs 19 through 21. Tables 14 to 16 shows the Visitor RSC values for 2001 and 2019. The graphs show that although some Visitor RSC values show great changes over the nineteen years of available data, many of the economic sectors are quite stable. Please note, the values for “hotels, motels, including casino hotels” shown in graph 19 are almost identical to “other accommodation services.” They overlap each other. The percentages for all categories are found in table 14.

Graph 19: Wyandotte Visitor RSC Greater Than 10 Percent, 2001



Source: Data from Implan, calculations by the author.

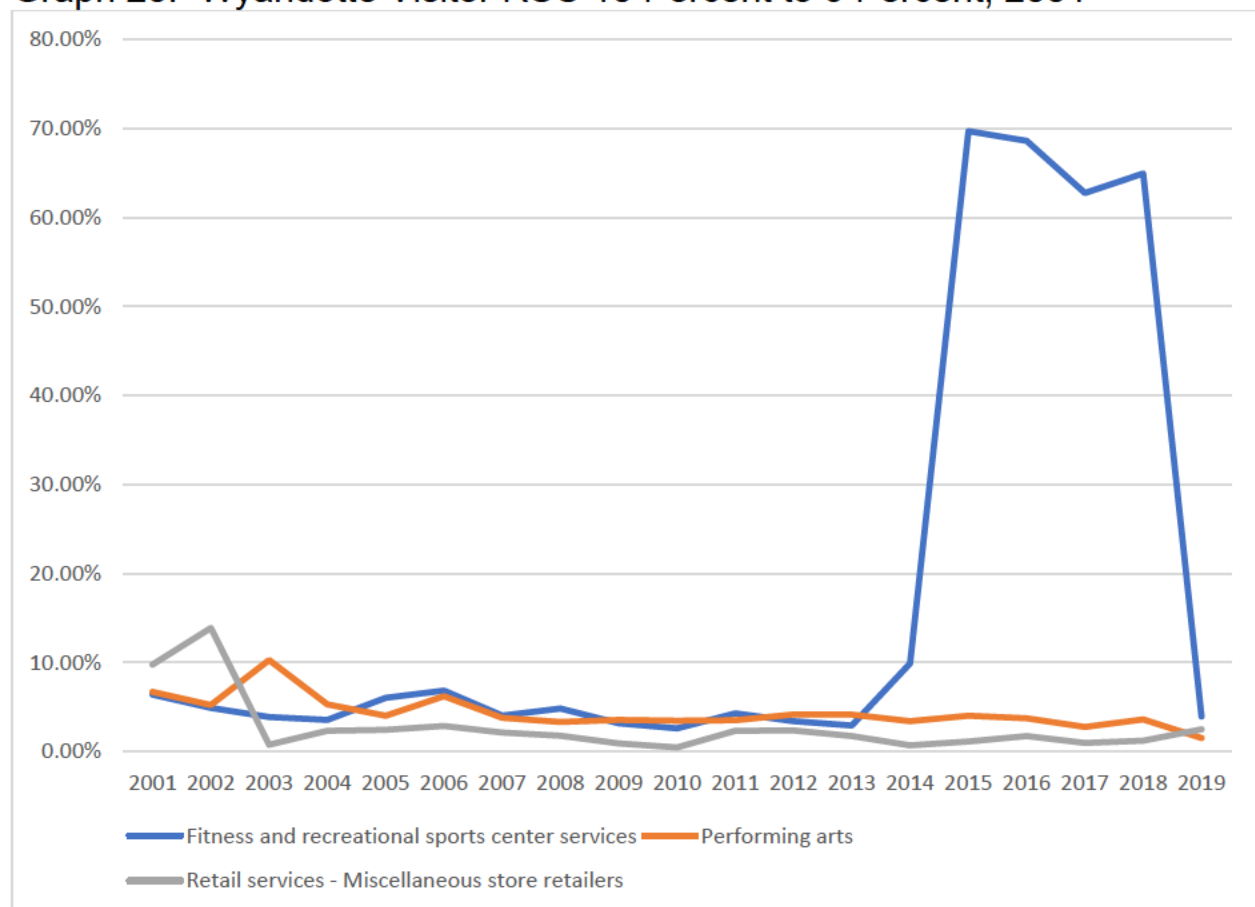


Table 14: Kansas Visitor RSCs, 2001 and 2019

Description	2001	2019
Independent artists, writers, and performers	10.21%	2.99%
Commercial sports except racing	14.04%	23.87%
Limited-service restaurant services	15.55%	27.88%
Other amusement and recreation	22.47%	48.33%
Bowling activities	28.63%	63.18%
Promotional services for performing arts and sports and public figures	28.76%	3.34%
Gambling recreation	29.33%	87.55%
Amusement parks and arcades	37.21%	36.58%
All other food and drinking place services	56.79%	12.06%
Racing and track operation services	70.68%	62.22%
Hotels and motel services, including casino hotels	99.91%	99.92%
Other accommodation services	99.92%	99.93%

Source: Data from Implan, calculations by the author.

Graph 20: Wyandotte Visitor RSC 10 Percent to 5 Percent, 2001



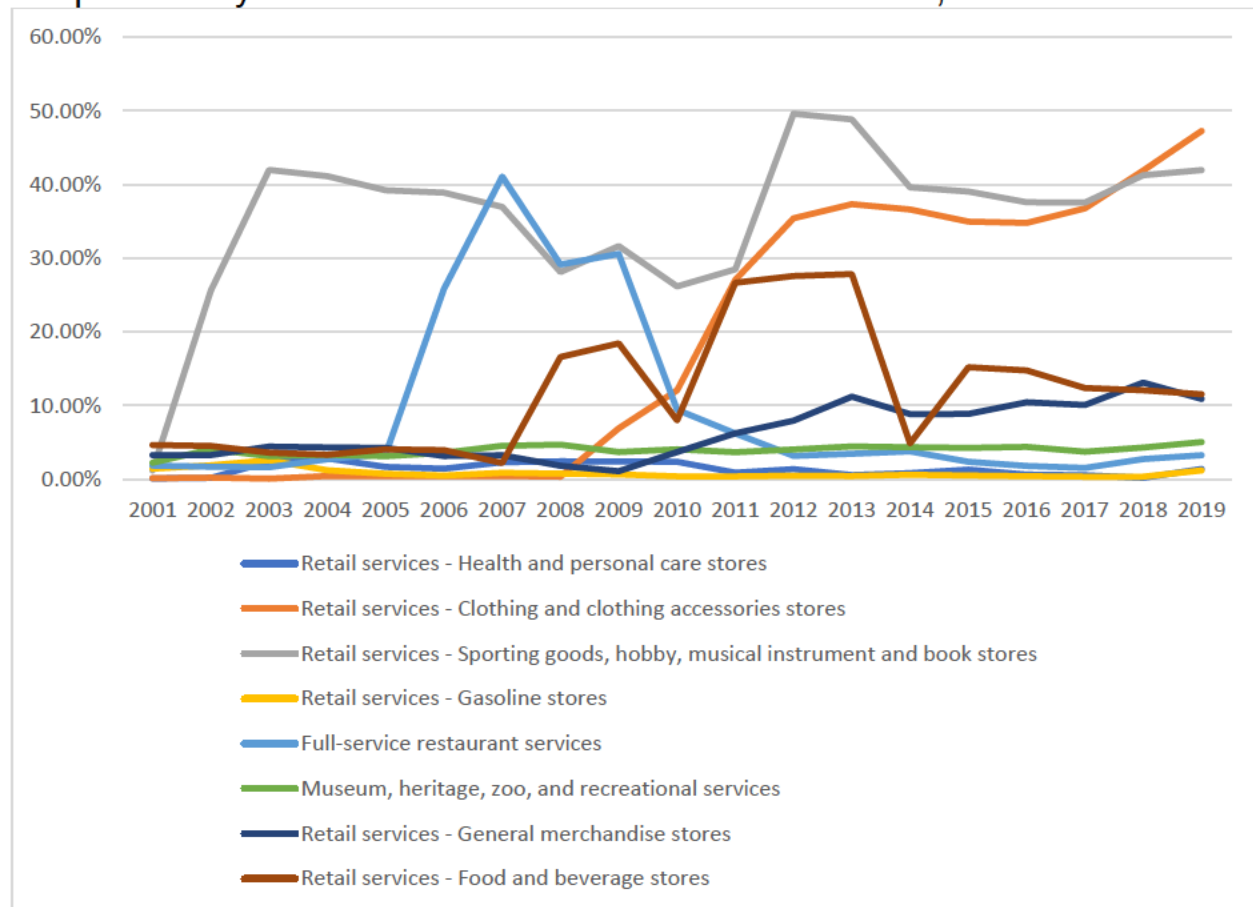
Source: Data from Implan, calculations by the author.

Table 15: Wyandotte Visitor RSCs, 2001 and 2019

Description	2001	2019
Fitness and recreational sports center services	6.38%	3.94%
Performing arts	6.69%	1.51%
Retail services - Miscellaneous store retailers	9.77%	2.48%

Source: Data from Implan, calculations by the author.

Graph 21: Wyandotte Visitor RSC Less Than 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Table 16: Wyandotte Visitor RSCs, 2001 and 2019

Description	2001	2019
Retail services - Health and personal care stores	0.11%	1.39%
Retail services - Clothing and clothing accessories stores	0.14%	47.27%
Retail services - Sporting goods, hobby, musical instrument and book stores	1.20%	41.97%
Retail services - Gasoline stores	1.43%	1.19%
Full-service restaurant services	1.86%	3.26%
Museum, heritage, zoo, and recreational services	2.24%	5.05%
Retail services - General merchandise stores	3.28%	10.90%
Retail services - Food and beverage stores	4.65%	11.54%

Source: Data from Implan, calculations by the author.

Table 17: Wyandotte Visitors' RSCs, 2001 and 2019

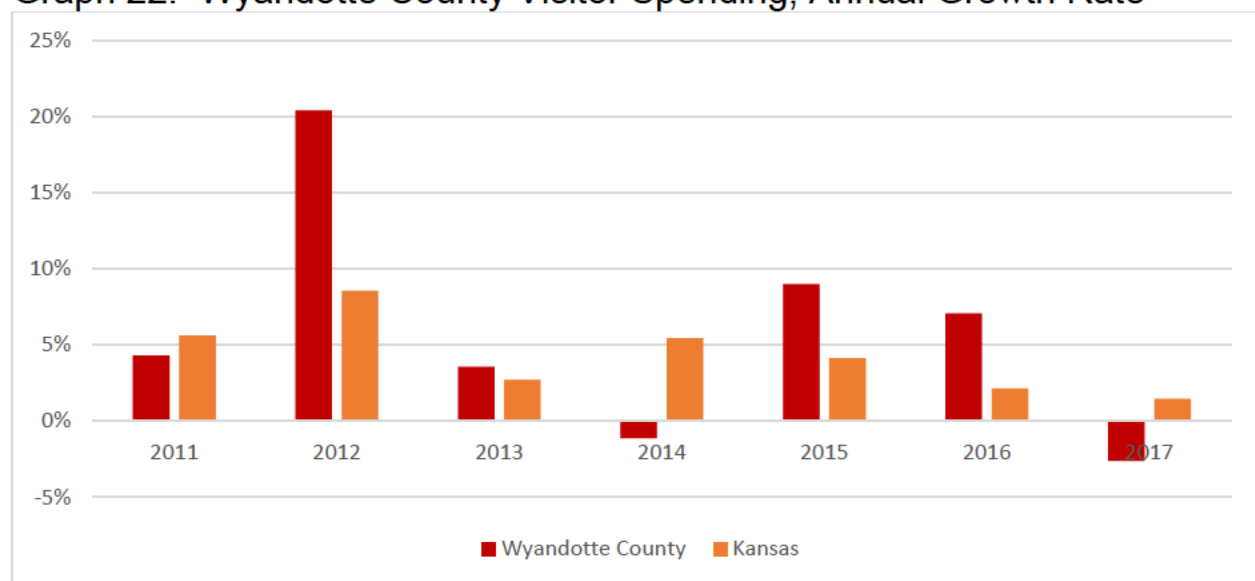
Description	2001	2019
Retail services - Health and personal care stores	0.11%	1.39%
Retail services - Clothing and clothing accessories stores	0.14%	47.27%
Retail services - Sporting goods, hobby, musical instrument and book stores	1.20%	41.97%
Retail services - Gasoline stores	1.43%	1.19%
Full-service restaurant services	1.86%	3.26%
Museum, heritage, zoo, and recreational services	2.24%	5.05%
Retail services - General merchandise stores	3.28%	10.90%
Retail services - Food and beverage stores	4.65%	11.54%
Fitness and recreational sports center services	6.38%	3.94%
Performing arts	6.69%	1.51%
Retail services - Miscellaneous store retailers	9.77%	2.48%
Independent artists, writers, and performers	10.21%	2.99%
Commercial sports except racing	14.04%	23.87%
Limited-service restaurant services	15.55%	27.88%
Other amusement and recreation	22.47%	48.33%
Bowling activities	28.63%	63.18%
Promotional services for performing arts and sports and public figures	28.76%	3.34%
Gambling recreation	29.33%	87.55%
Amusement parks and arcades	37.21%	36.58%
All other food and drinking place services	56.79%	12.06%
Racing and track operation services	70.68%	62.22%
Hotels and motel services, including casino hotels	99.91%	99.92%
Other accommodation services	99.92%	99.93%

Source: Data from Implan, calculations by the author.

## Wyandotte County Tourism

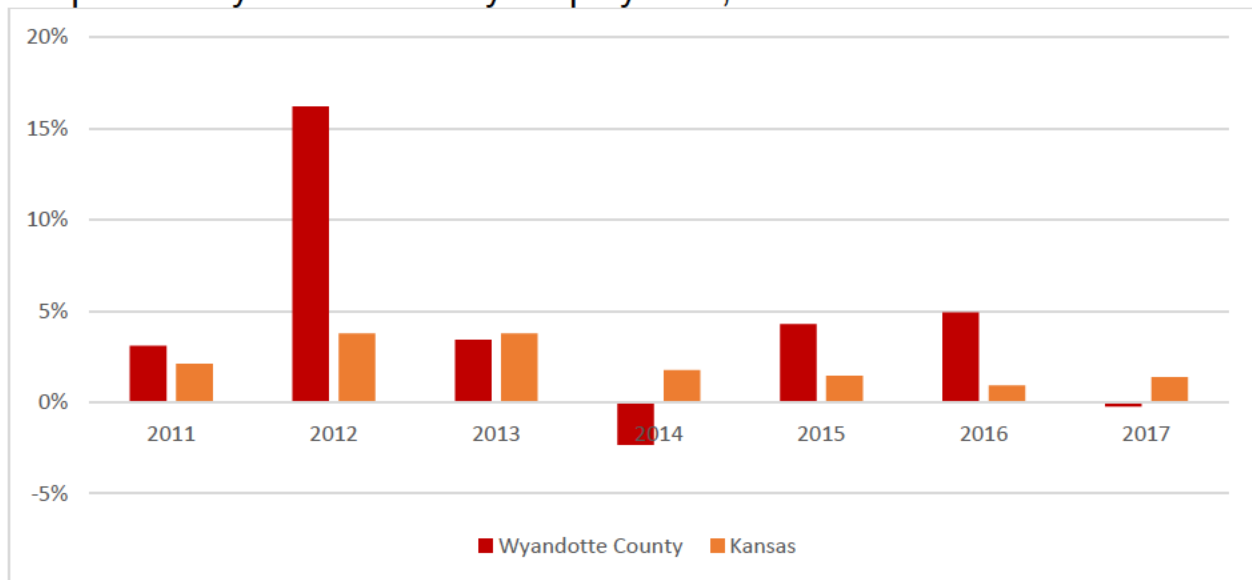
The graphs in this section are derived from data from annual publications of the Kansas Department of Wildlife, Parks, and Tourism and compare Wyandotte County's data with Kansas. The annual growth rate, or annual percentage change, allows direct comparison when there are large differences in the scale of the underlying data values. There is more volatility in the county level data because the state level data incorporates all the counties. This portfolio effect tends to smooth out the state level results.

Graph 22: Wyandotte County Visitor Spending, Annual Growth Rate



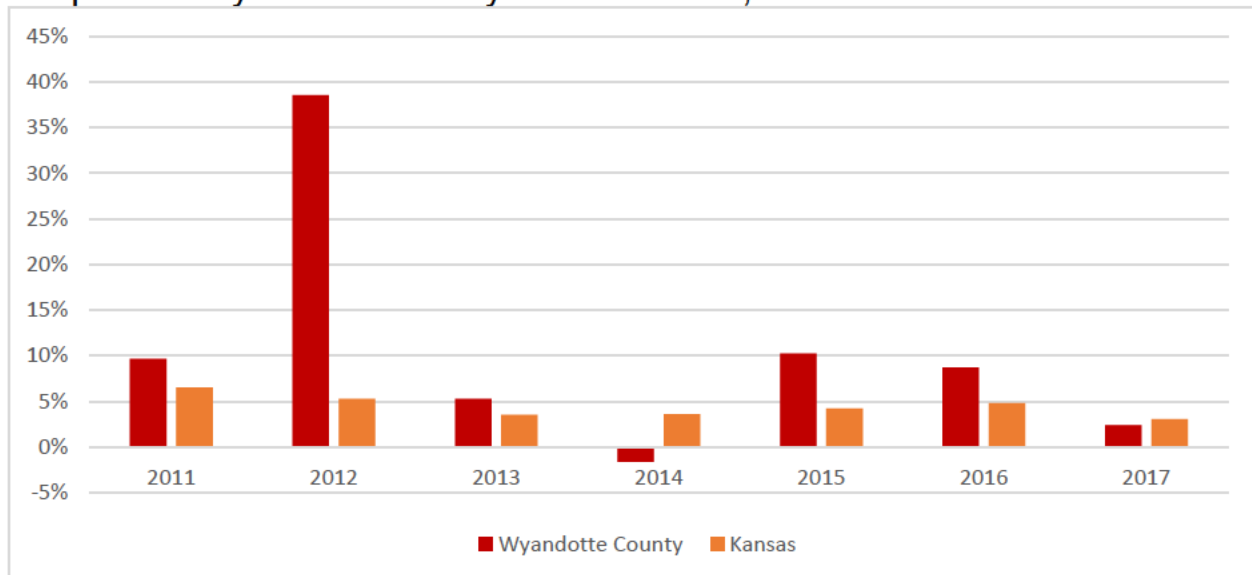
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

Graph 23: Wyandotte County Employment, Annual Growth Rate



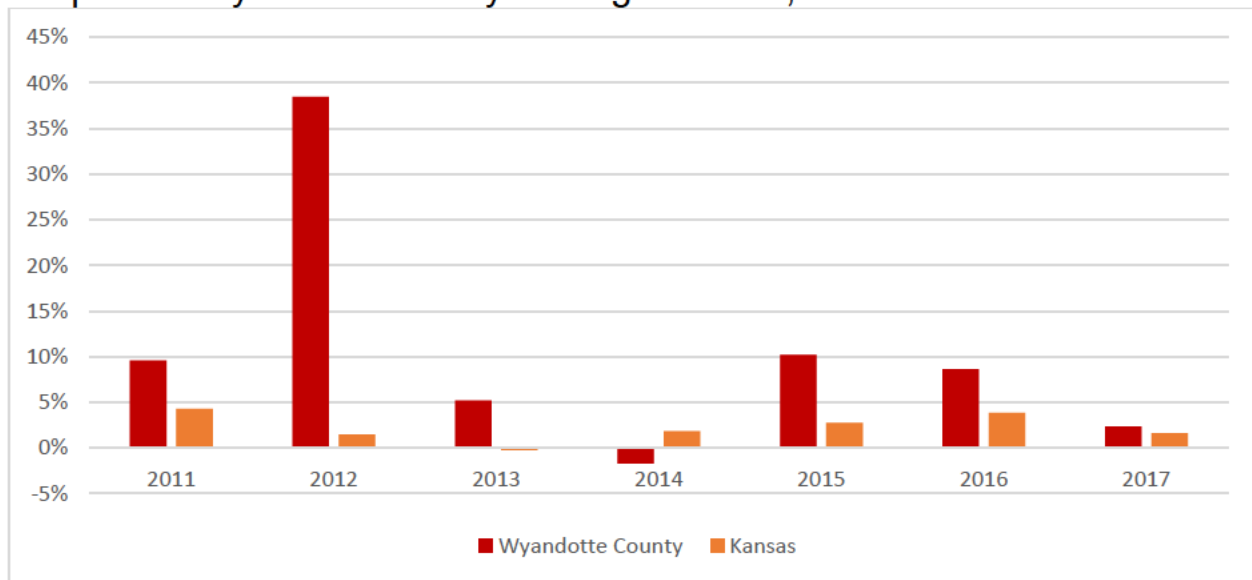
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

Graph 24: Wyandotte County Labor Income, Annual Growth Rate



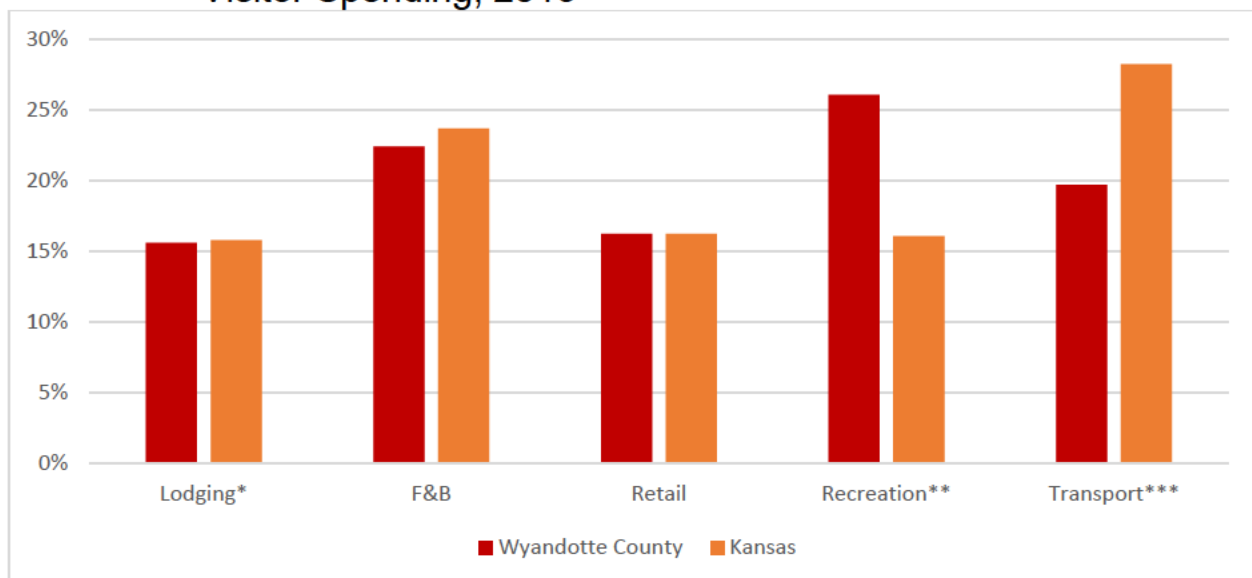
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

Graph 25: Wyandotte County Average Income, Annual Growth Rate



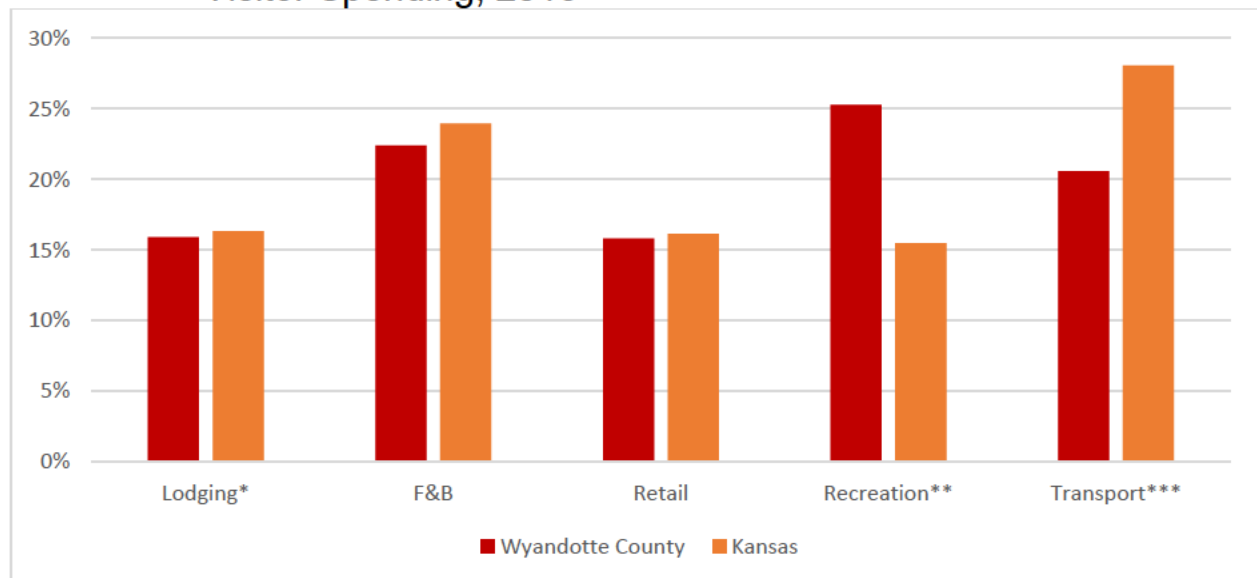
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

Graph 26: Wyandotte County Visitor Spending Category, Percent of Total Visitor Spending, 2013



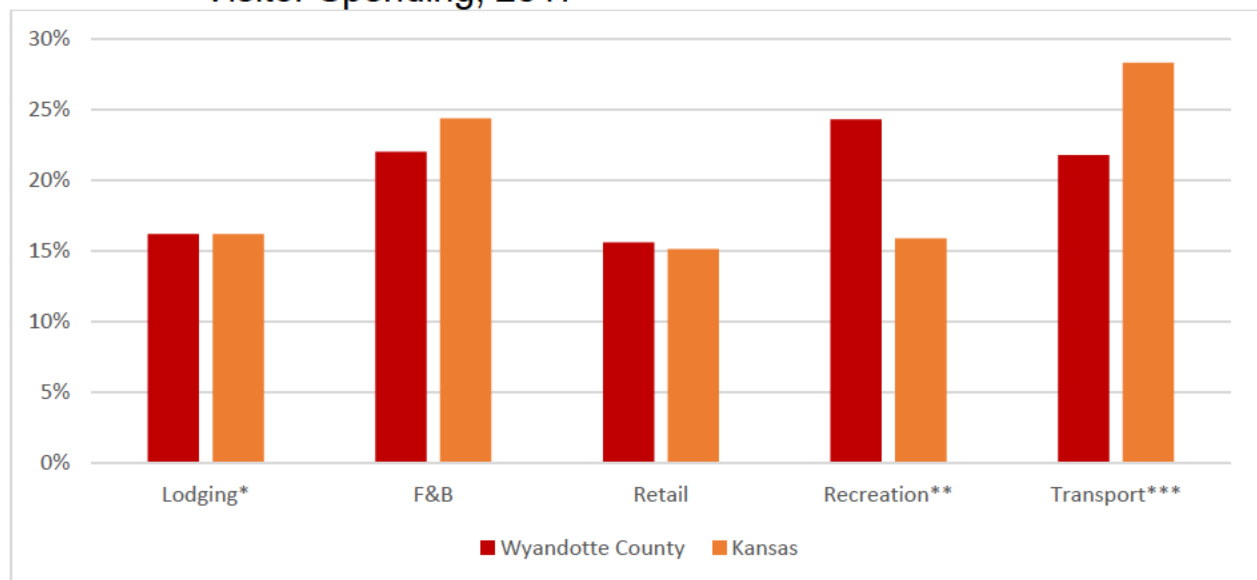
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

**Graph 27: Wyandotte County Visitor Spending Category, Percent of Total Visitor Spending, 2015**



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author

**Graph 28: Wyandotte County Visitor Spending Category, Percent of Total Visitor Spending, 2017**



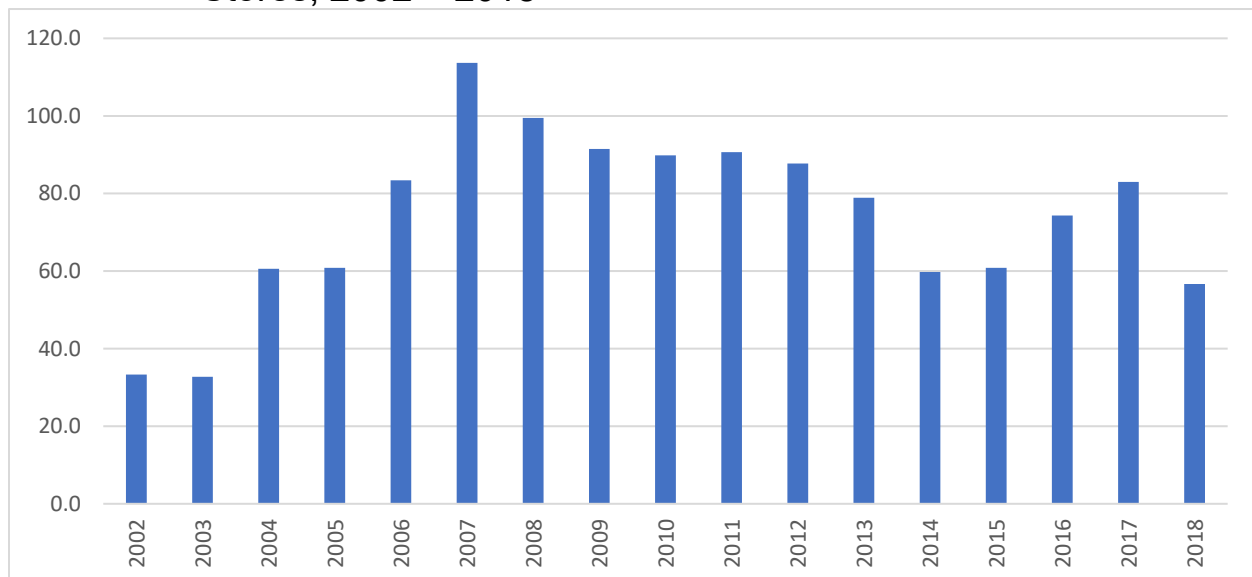
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author



## Labor Data by NAICS and ZIP

The charts in this section show the average annual number of employees, average wage, and total wages by three-digit NAICS code and ZIP code for all businesses within the code category that were doing business in each ZIP code. The underlying data is collected on a monthly basis for each quarter of the year.

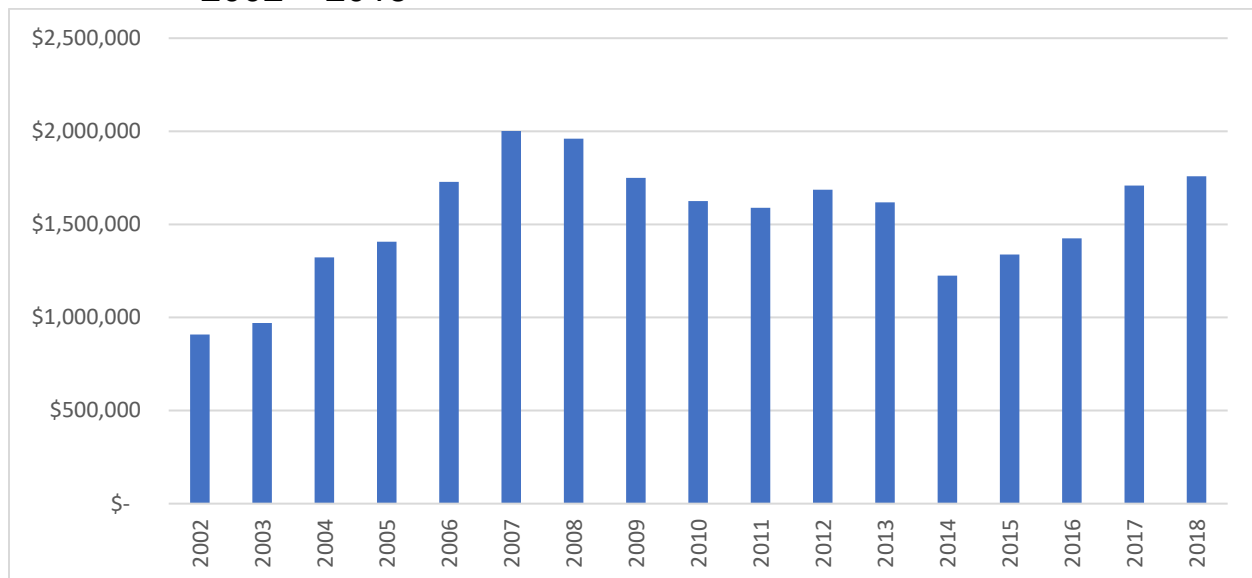
Graph 29: ZIP 66111, Average Number of Employees, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 29 shows the increase in the average number of employees in food and beverage stores for this time interval and ZIP code, and the variability that occurs over time.

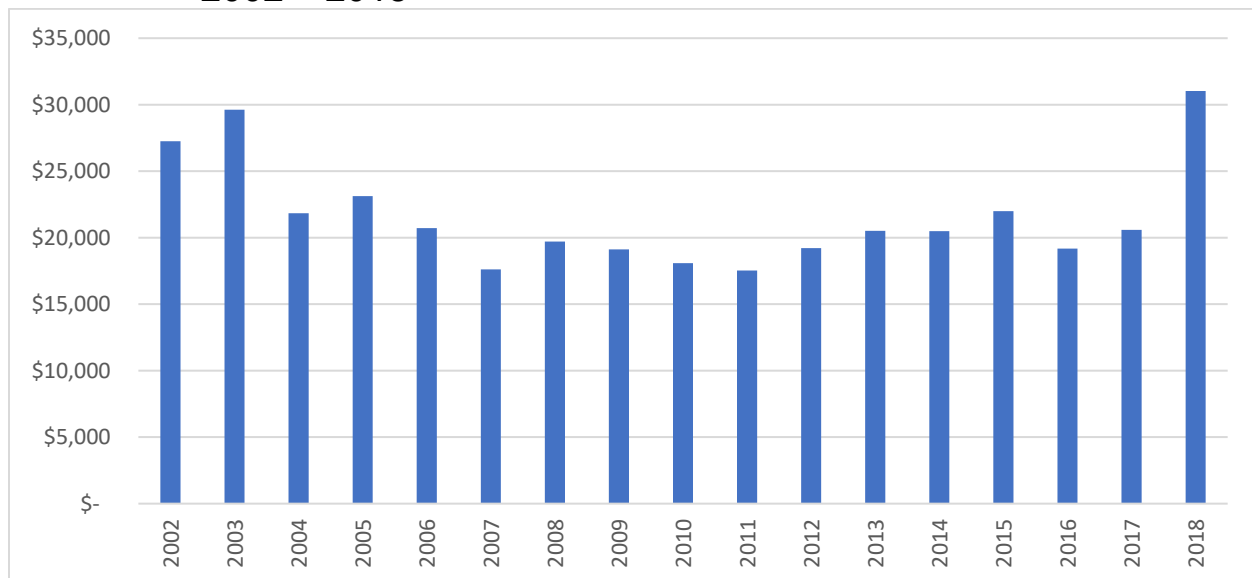
Graph 30: 66111, Total Wages of Employees, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 30 shows a similar cyclical pattern suggesting that changes in the number of employees determines the total wages of businesses in this sector of the economy.

Graph 31: 66111, Average Wage of Employees, Food & Beverage Stores, 2002 – 2018

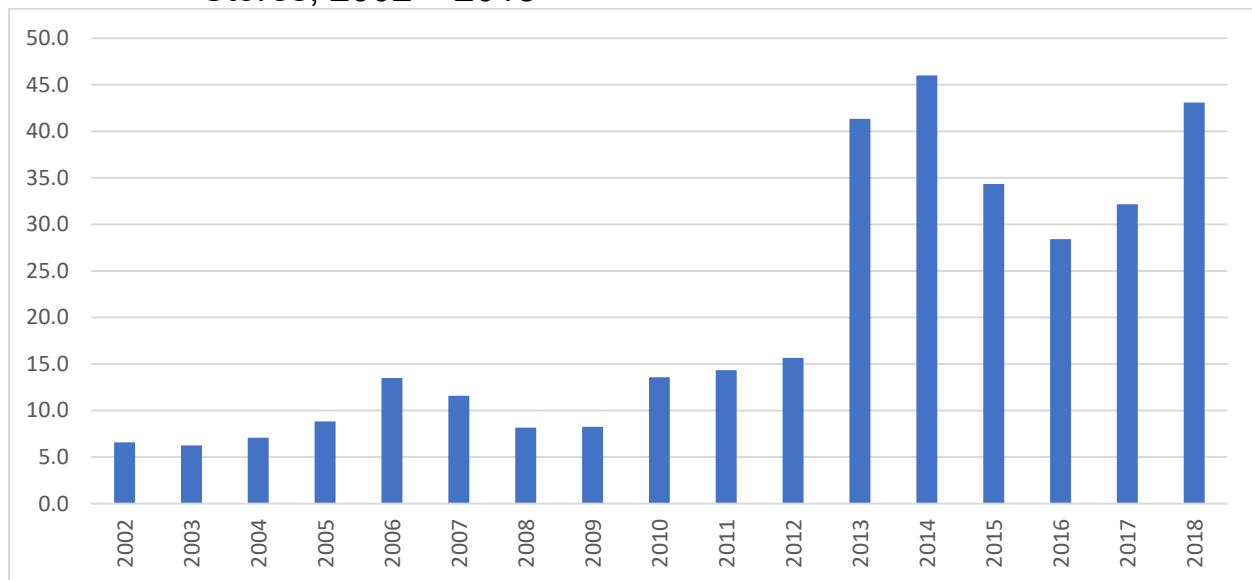


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 31 shows that the average wage level is more stable over time for this industry.

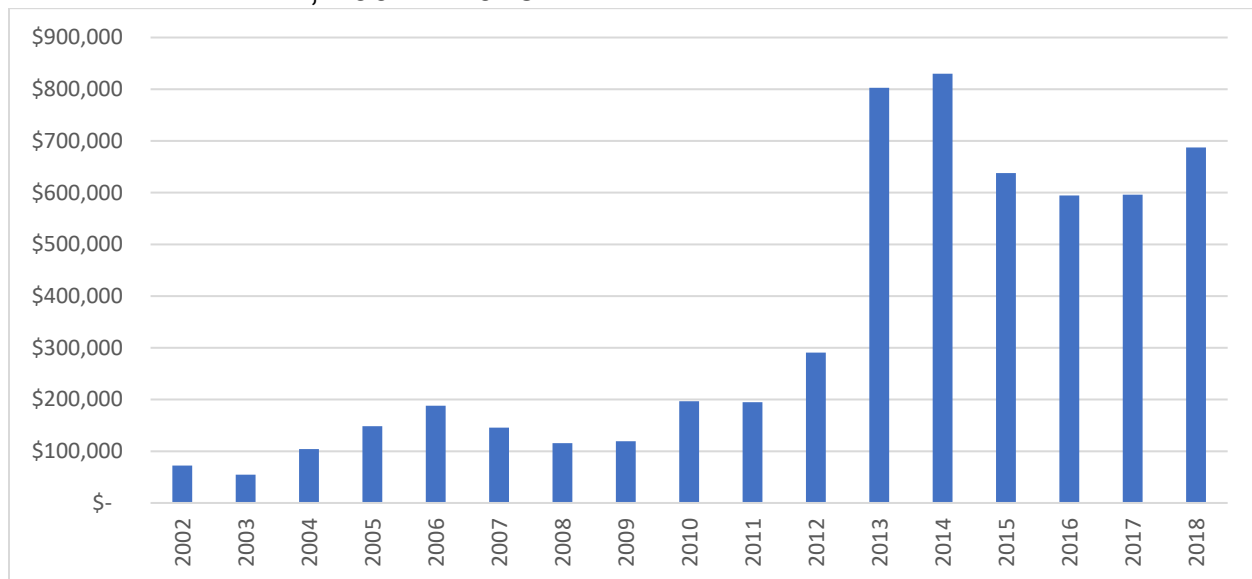
Graph 32 shows that growth in ZIP code 66109 which is north of the main STAR Bond projects occurred several years later than in ZIP 66111. Again, change and economic growth take time. And, one success tends to lead to another.

**Graph 32: ZIP 66109, Average Number of Employees, Food & Beverage Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

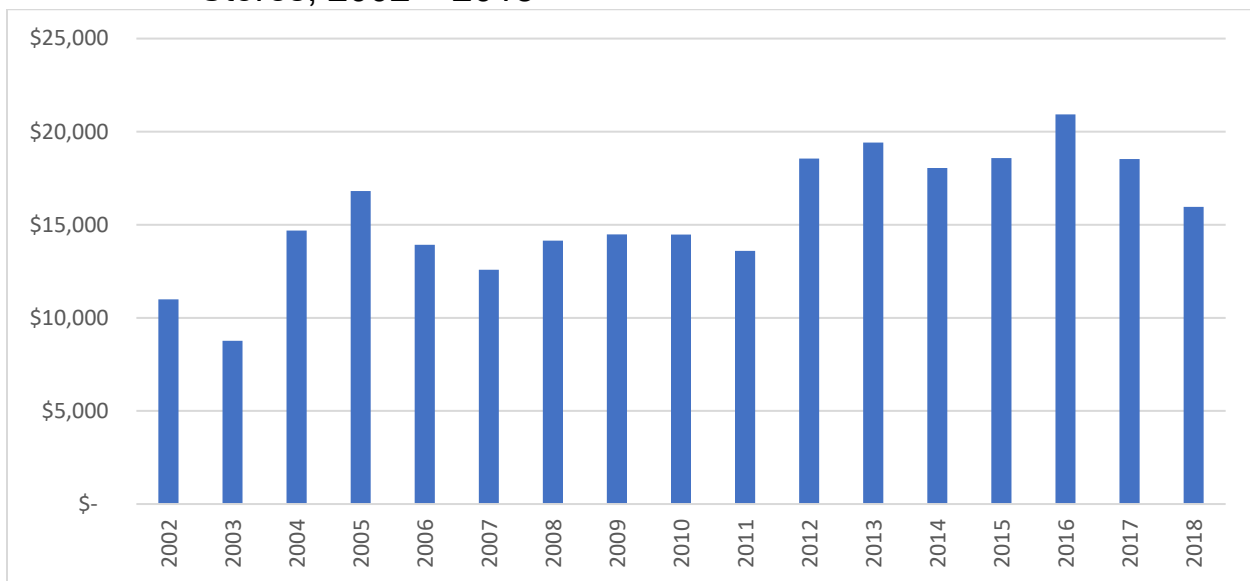
**Graph 33: ZIP 66109, Total Wages of Employees, Food & Beverage Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 33 shows that there was an increase in total wages at food and beverage stores in ZIP code 66109 which might be the indirect result of STAR Bond projects.

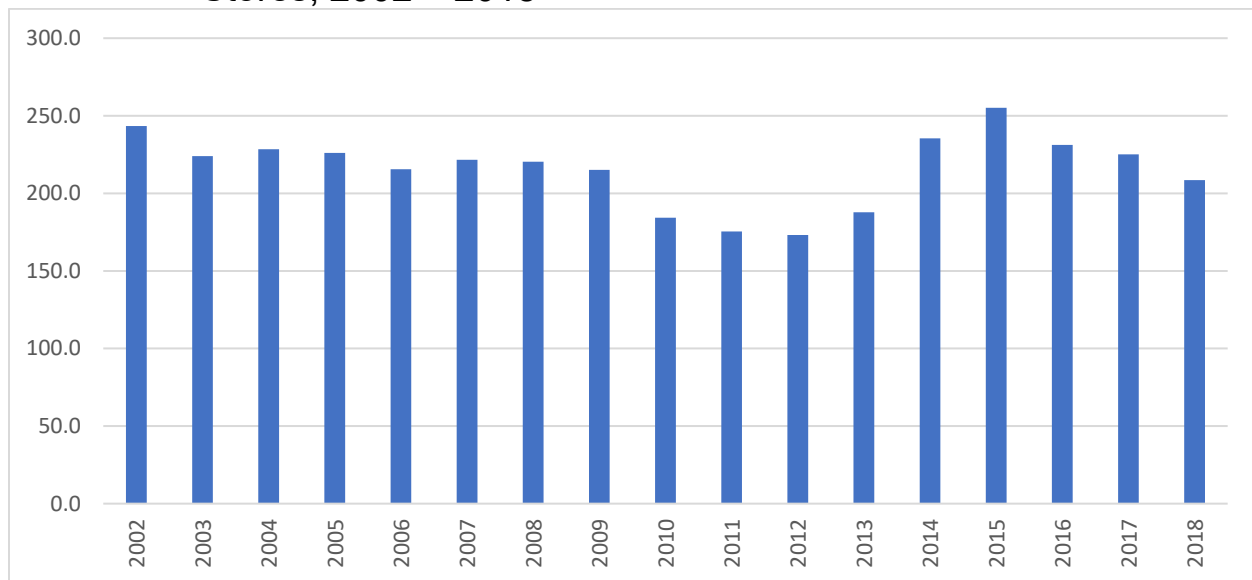
Graph 34: ZIP 66109, Average Wage of Employees, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 34 suggests that an increase in wage levels to a level closer to that in ZIP 66111 was a factor in increasing the number of employees in this economic sector and ZIP code area.

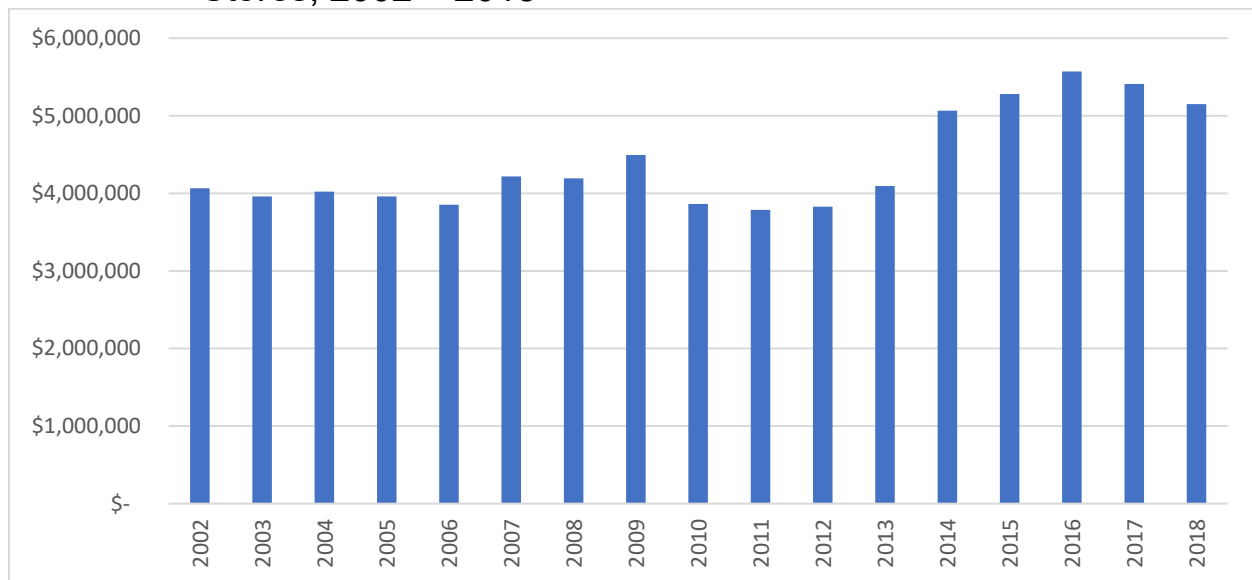
Graph 35: ZIP 66112, Average Number of Employees, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 35 shows that for ZIP code 66112 which is to the east of the STAR Bond projects and is closer to the urban center of the Kansas City MSA there are substantially more employees of food and beverage stores. This implies either more stores, or bigger stores, or both. Also of note is that the larger number of employees shows less variation from year to year.

Graph 36: ZIP 66112, Total Wages of Employees, Food & Beverage Stores, 2002 – 2018

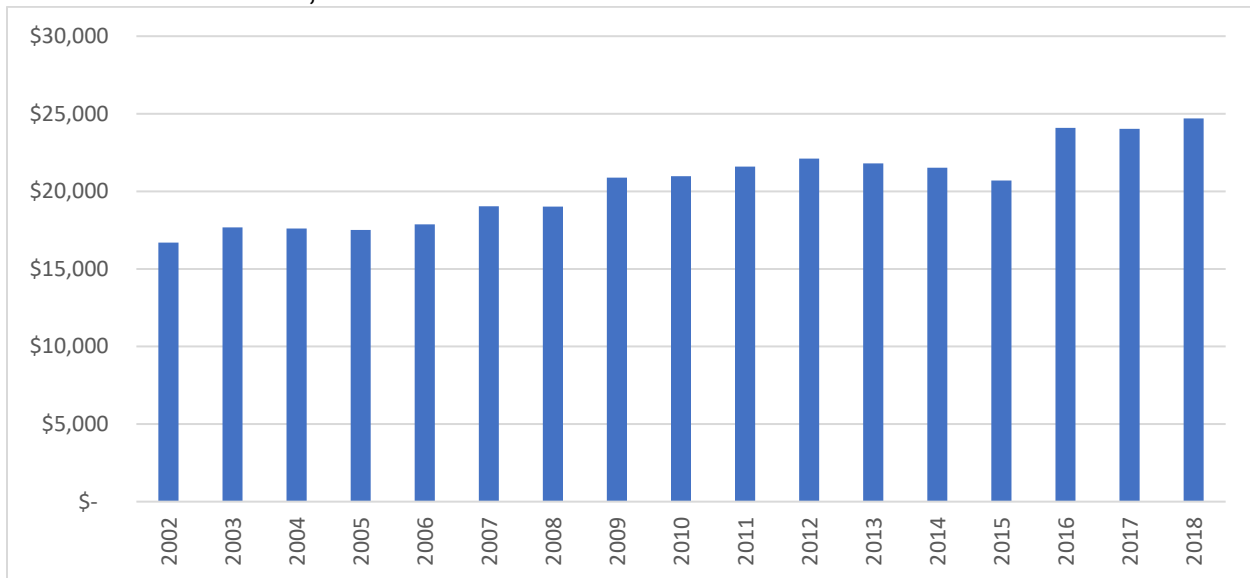


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 36 follows the pattern that changes in total wages is in large part determined by changes in number of employees.

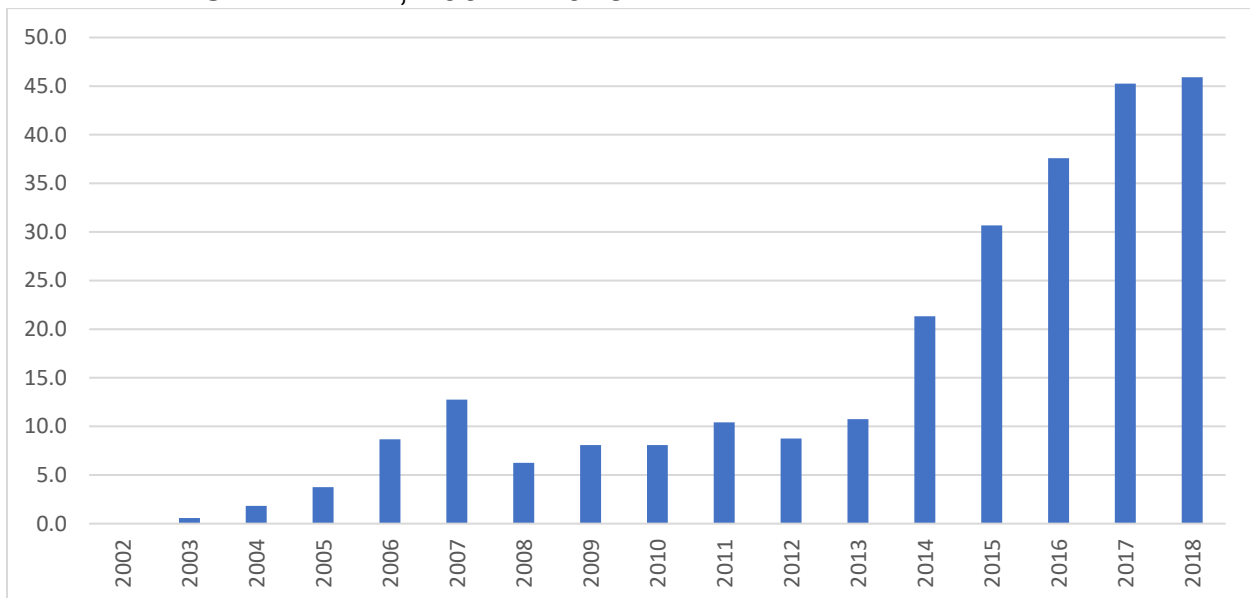
Graph 37 shows that the average wage level is higher in ZIP 66112 than in either of the other two. Graph 37 also shows that the combination of more workers and a higher average wage leads to substantially higher total wages.

**Graph 37: ZIP 66112, Average Wage of Employees, Food & Beverage Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 38: ZIP 66111, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018**



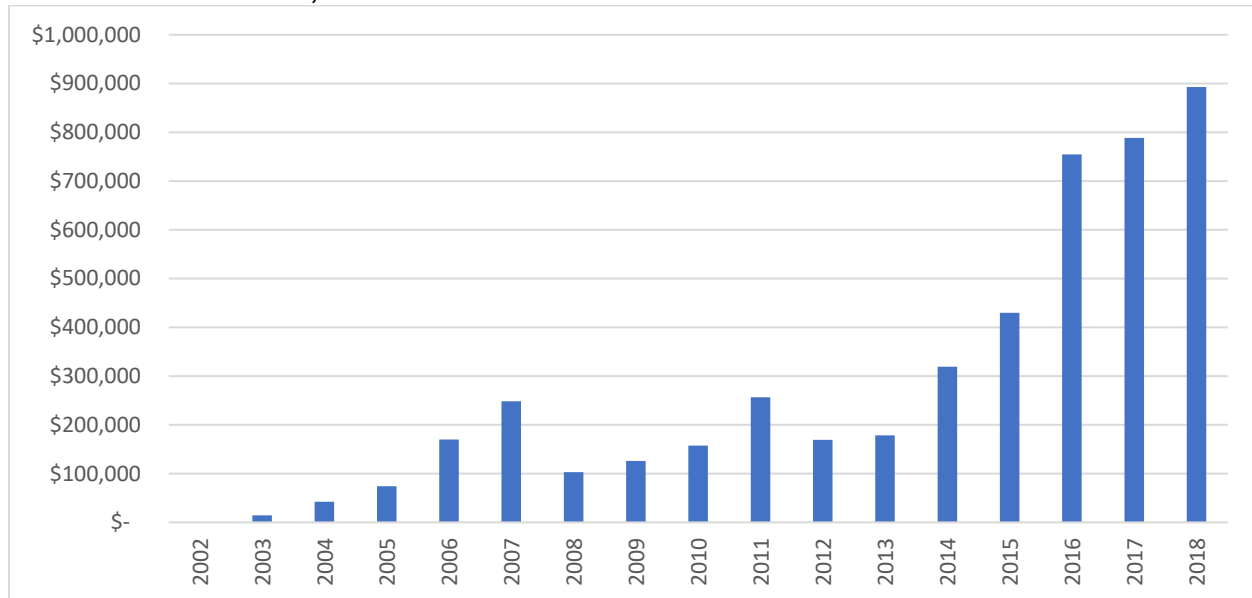
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 38 suggests that 2014 saw new or expanded businesses in the Health and Personal Care sector in ZIP code 66111 starting in 2014. There were no



employees in this sector in 2002, followed by a gradual increase and plateau through 2013. This is a common pattern for economic growth.

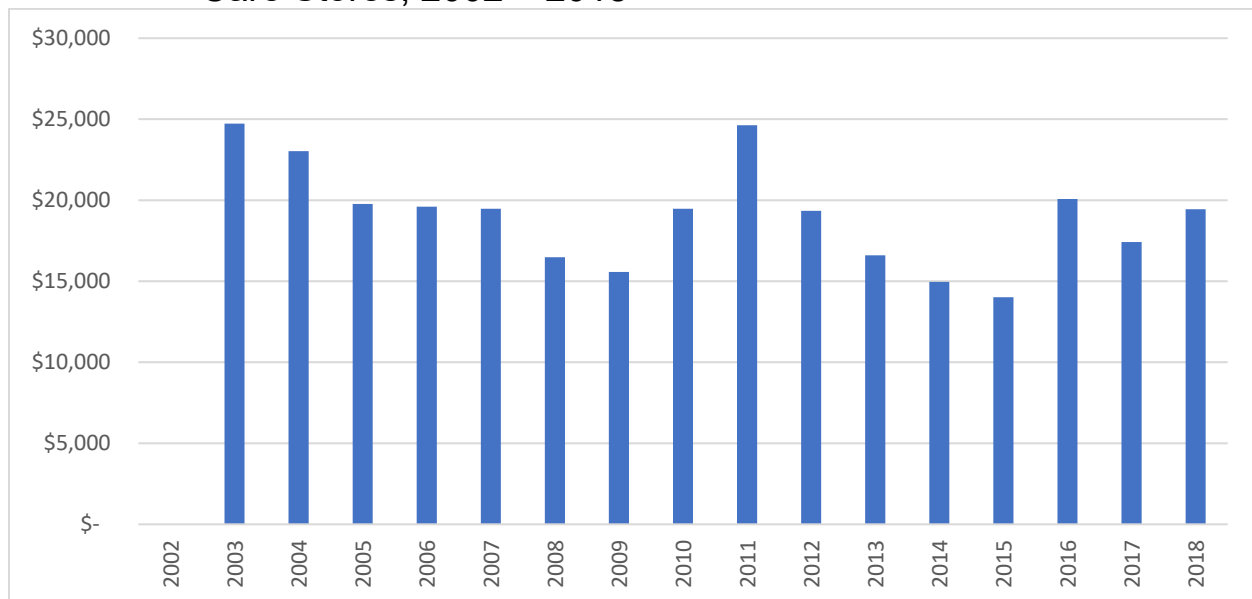
Graph 39: ZIP 66111, Total Wages of Employees, Health & Personal Care Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 39, Total Wages, mirrors the shape of Graph 38. There were zero dollars of wage income in 2002 and by 2018 wage income had risen to almost \$900,000. These are new dollars available for spending.

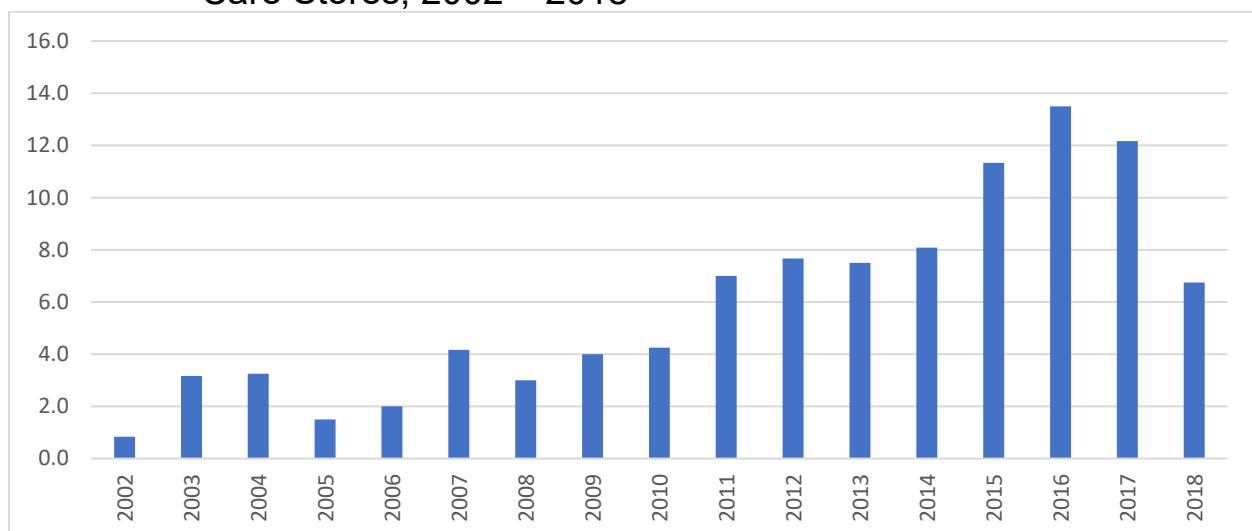
**Graph 40: ZIP 66111, Average Wage of Employees, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 40 shows that the average wage for health and personal care employees has remained relatively stable in ZIP code 66111 since 2003.

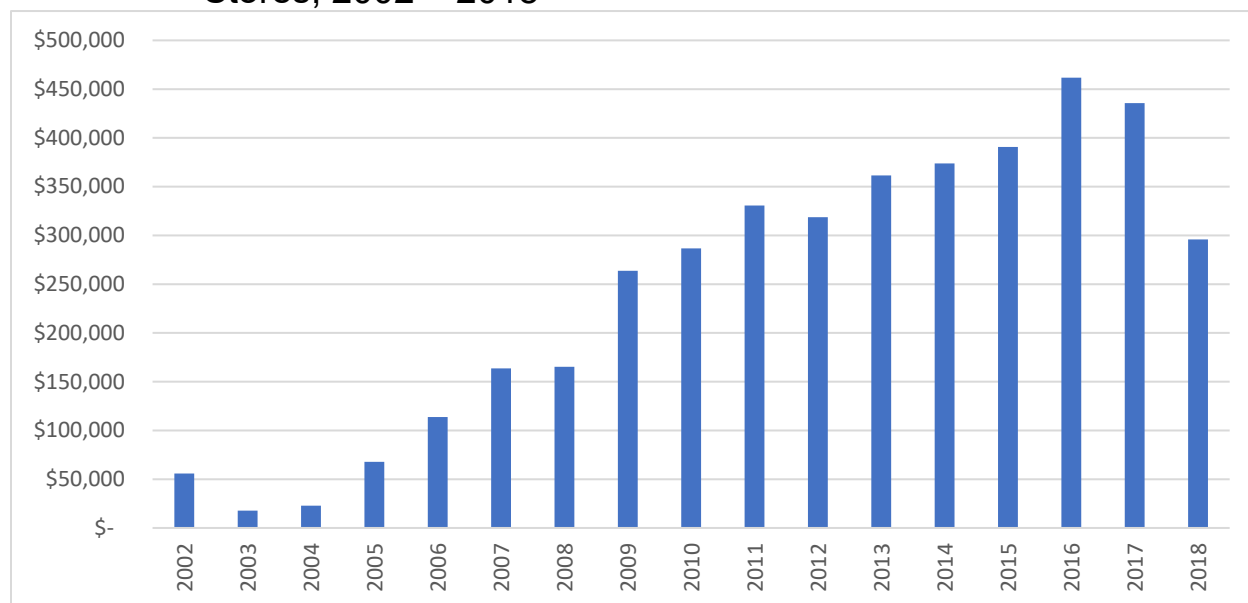
**Graph 41: ZIP 66109, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 41 shows that in ZIP code 66109 there was an increase in the average number of employees of health and personal care stores in 2011 and again in 2015. The scale of change suggests either expansion of an existing store or opening of a new store.

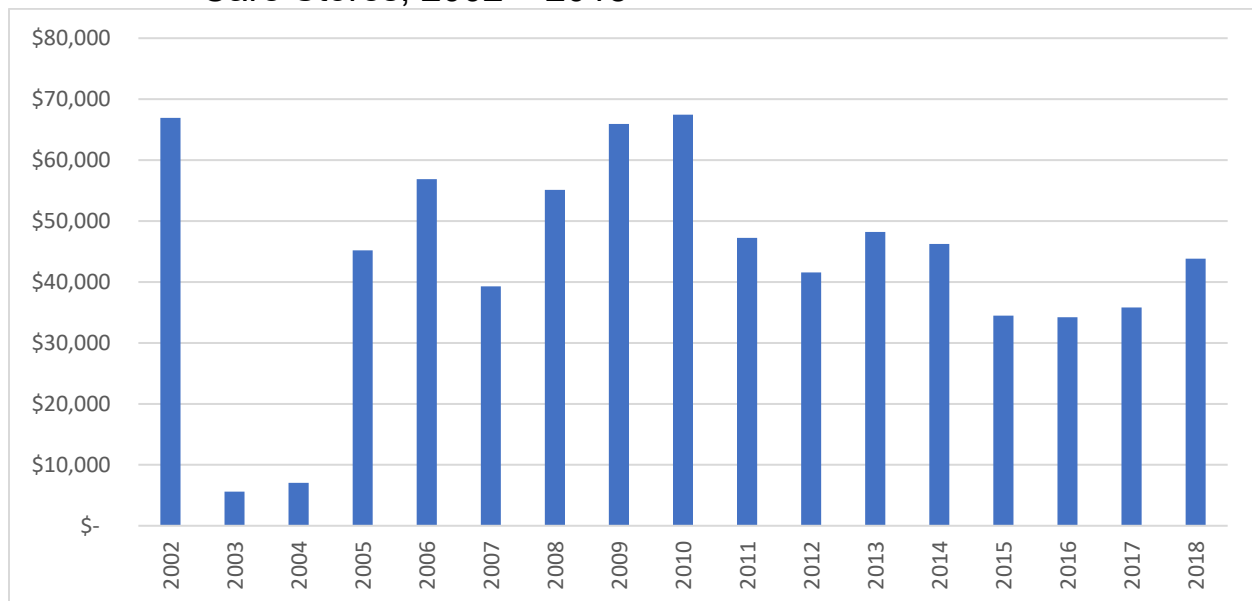
Graph 42: ZIP 66109, Total Wages of Employees, Health & Personal Care Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

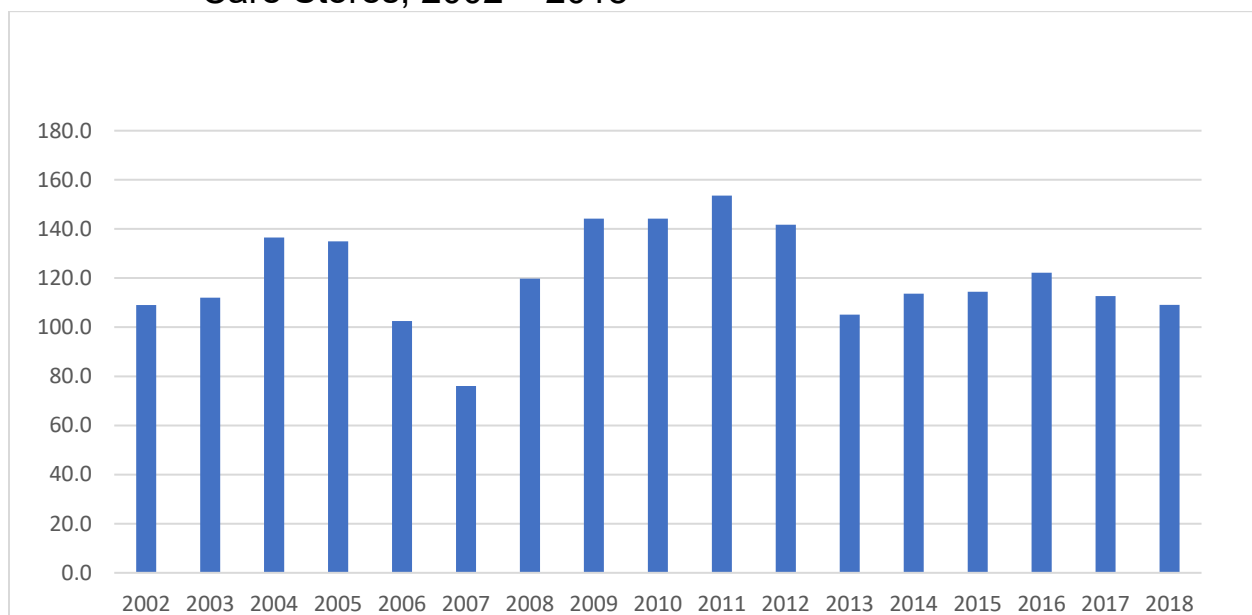
Graph 42 shows a consistent increase in total wages for these employees starting in 2004. Graph 43 shows that the average wage was higher between 2005 and 2014.

**Graph 43: ZIP 66109, Average Wage of Employees, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

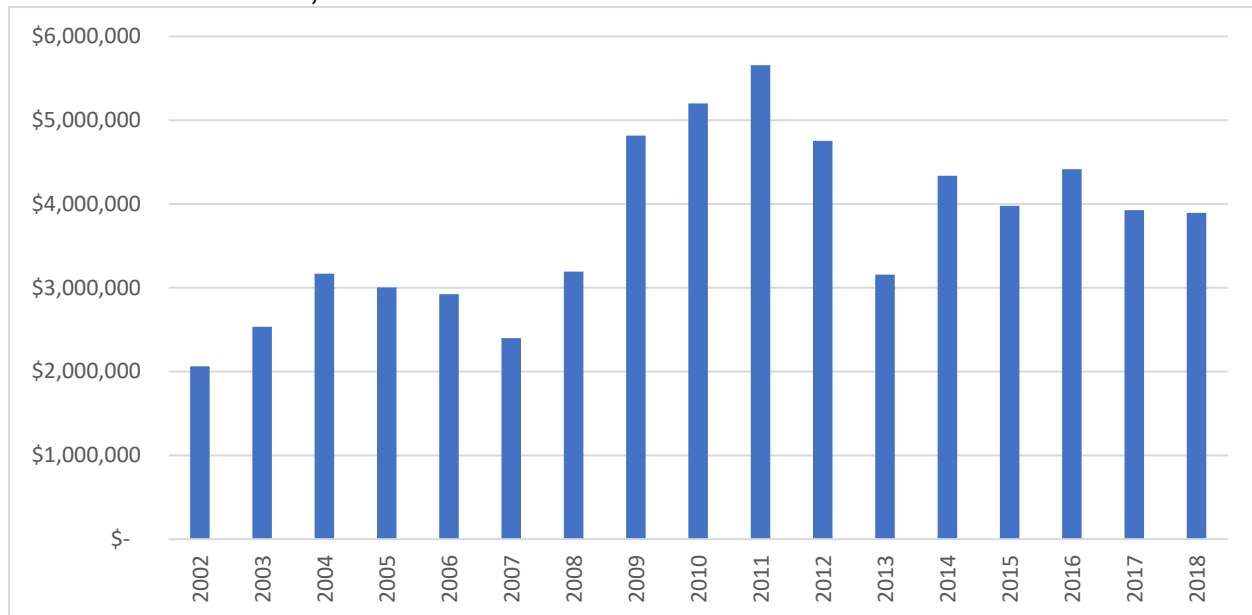
**Graph 44: ZIP 66112, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 44 shows that ZIP code 66112 continues to have more retail opportunities for employment when compared with ZIP codes 66111 and 66109. This suggests that the area in ZIP code 66112 was developed economically earlier than the other two areas.

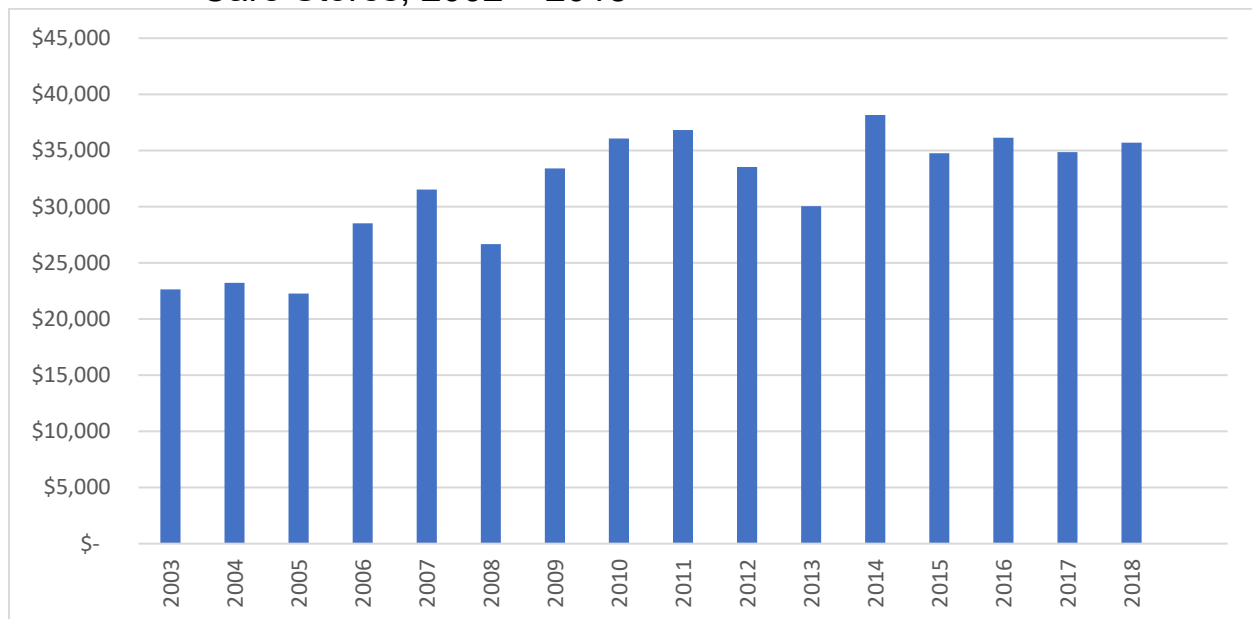
**Graph 45: ZIP 66112, Total Wages of Employees, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 45 shows that total wages for health and personal care stores have three periods of rising and then declining that generally match the times of increased employment.

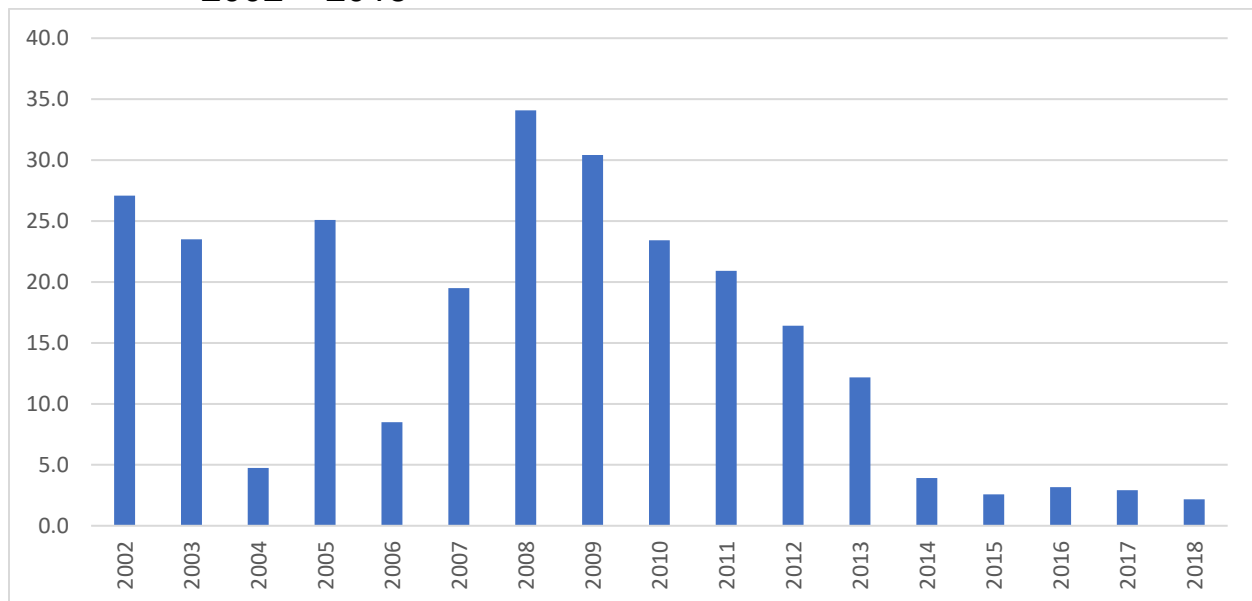
Graph 46: ZIP 66112, Average Wage of Employees, Health & Personal Care Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 46 shows that the average wage level in ZIP code 66112 is relatively stable for the entire period. Again, this is probably associated with the larger number of employees.

Graph 47: ZIP 66111, Average Number of Employees, Gasoline Stations, 2002 – 2018

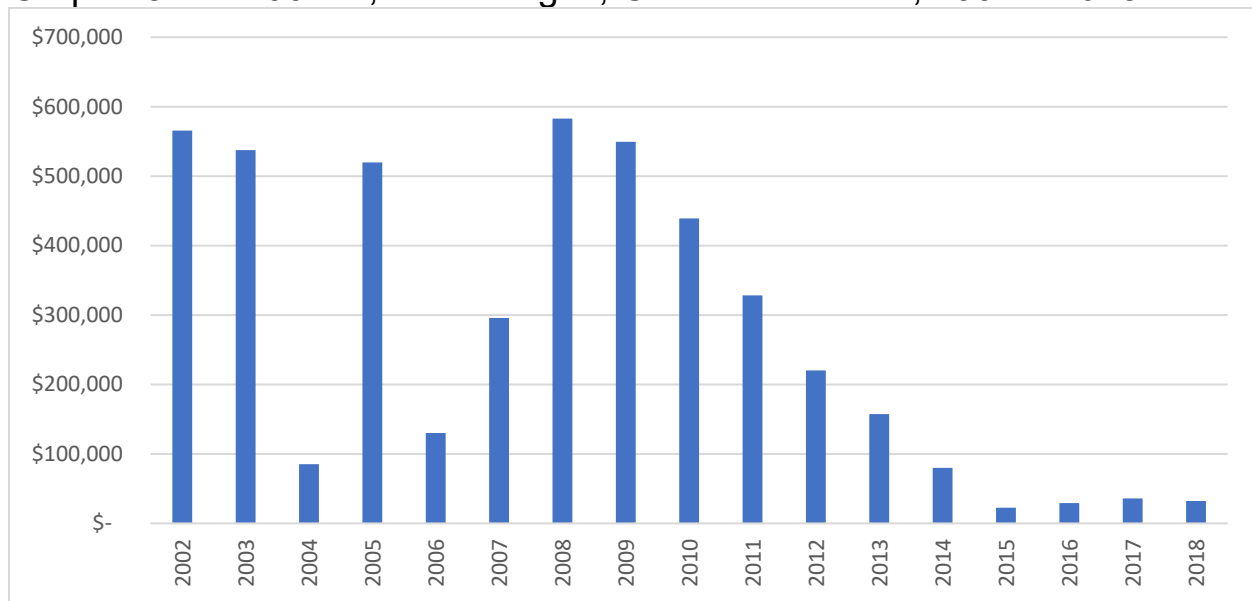


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 47 shows a decline in the number of employees of gasoline stations. However, this is probably related to the trend to consolidate grocery store chains and gasoline stations rather than an actual decline in the number of places where gasoline can be purchased.

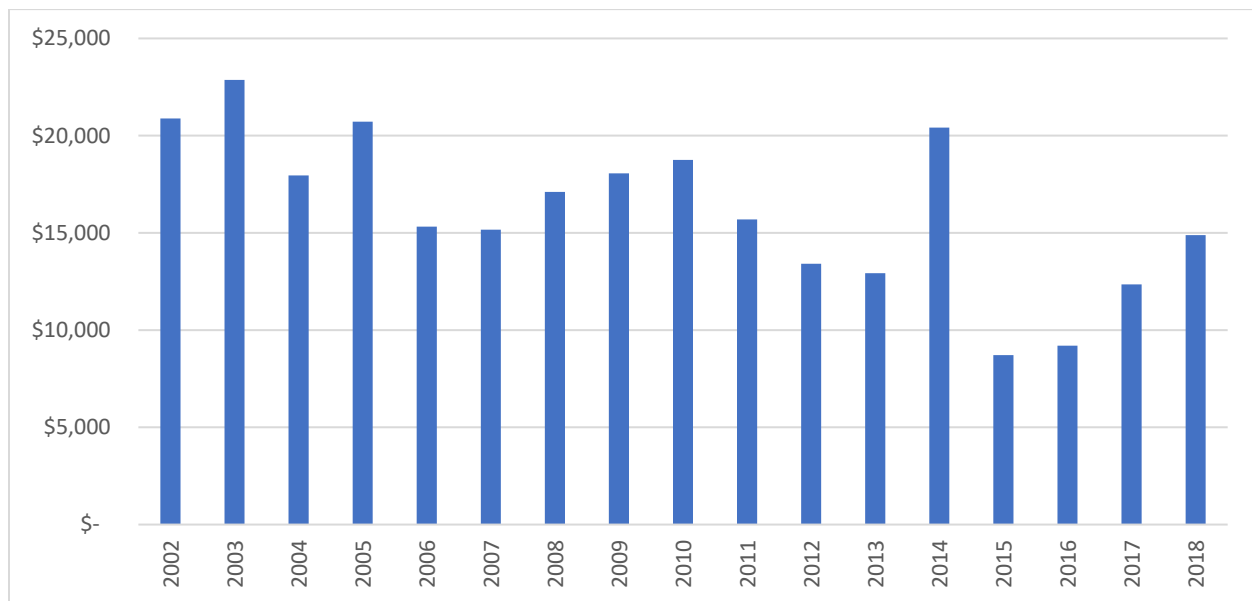
Graph 48 shows a similar pattern of decline in total wages for gasoline stations, although Graph 49 shows a more stable pattern for the average wage at gasoline stations in ZIP code 66111.

Graph 48: ZIP 66111, Total Wages, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

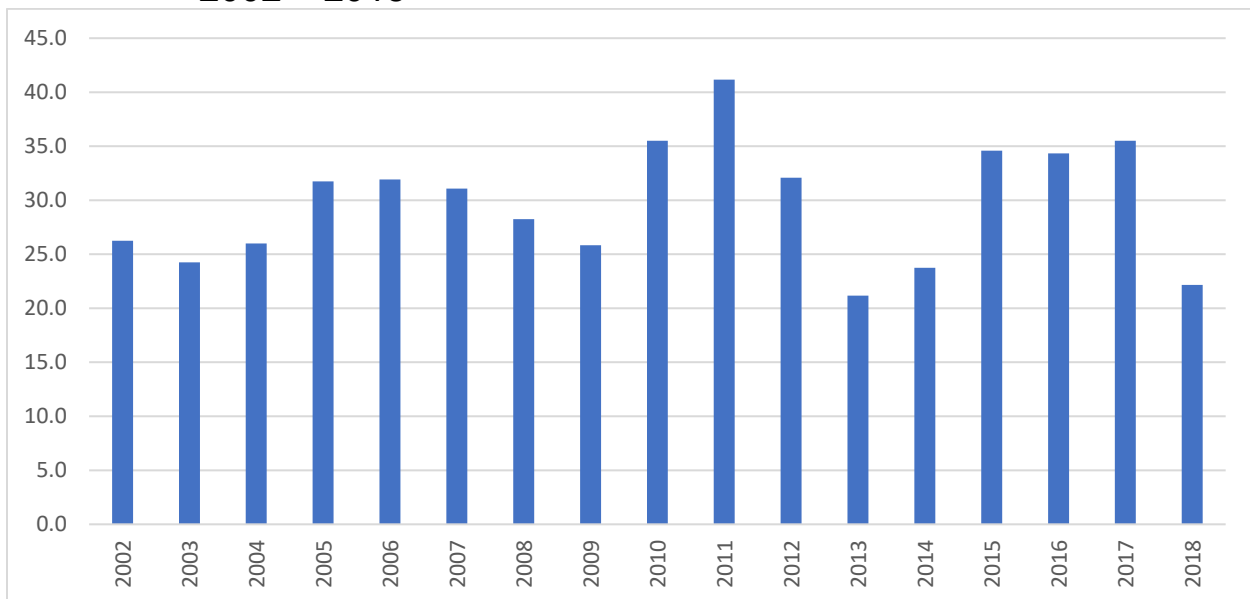
Graph 49: ZIP 66111, Average Wage, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



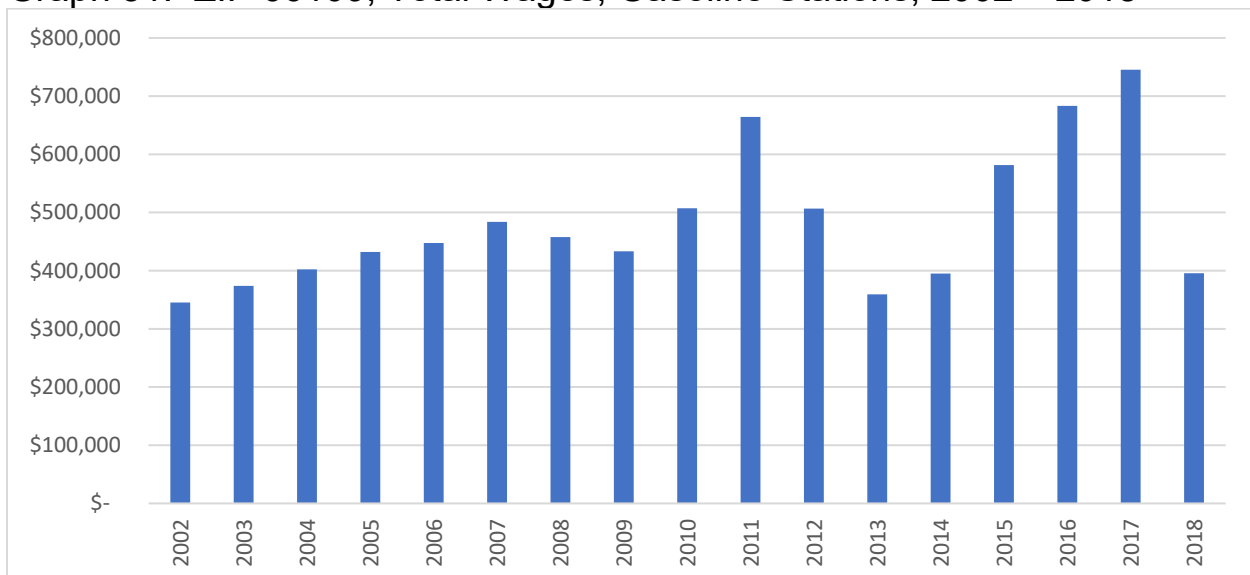
Graph 50: ZIP 66109, Average Number of Employees, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

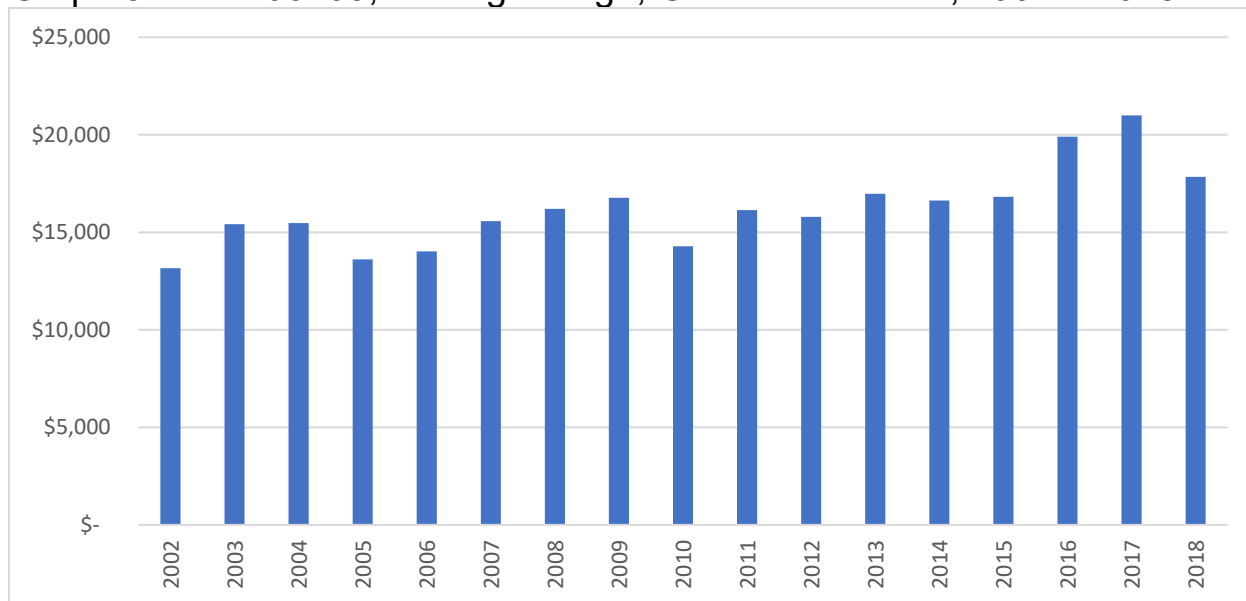
Graphs 50 through 52 show that in ZIP code 66109 employment and wages have remained stable over the time period. The sector is relatively small with a high of 41 employees and a low of 21 employees.

Graph 51: ZIP 66109, Total Wages, Gasoline Stations, 2002 – 2018



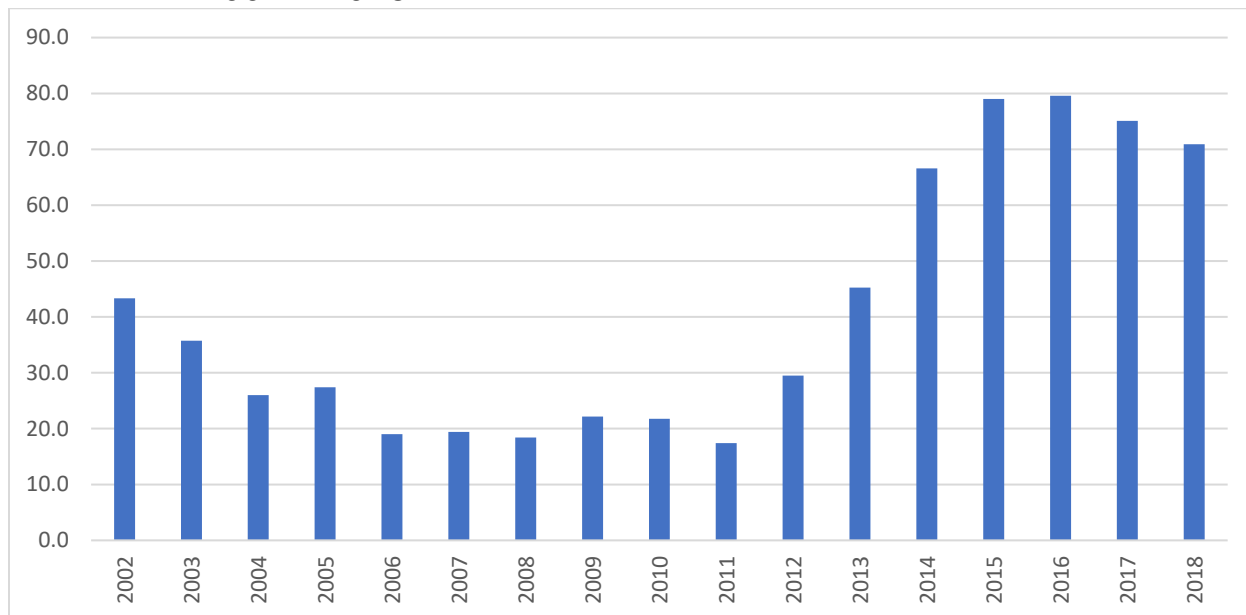
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 52: ZIP 66109, Average Wage, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 53: ZIP 66112, Average Number of Employees, Gasoline Stations, 2002 – 2018

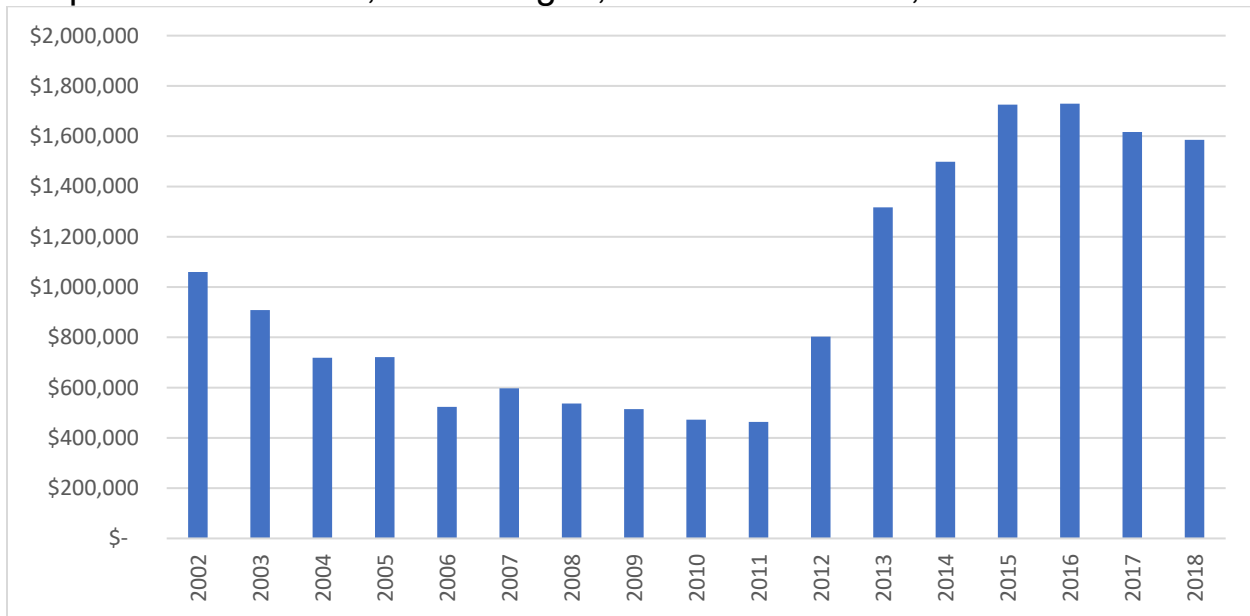


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 53 shows a rapid increase in number of employees at gasoline stations in ZIP code 66112 starting in 2012. The rapid increase in number of employees

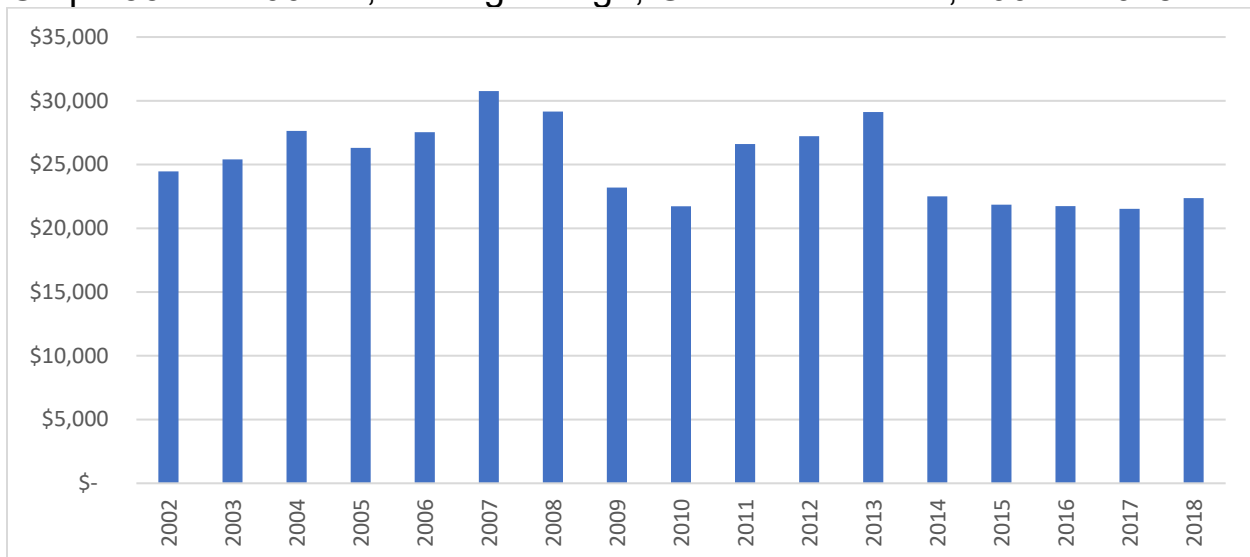
carries to total wages as shown in Graph 54. Again, this may show indirect evidence of the spillover effects of the various STAR Bond projects to the west of this ZIP code.

**Graph 54: ZIP 66112, Total Wages, Gasoline Stations, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

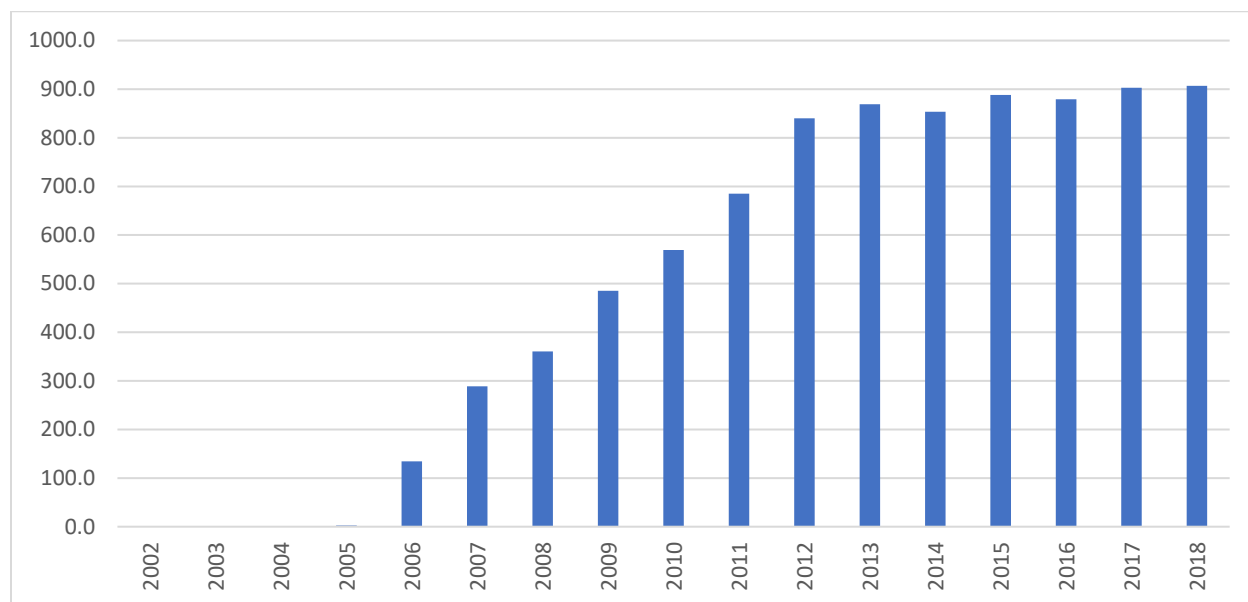
**Graph 55: ZIP 66112, Average Wage, Gasoline Stations, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 55 shows that the average wage for gasoline station employees in ZIP code 66112 has remained quite stable.

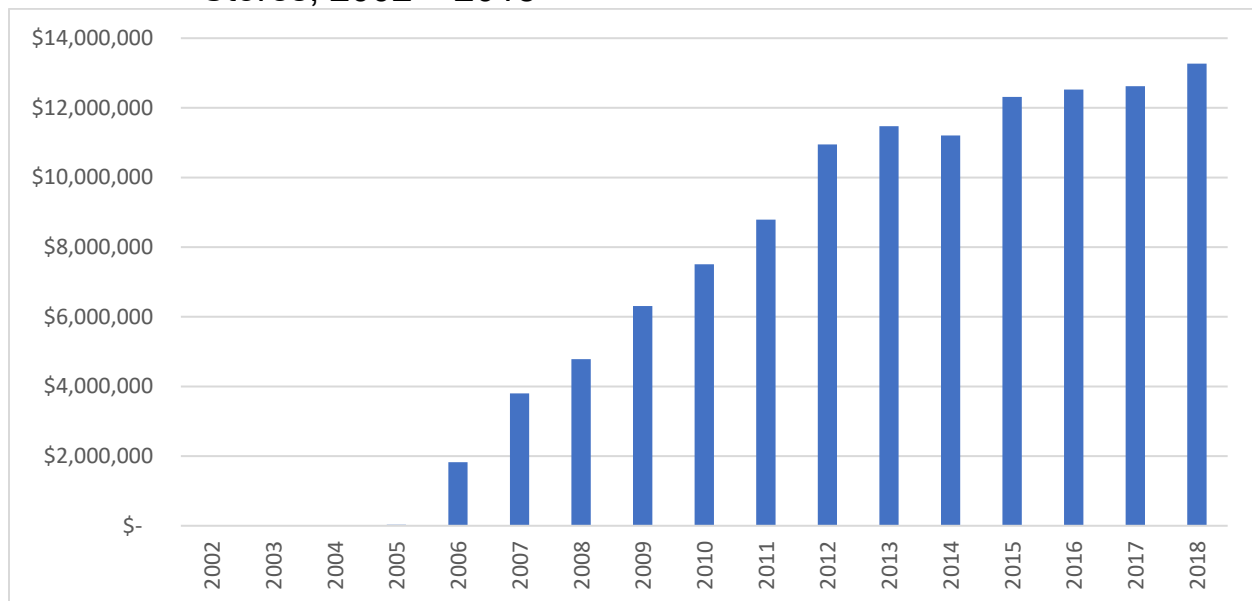
Graph 56: ZIP 66111, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

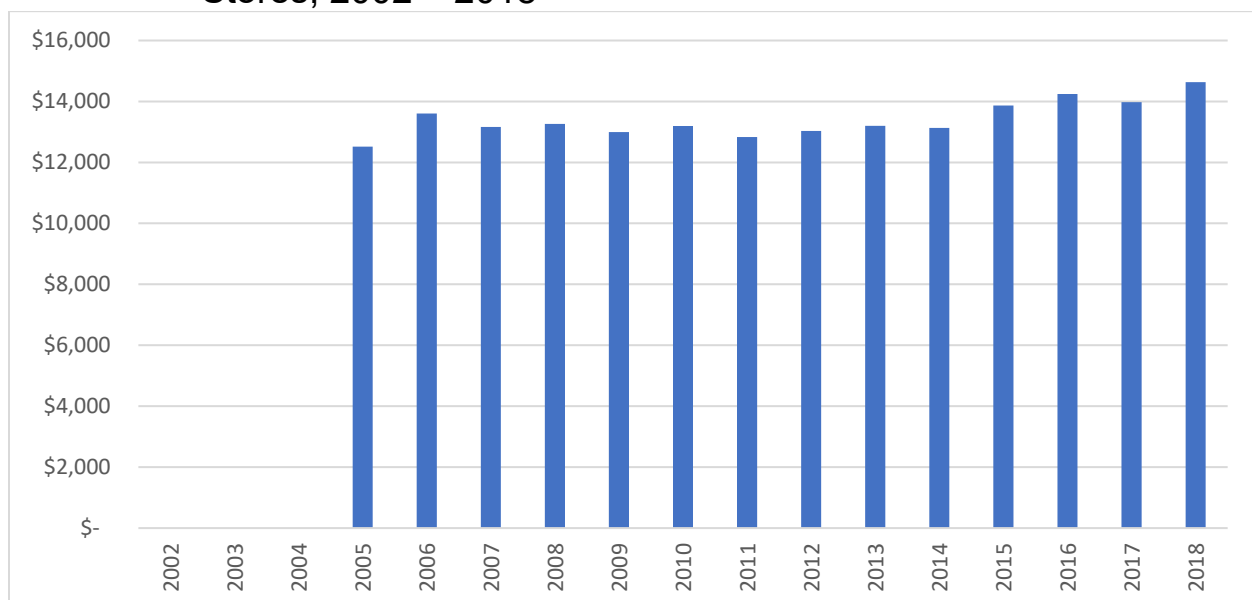
Graph 56 shows that there were no employees of clothing and clothing accessories stores in ZIP code 66111 before 2006. From 2006 through 2012 the number of employees grew to more than 800 people. And, since 2012 the number has remained stable. Graph 57 shows that total wages for these employees now exceeds \$12,000,000. This new income is very likely the result of the various STAR Bond projects in this ZIP code. Of course, the average wage, as shown in Graph 58, has remained relatively constant for these employees.

**Graph 57: ZIP 66111, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



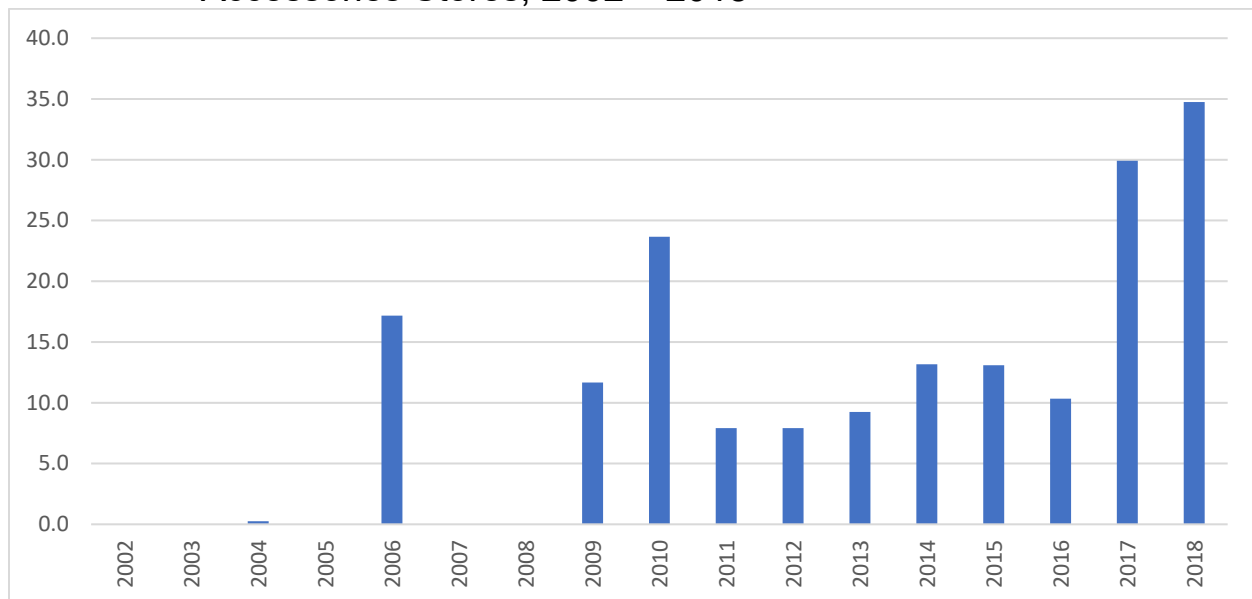
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 58: ZIP 66111, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

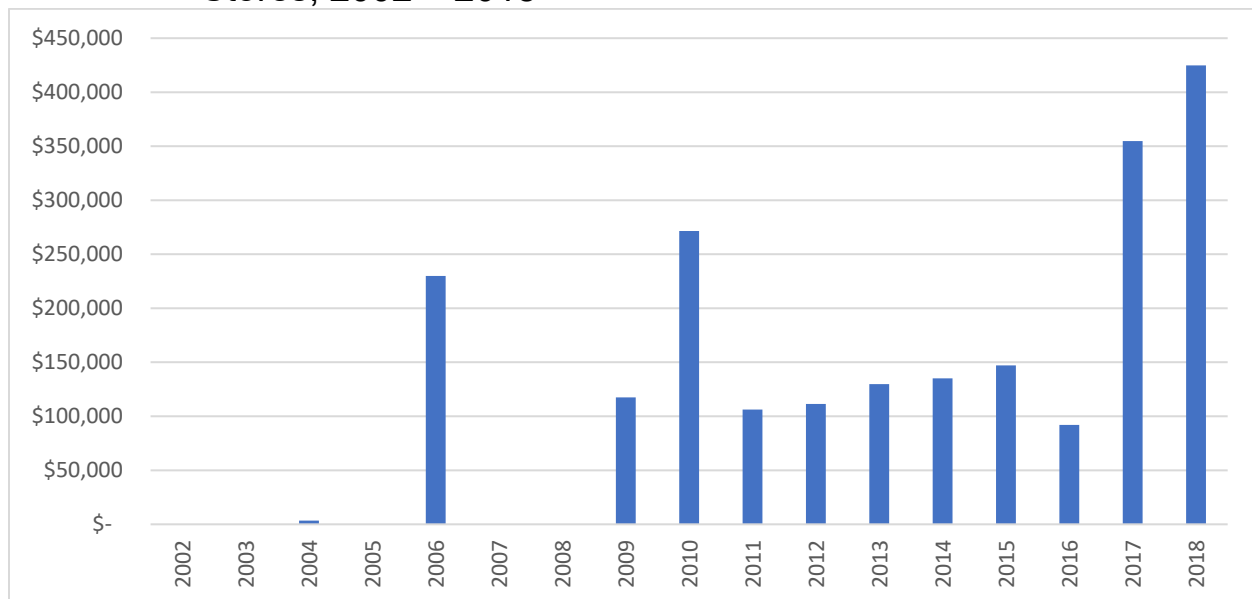
Graph 59: ZIP 66109, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

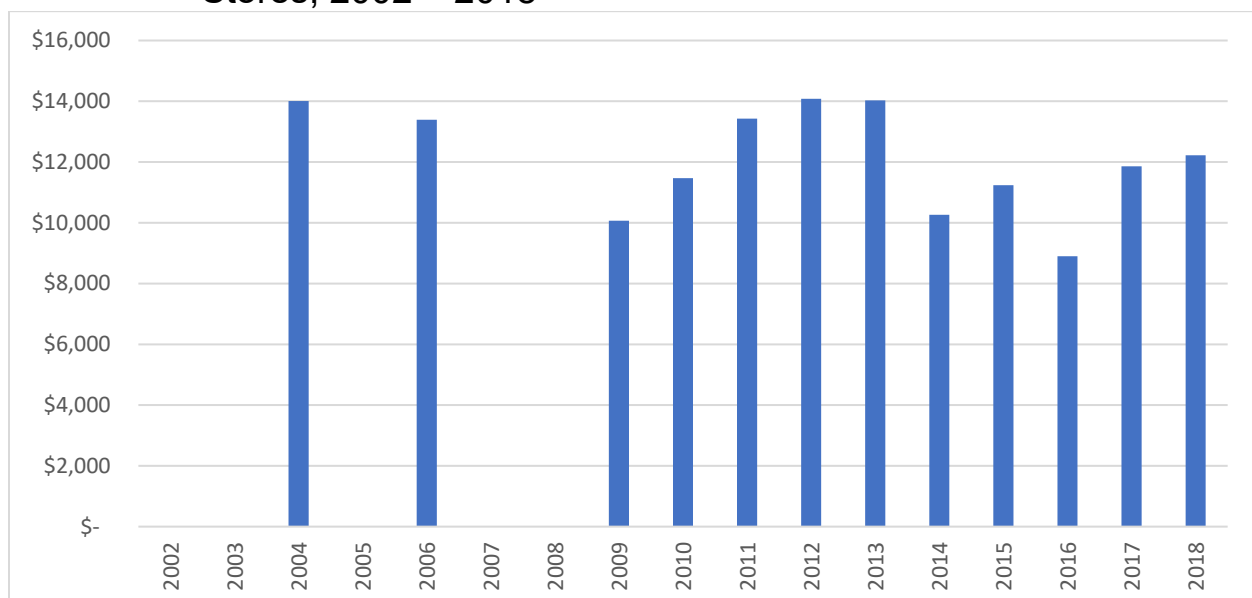
Graph 59 shows that based on the average number of employees in clothing and clothing accessories stores in ZIP 66109 there are probably no more than a handful of stores. There was not a consistent presence of these stores in this ZIP code until 2009. Since total wages depends upon employment, Graph 60 shows a similar pattern. And, as Graph 61 shows the average wage rate is fairly constant.

**Graph 60: ZIP 66109, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



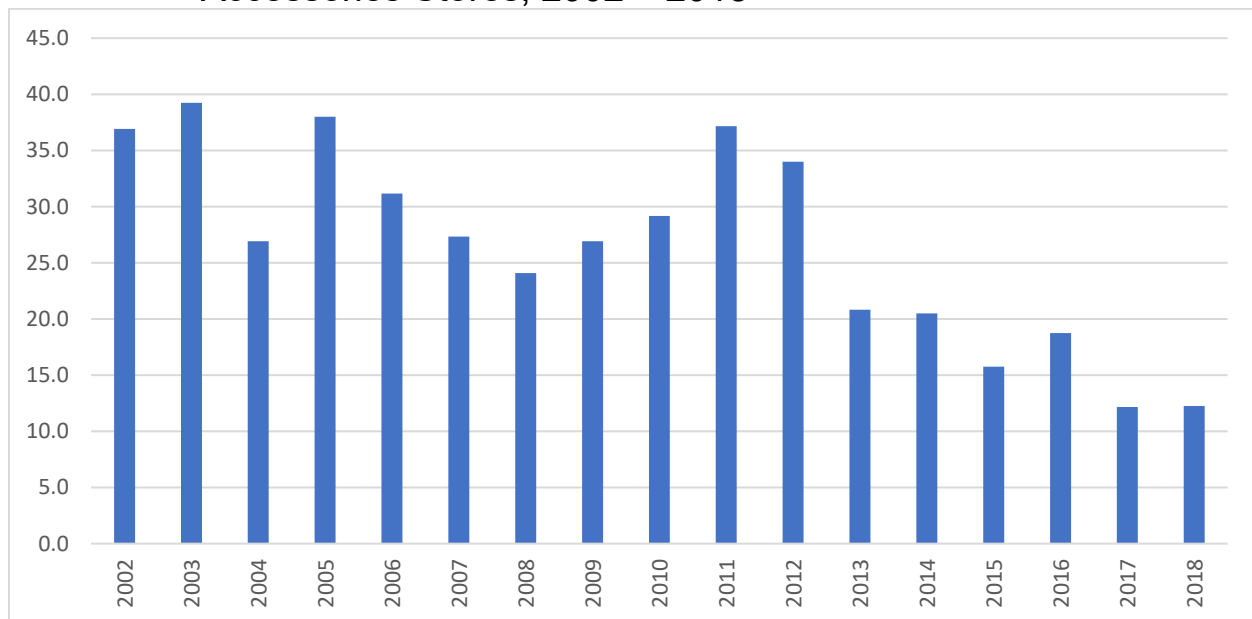
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 61: ZIP 66109, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 62: ZIP 66112, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018

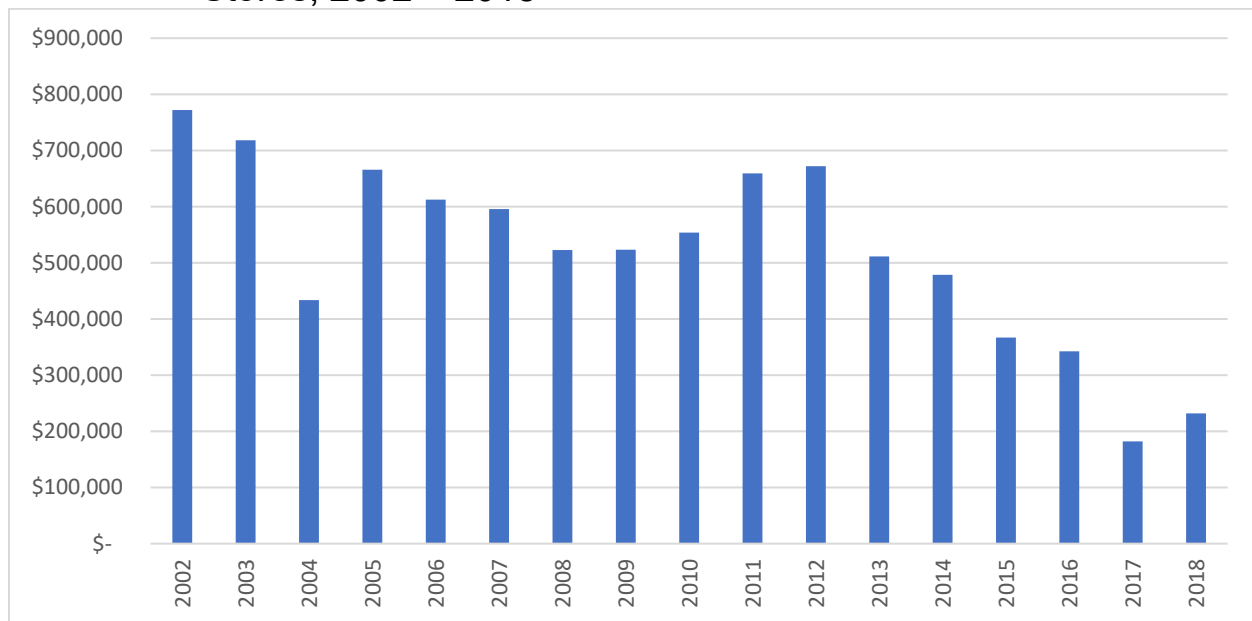


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

The data for ZIP code 66112, Graphs 62 through 64, suggests that some clothing and clothing accessories stores have either closed or moved during the period from 2002 through 2018. The average wage in ZIP 66112, Graph 64, was consistently higher than the average wage in either of the other two ZIP code areas.

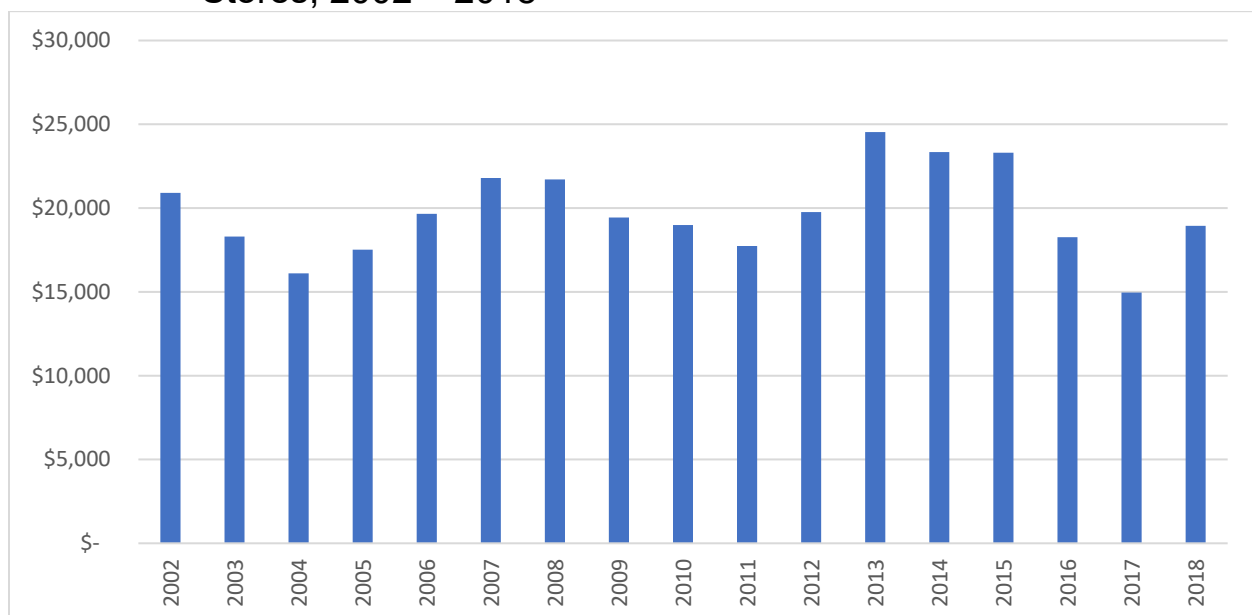


**Graph 63: ZIP 66112, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



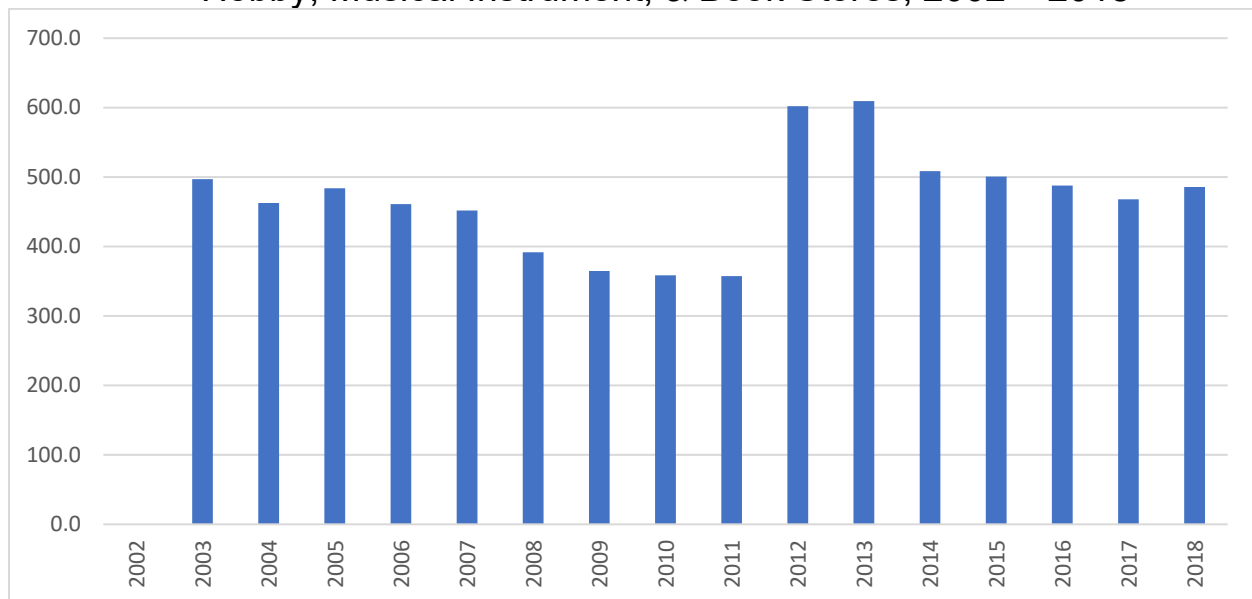
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 64: ZIP 66112, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

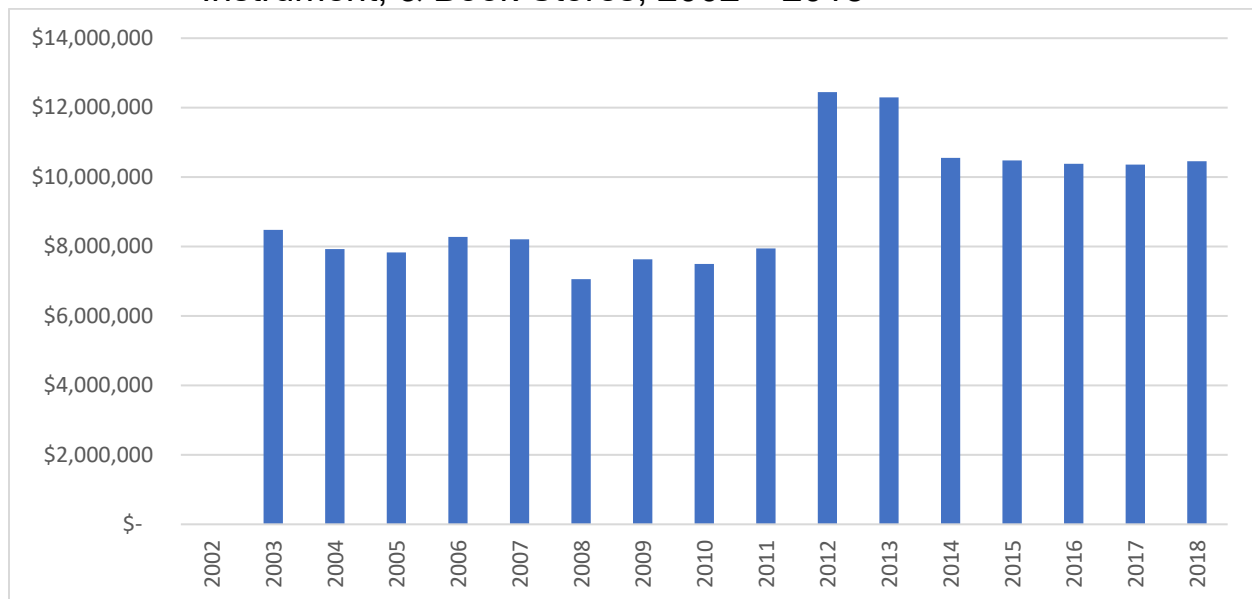
Graph 65: ZIP 66111, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

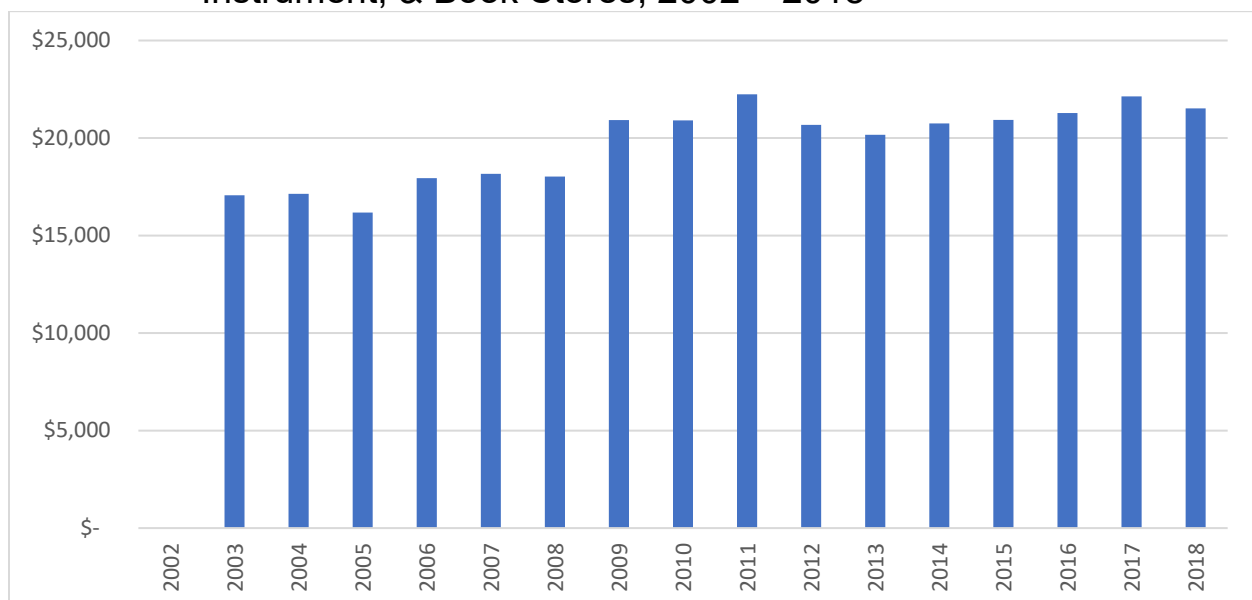
As the title of Graph 65 indicates this NAICS code includes a number of specialty stores. Given the number of employees in this sector in ZIP 66111, it is likely that one or more large stores dominant this sector. Nonetheless, as Graph 66 shows the total wage income for all these employees exceeds \$10,000,000. As they spend their incomes, some of their purchases will be subjected to sales taxes.

**Graph 66: ZIP 66111, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

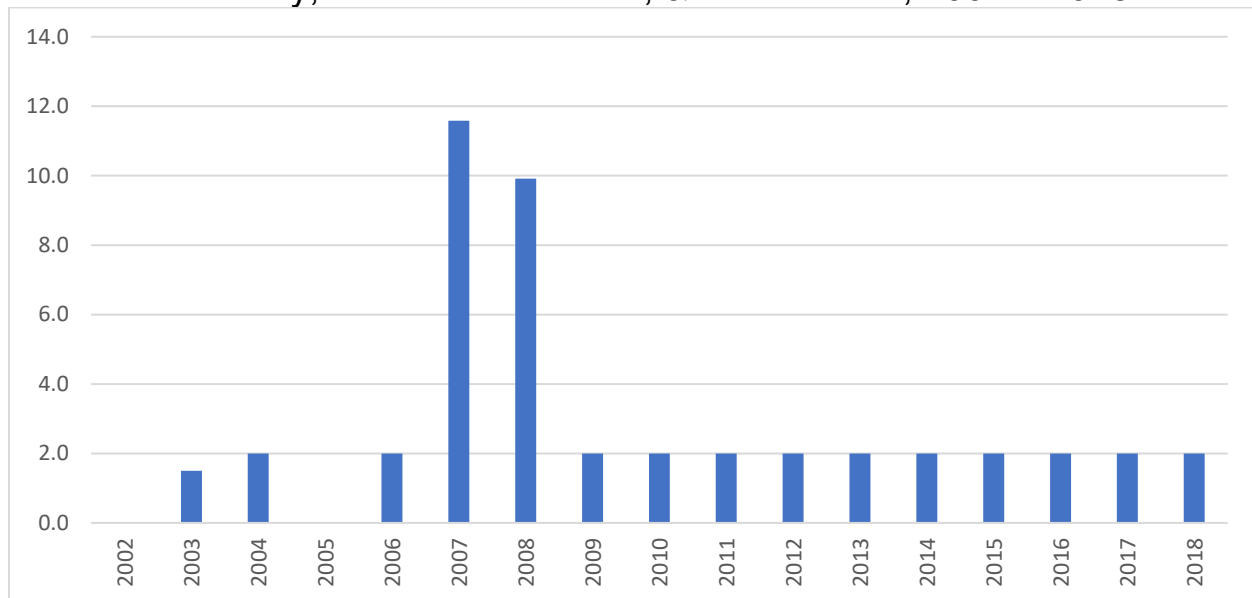
**Graph 67: ZIP 66111, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 67 shows that the average wage for this sector of the economy in ZIP 66111 has gradually increased over the time period observed.

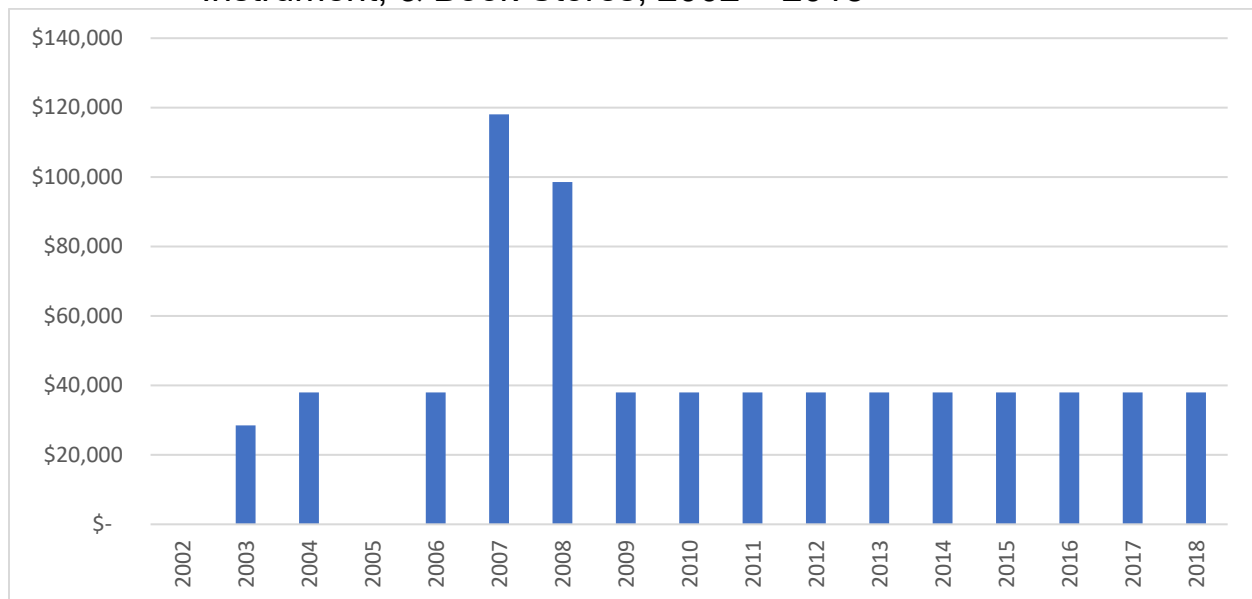
Graph 68: ZIP 66109, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

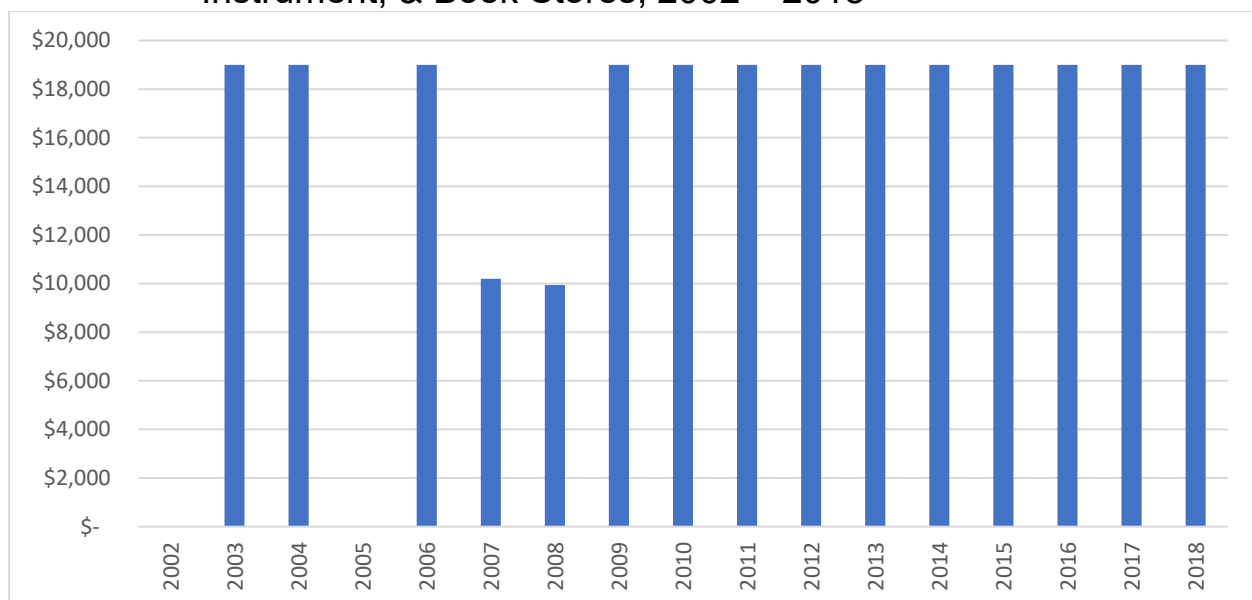
Graph 68 shows that in ZIP 66109 there is probably only one business with the exception of 2007 and 2008. This business is important to the owner and employees, but has very little impact on either Wyandotte County or the State of Kansas. As Graphs 69 and 70 show, there is little variation in either total wages or average wage over this time period.

**Graph 69: ZIP 66109, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



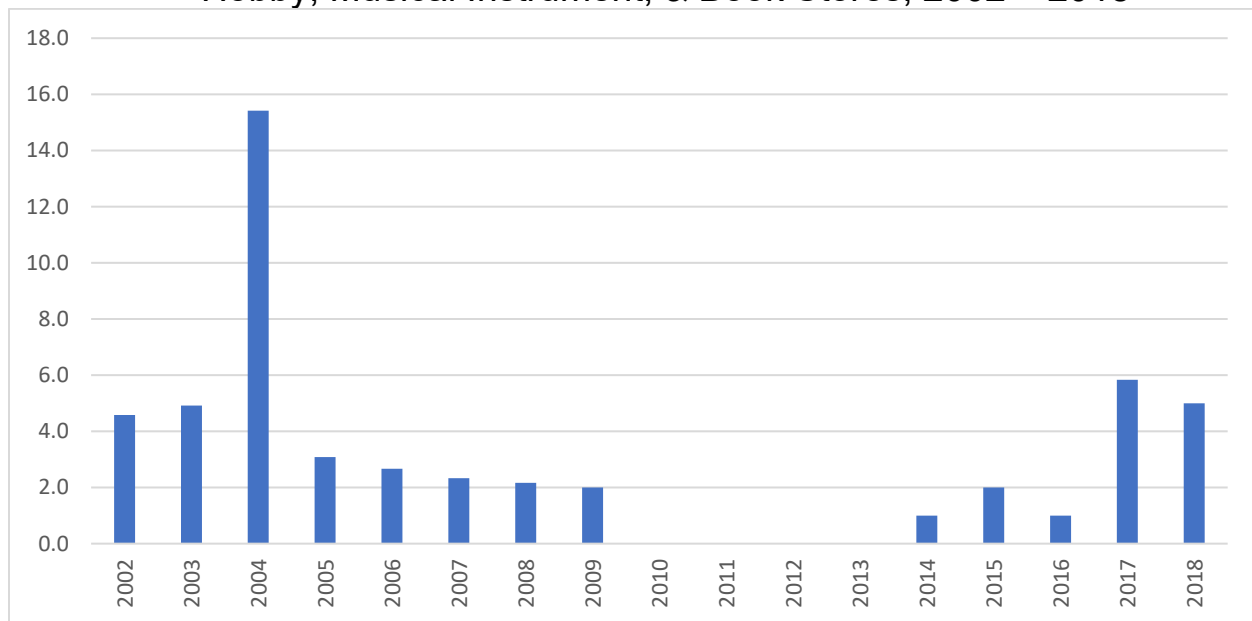
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 70: ZIP 66109, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

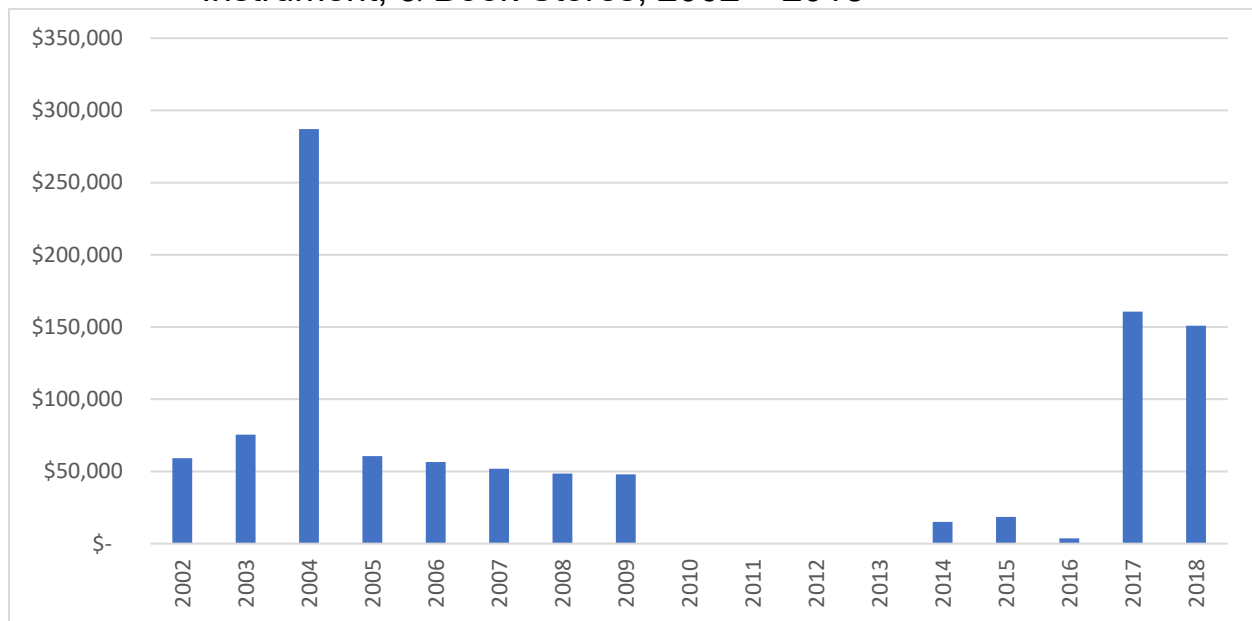
Graph 71: ZIP 66112, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

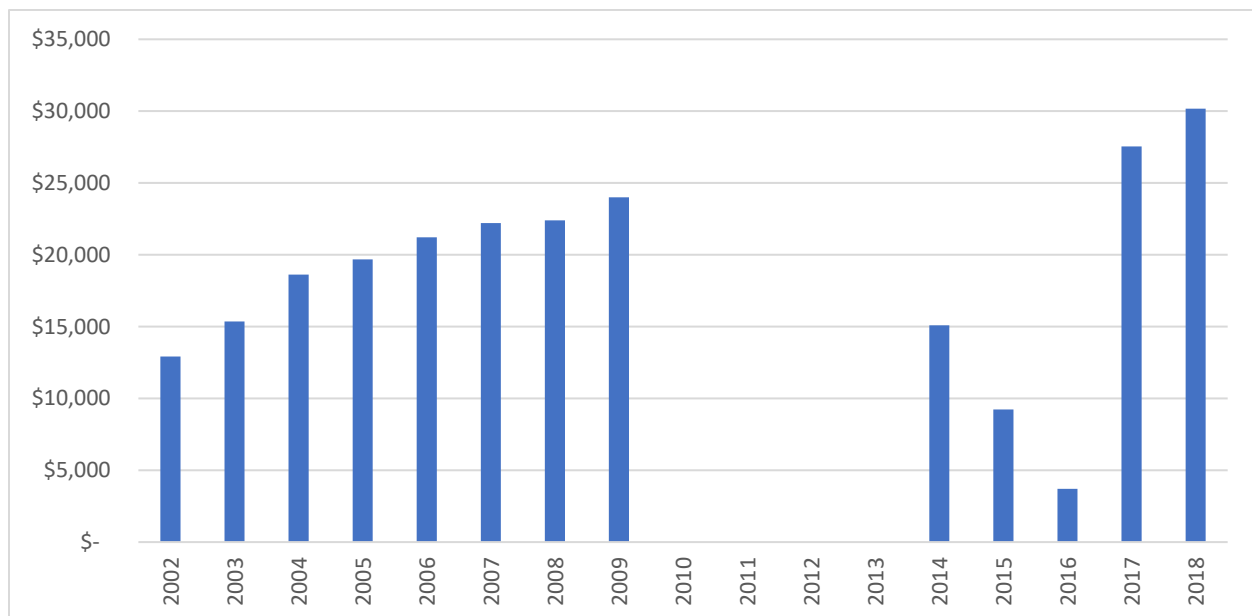
Graphs 71 through 73 show that in ZIP code 66112 the scale and pattern of business activity for this sector is generally similar to that found in ZIP 66109 with two exceptions. In 2004 there was a short lived increase in employment, either from a new entrant or an expansion of an existing business. And, in 2010 through 2013 there was no employment at all.

**Graph 72: ZIP 66112, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



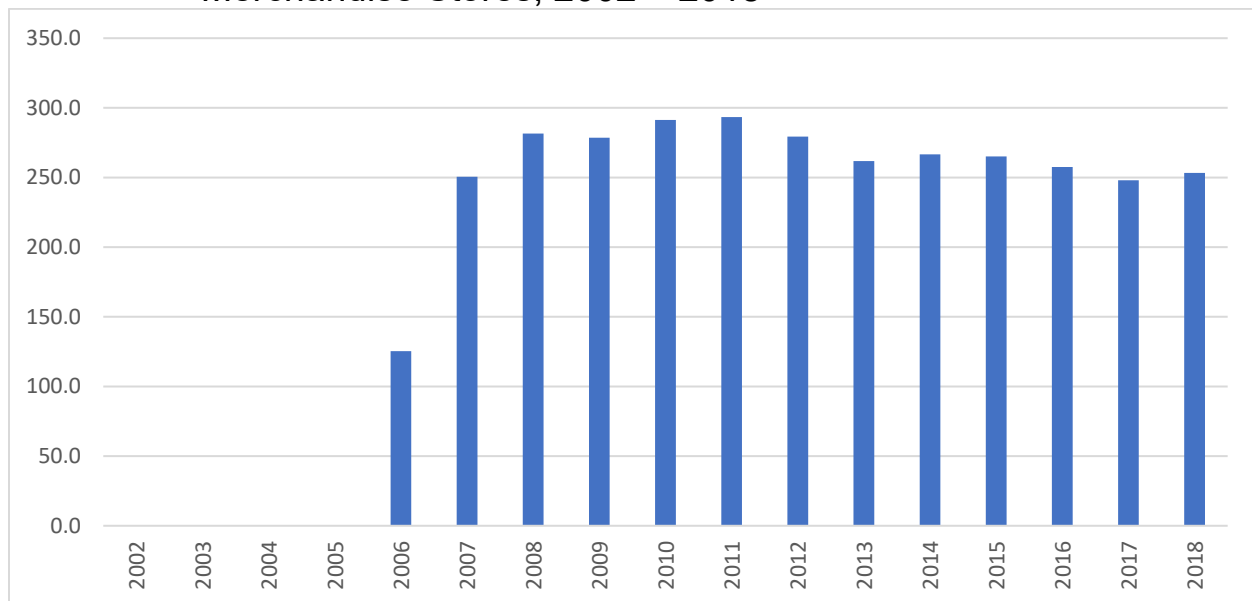
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 73: ZIP 66112, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

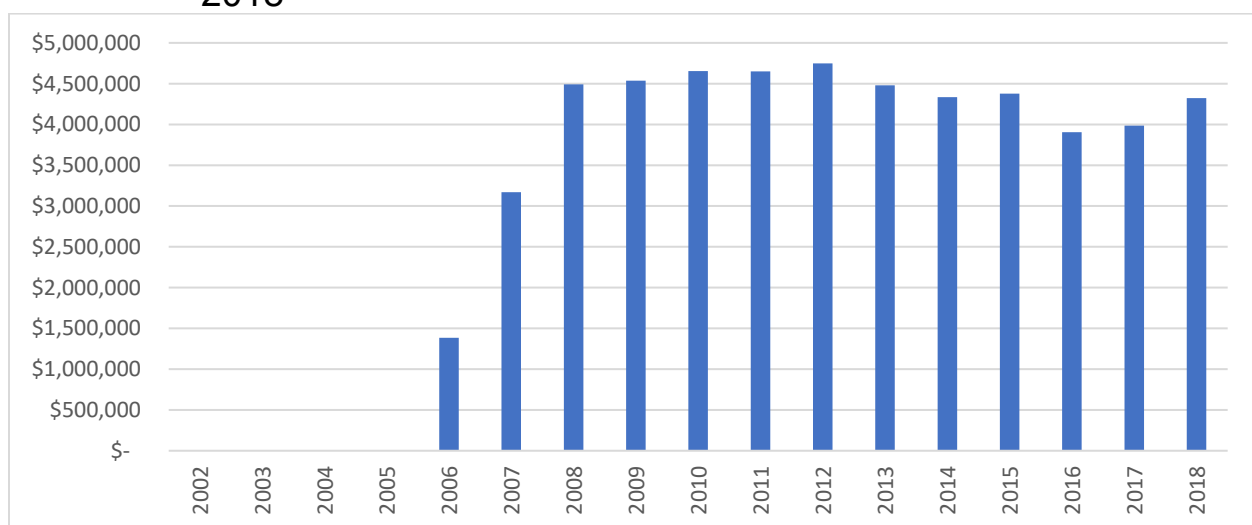
Graph 74: ZIP 66111, Average Number of Employees, General Merchandise Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 74 shows that, based on the number of employees, there were no general merchandise stores in ZIP 66111 prior to 2006. The employment level has remained fairly constant since 2007.

Graph 75: ZIP 66111, Total Wages, General Merchandise Stores, 2002 – 2018

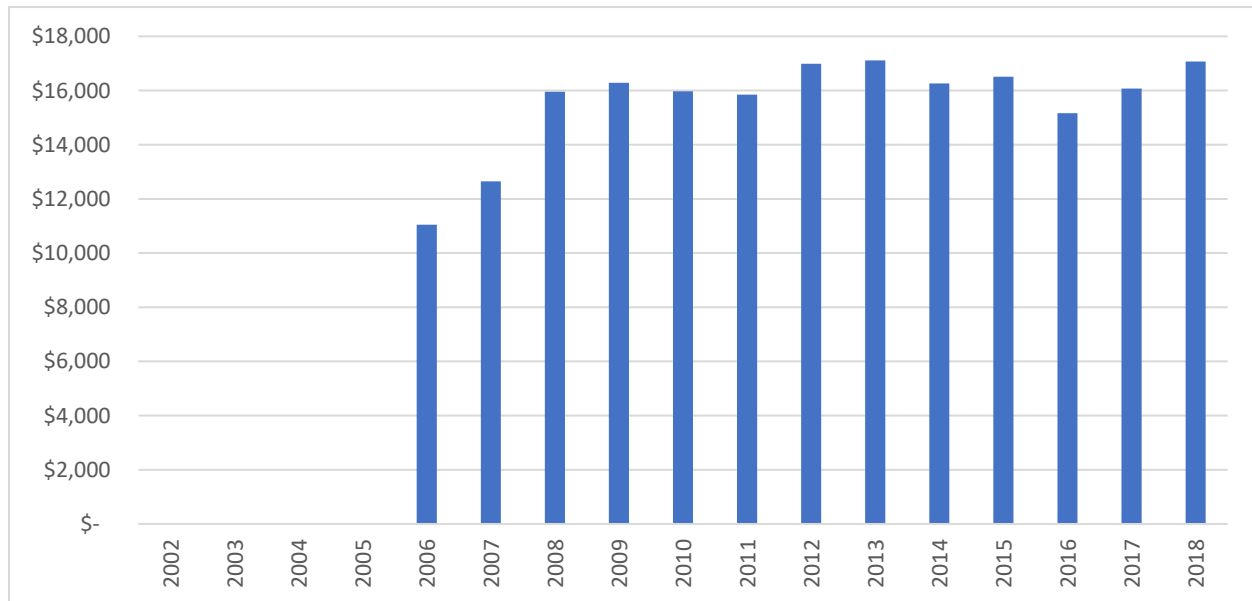


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



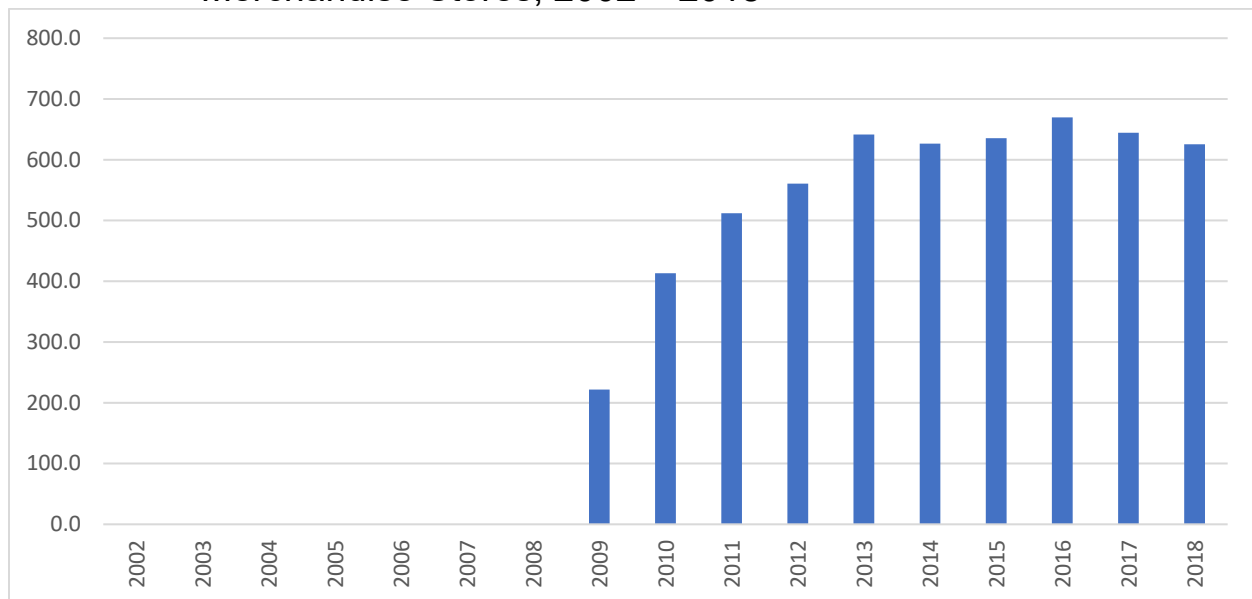
Graph 75 shows that total wages of general merchandise stores has averaged over \$4,000,000 since 2008 in ZIP 66111. Graph 76 shows that the average wage is relatively constant for the same period.

Graph 76: ZIP 66111, Average Wage, General Merchandise Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

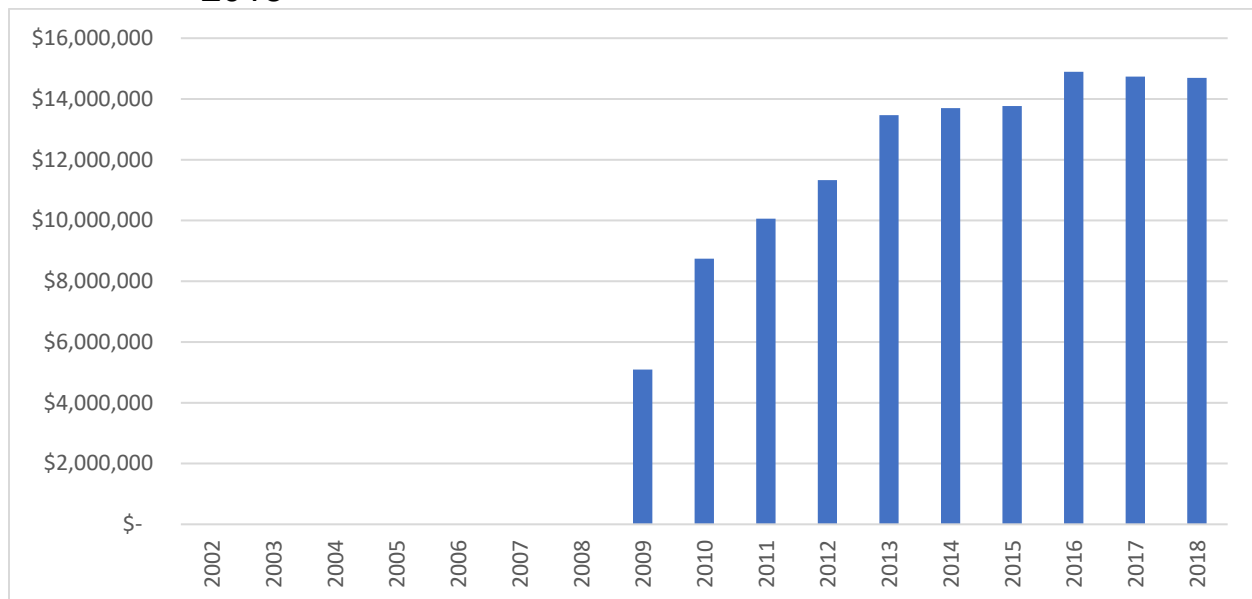
Graph 77: ZIP 66109, Average Number of Employees, General Merchandise Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

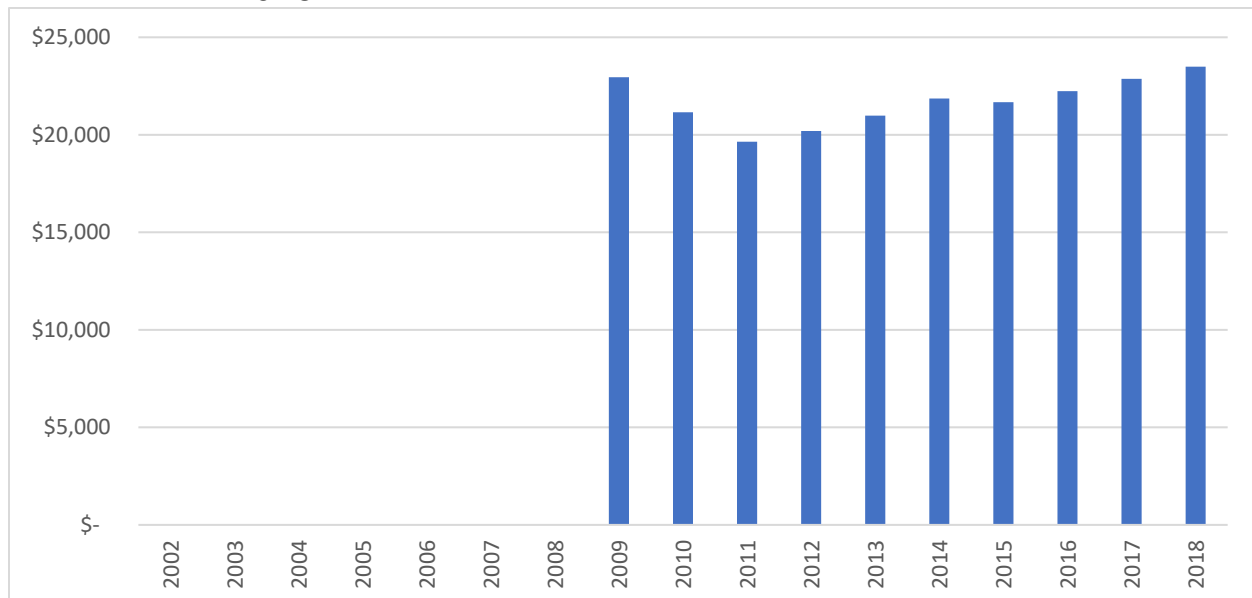
Graphs 77 through 79 show that for ZIP code 66109 which is mostly north of the STAR Bond projects area a pattern similar to ZIP 66111 exists, but it starts about three years later (2009). This is consistent with the concept of spillover development. In this case, the level of employment and the average wage are greater in ZIP 66109 than they were in ZIP 66111. Of course, total wages are also greater.

**Graph 78: ZIP 66109, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

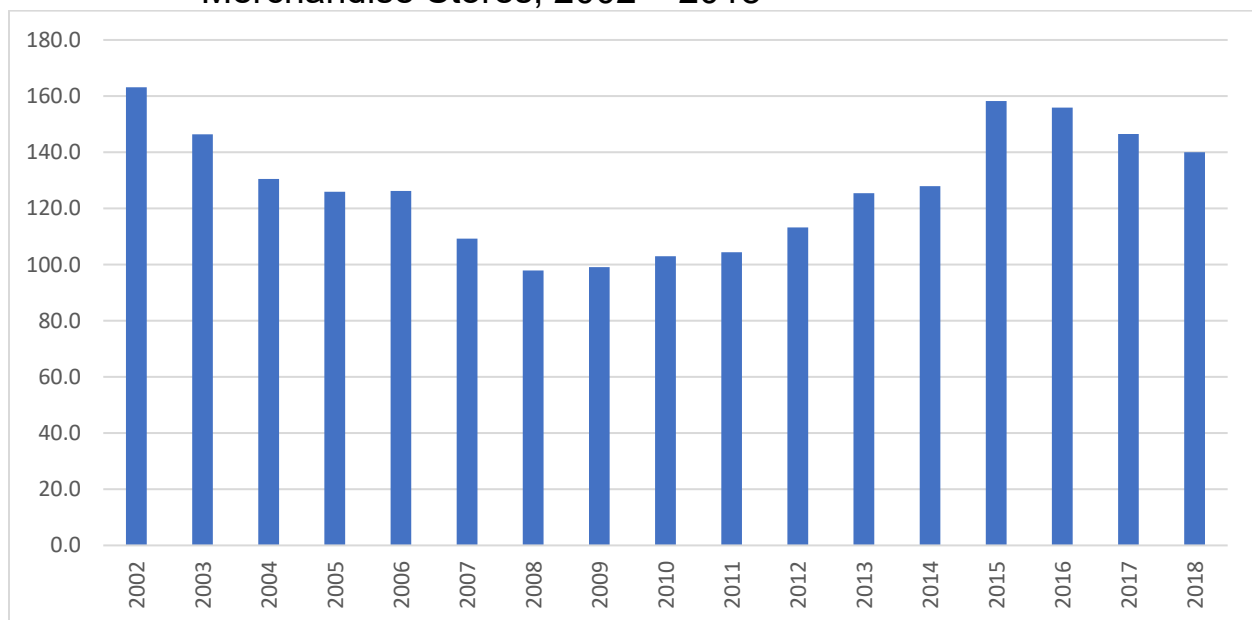
**Graph 79: ZIP 66109, Average Wage, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

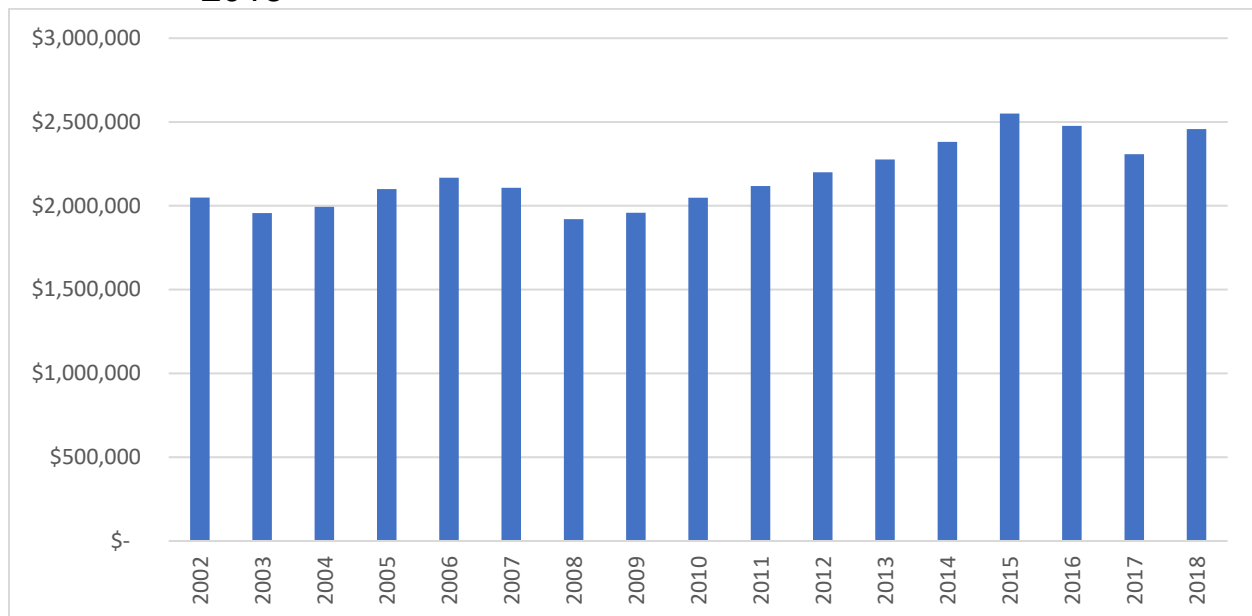
Graphs 80 through 82 show that for ZIP code 66112 there were existing general merchandise stores in 2002. The number of employees is smaller than the other two ZIP codes for the years when all of them have employment. The number of employees in 66112 dips as employment opportunities arise in ZIP 66111 and 66109, however the number of employees returns to its earlier levels.

Graph 80: ZIP 66112, Average Number of Employees, General Merchandise Stores, 2002 – 2018



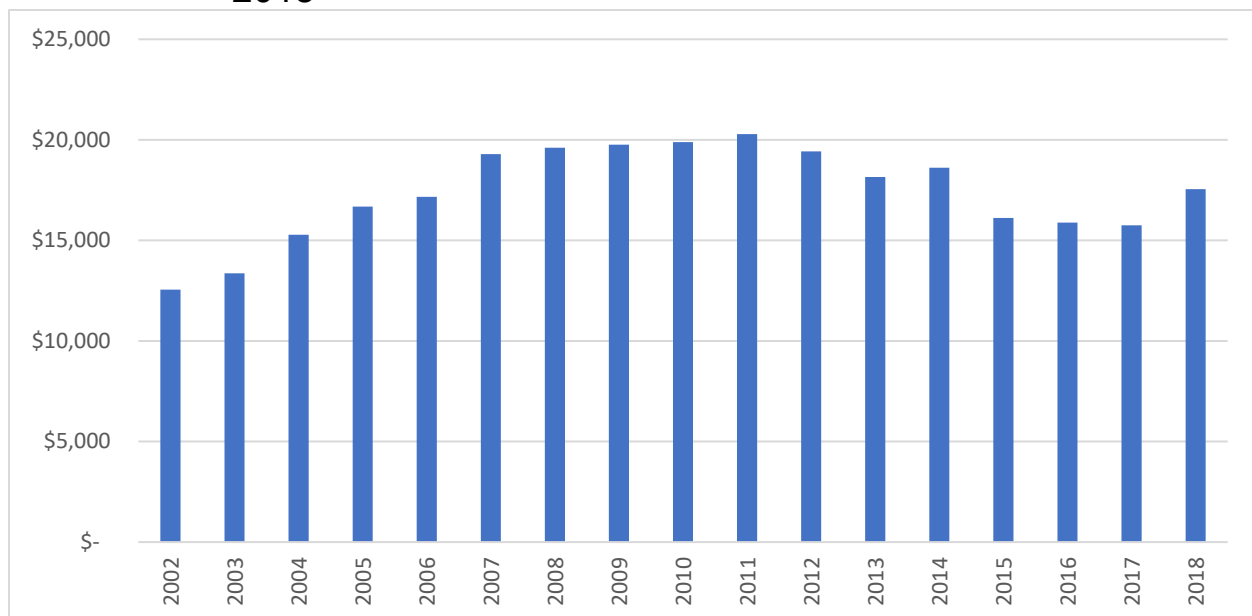
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 81: ZIP 66112, Total Wages, General Merchandise Stores, 2002 – 2018**



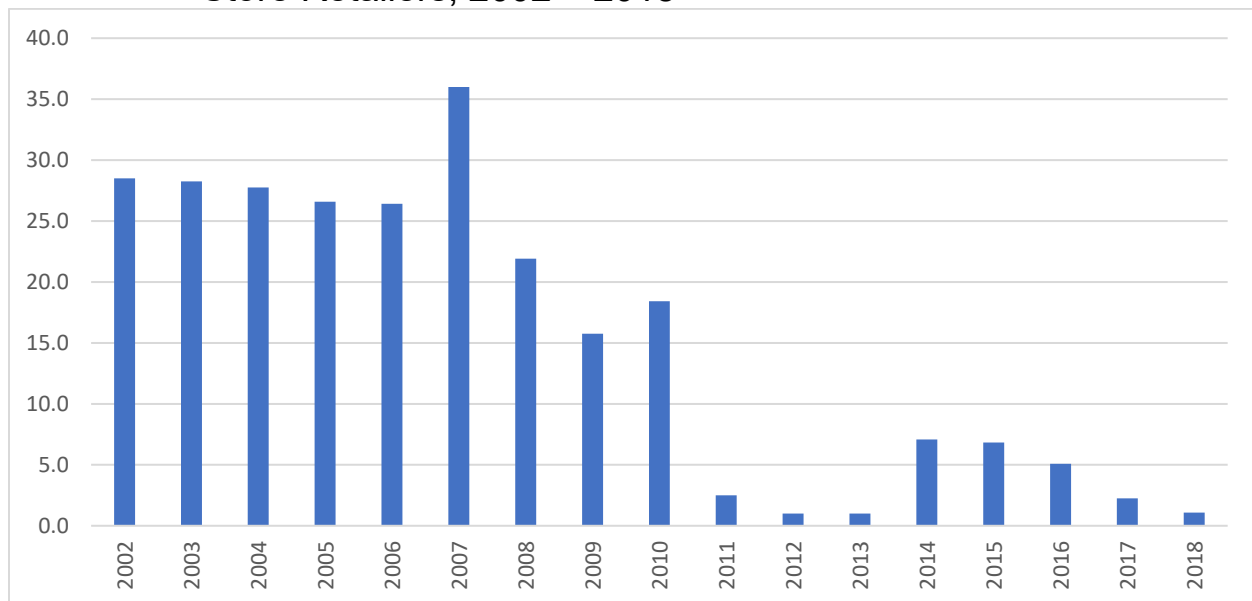
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 82: ZIP 66112, Average Wage, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

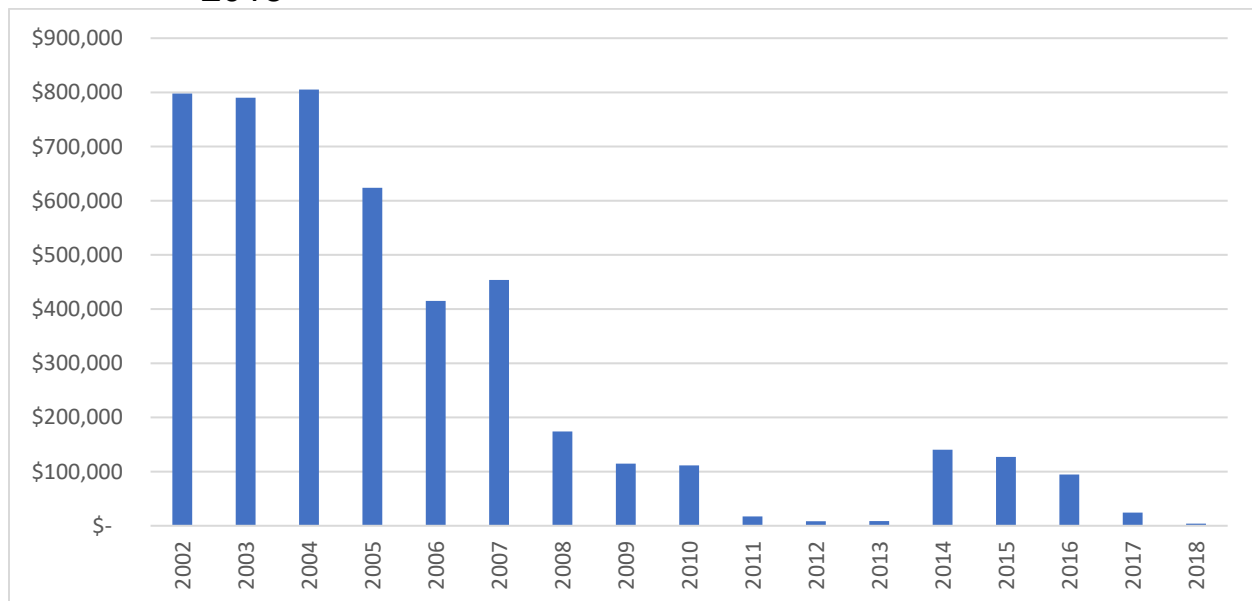
Graph 83: ZIP 66111, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

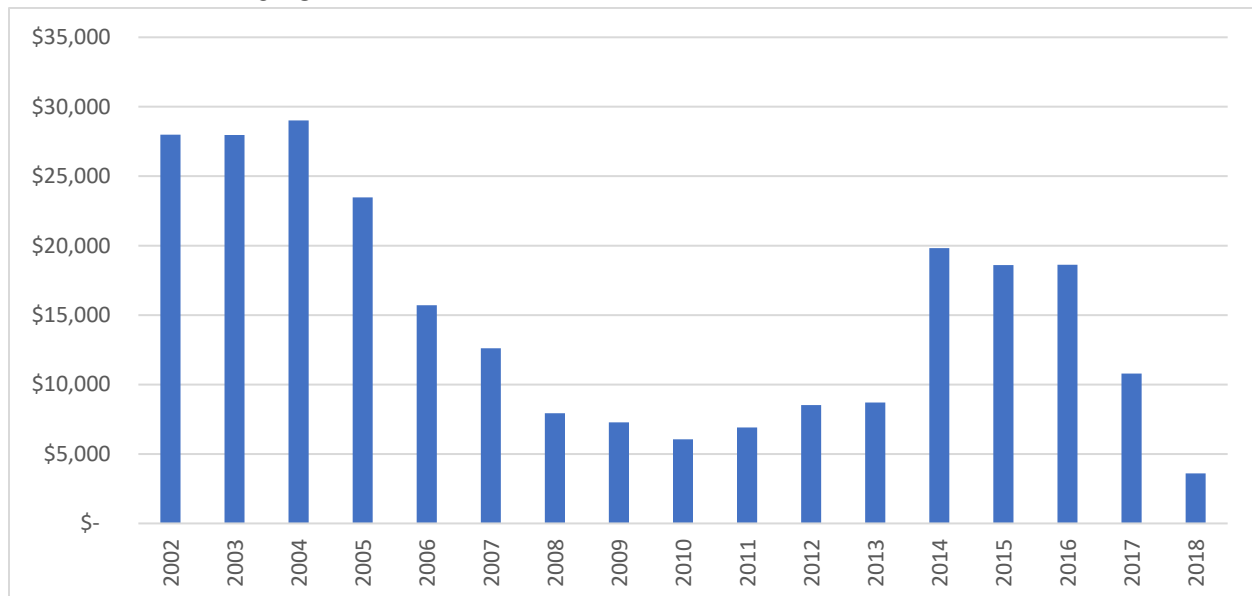
Miscellaneous store retailers is a catchall category for retail stores that do not fit in any other category. As can be seen from Graphs 83, 86, and 89 the numbers of employees are quite small in all three ZIP code areas. Graphs 85, 88, and 91 show that the average wage is also usually quite low. Although each of these businesses may be important to its owners, employees, and customers, in aggregate they are still quite small.

**Graph 84: ZIP 66111, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



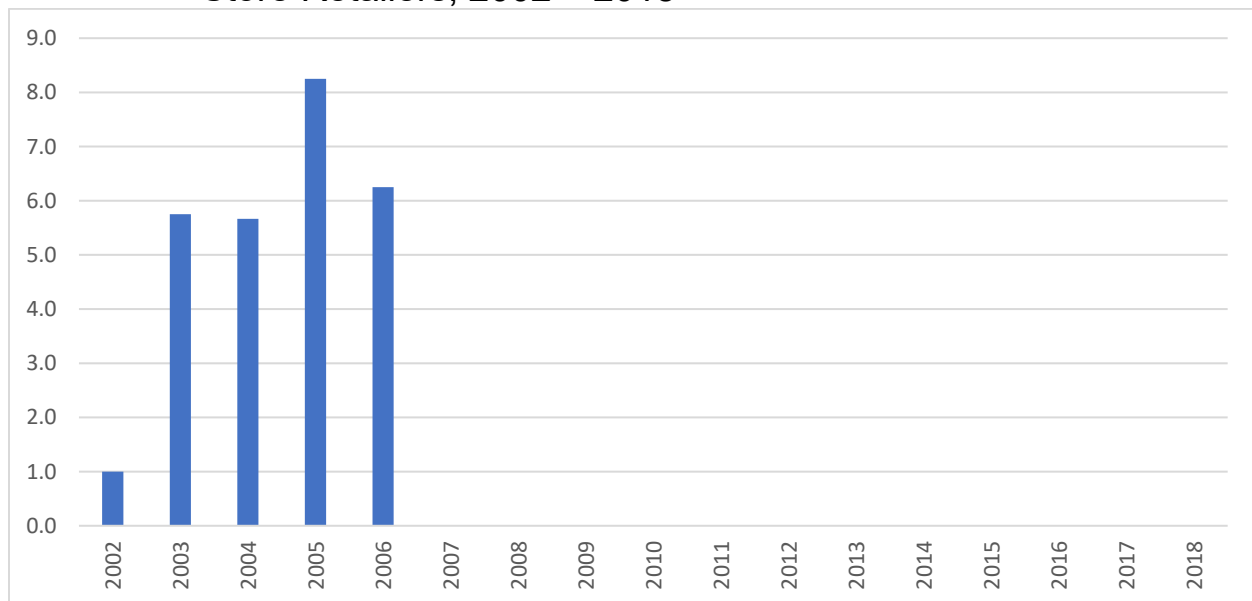
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 85: ZIP 66111, Average Wage, Miscellaneous Store Retailers, 2002 – 2018**



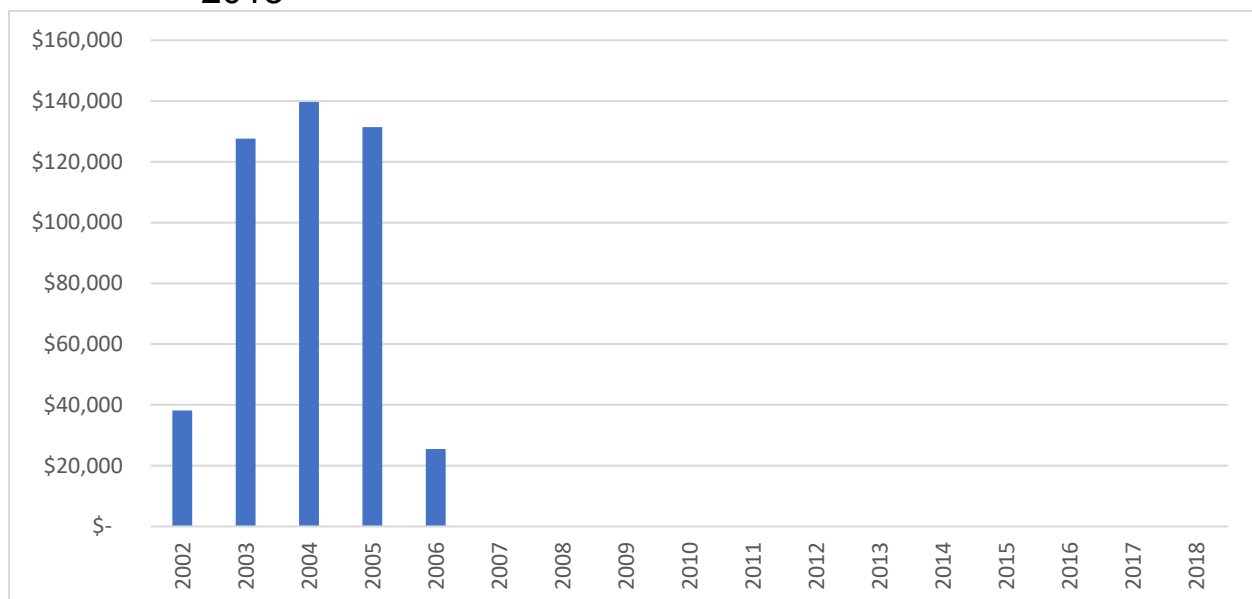
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 86: ZIP 66109, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

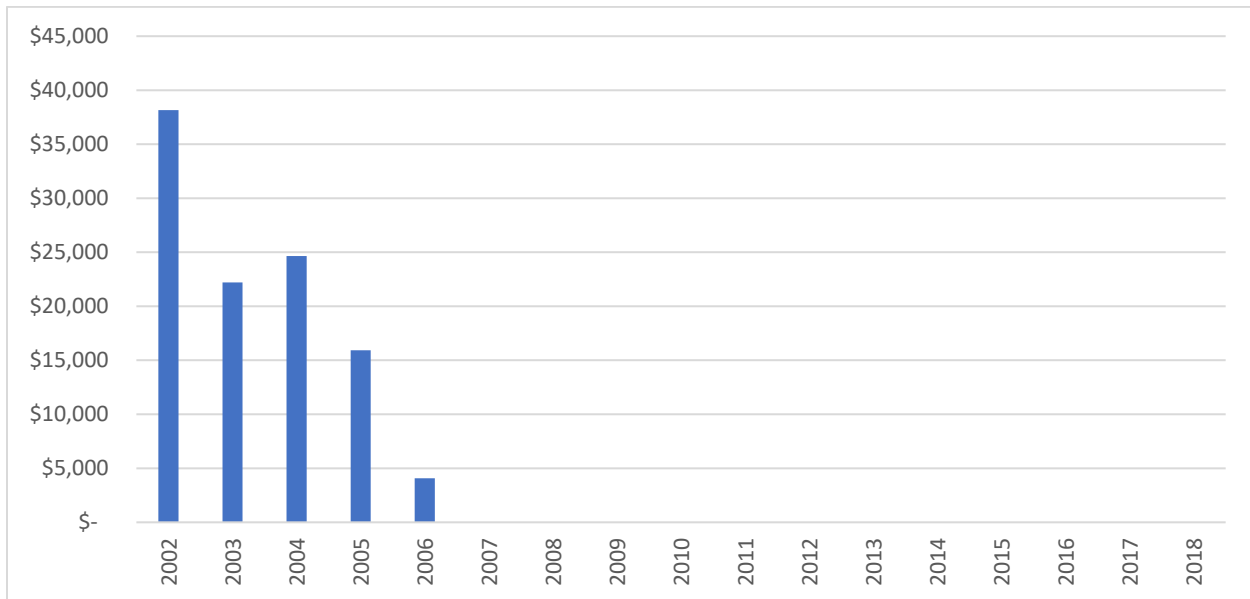
**Graph 87: ZIP 66109, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

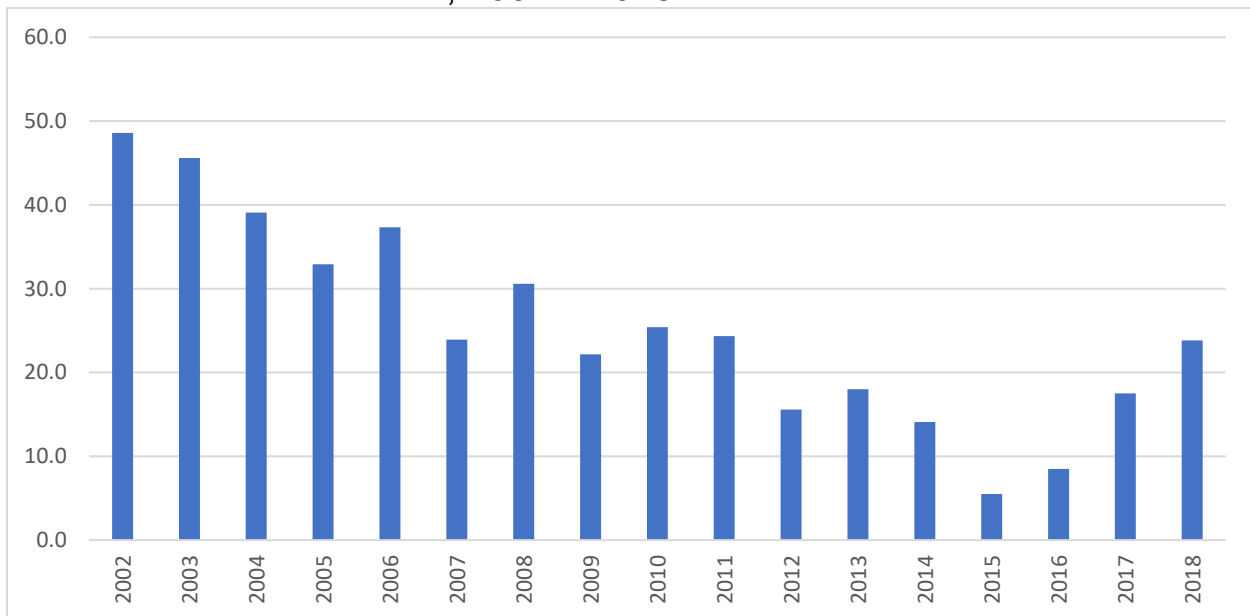


**Graph 88: ZIP 66109, Average Wage, Miscellaneous Store Retailers, 2002 – 2018**



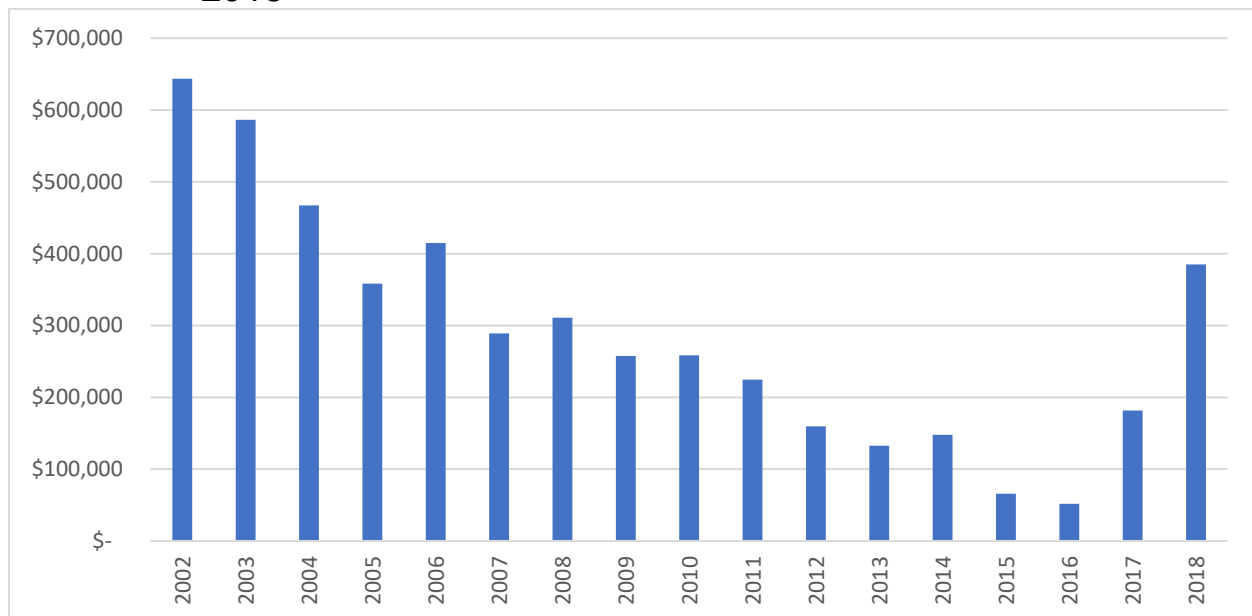
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 89: ZIP 66112, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



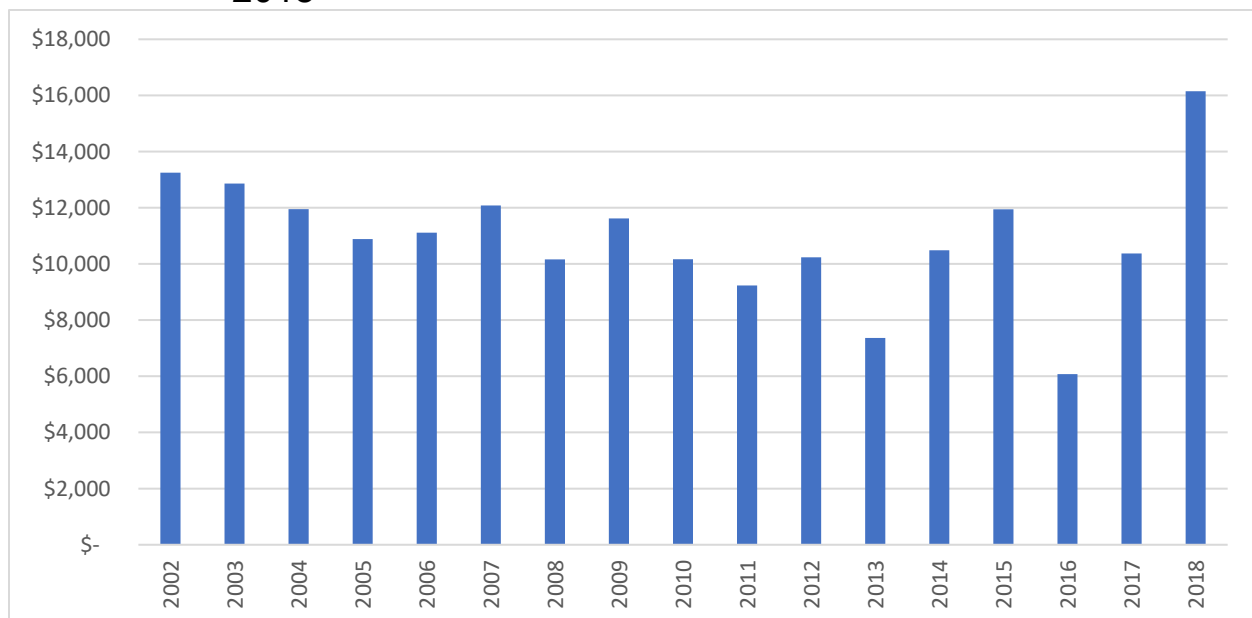
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 90: ZIP 66112, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



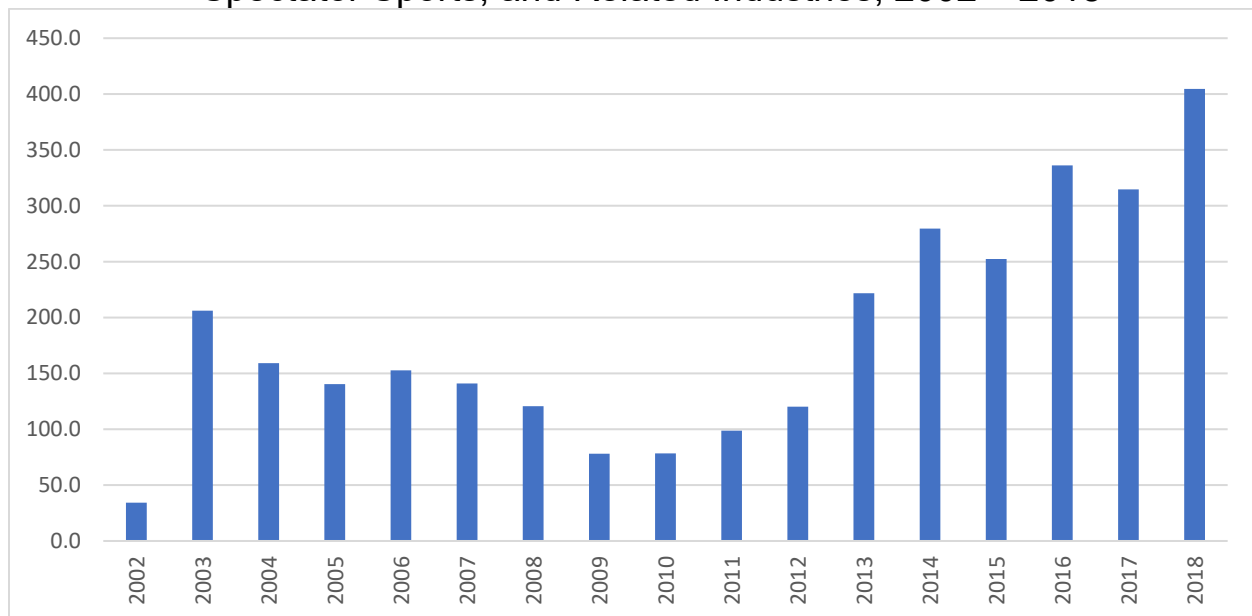
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 91: ZIP 66112, Average Wage, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

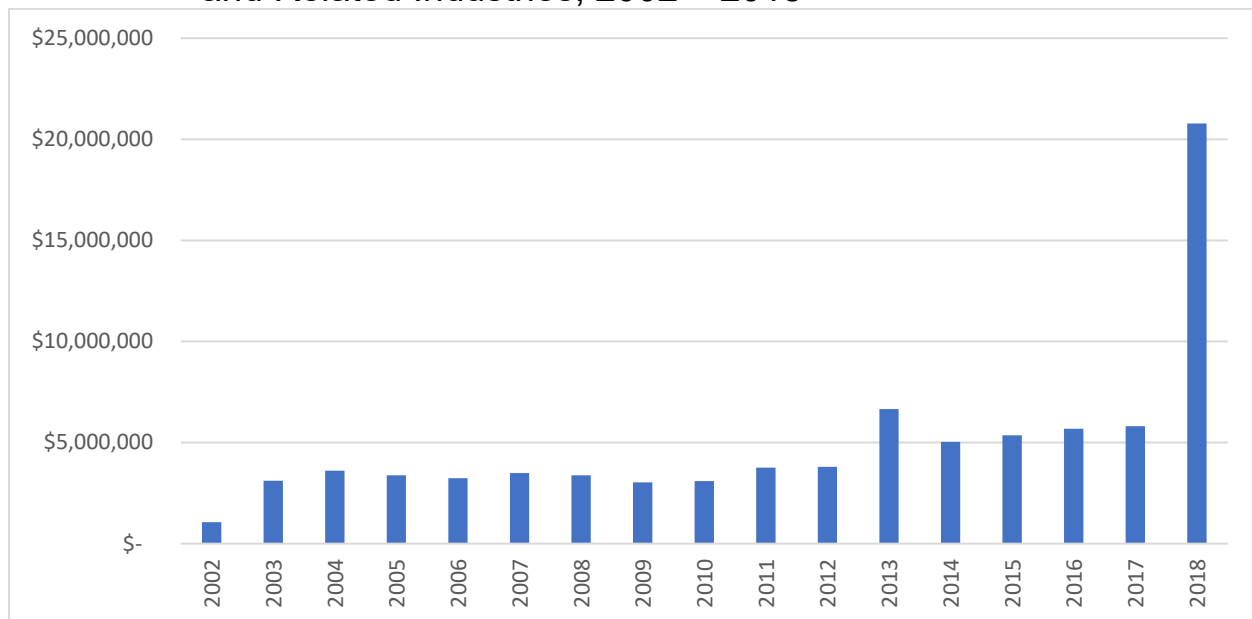
Graph 92: ZIP 66111, Average Number of Employees, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 92 shows a general decline in the number of employees in the performing arts, spectator sports, and related industries from 2003 to 2010 for ZIP code 66111. This decline is followed by an increase that almost doubles the number of employees by 2018.

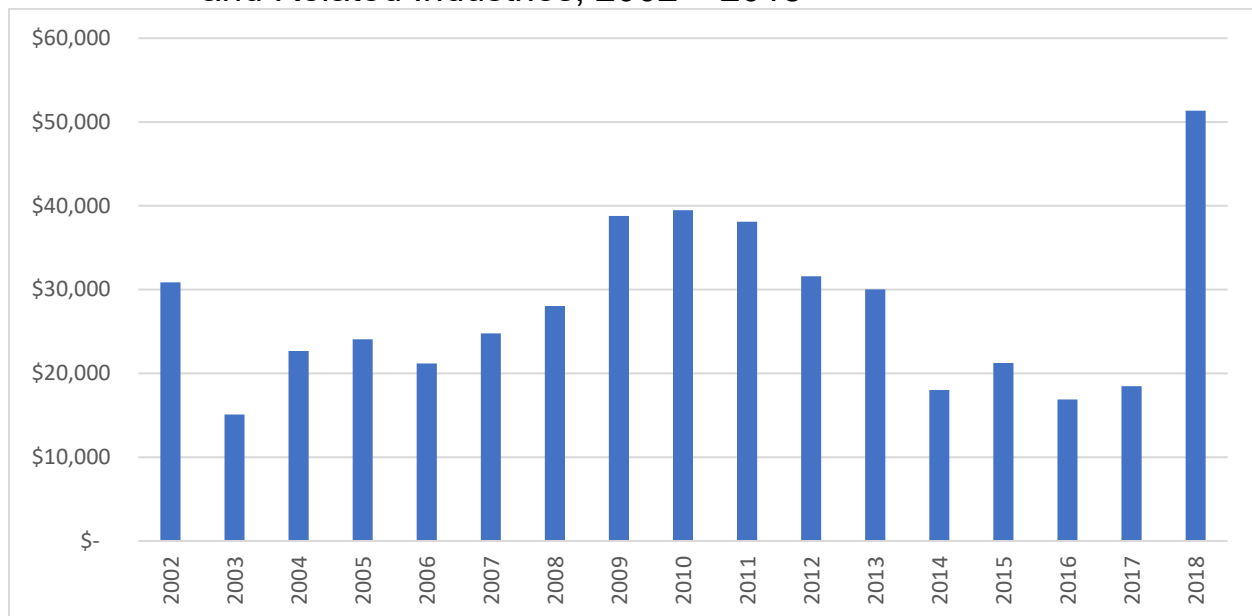
Graph 93: ZIP 66111, Total Wages, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 93 shows that total wages for this sector were relatively stable with the exception of 2018. The reason for the anomaly in 2018 cannot be determined from the data.

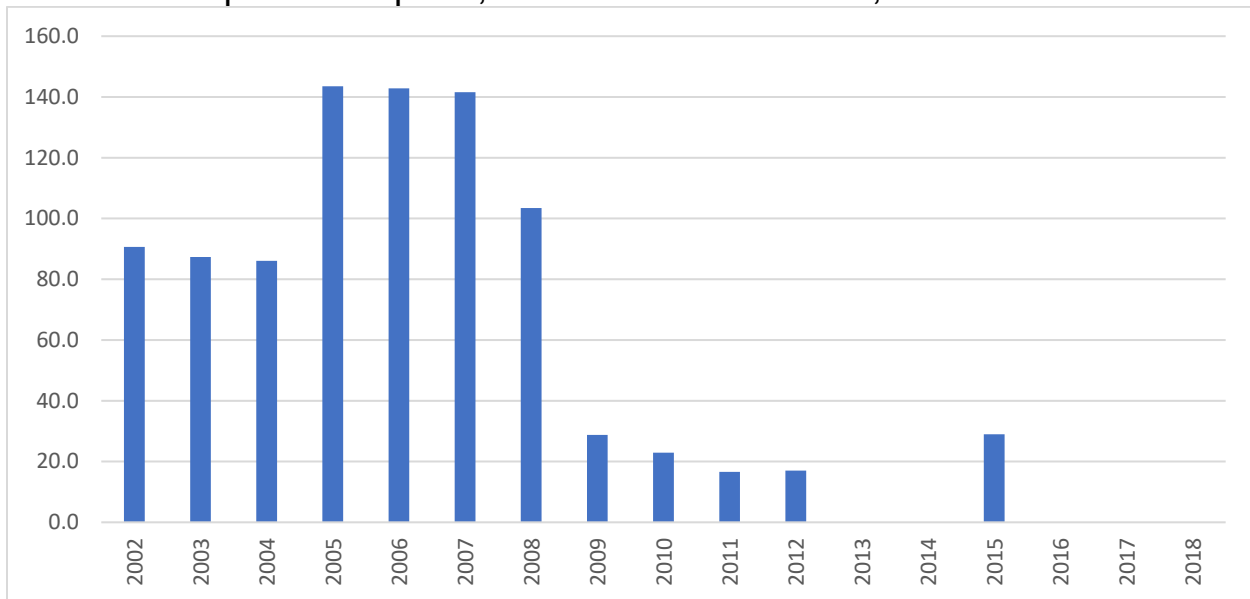
Graph 94: ZIP 66111, Average Wage, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 94 seems to suggest that the amount of work in these areas remained constant, but the number of employees changed and so the average wage changed inversely.

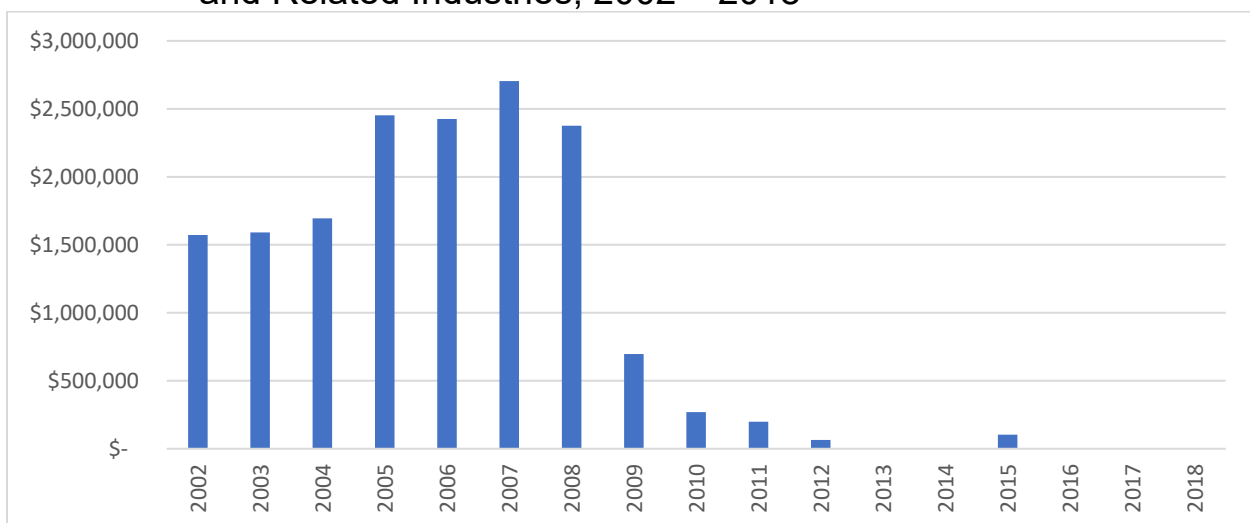
**Graph 95: ZIP 66109, Average Number of Employees, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 95 shows that the number of employees in the performing arts, spectator sports, and related industries decreased significantly after 2008 in ZIP 66109. Since 2012, there was only one year with employment.

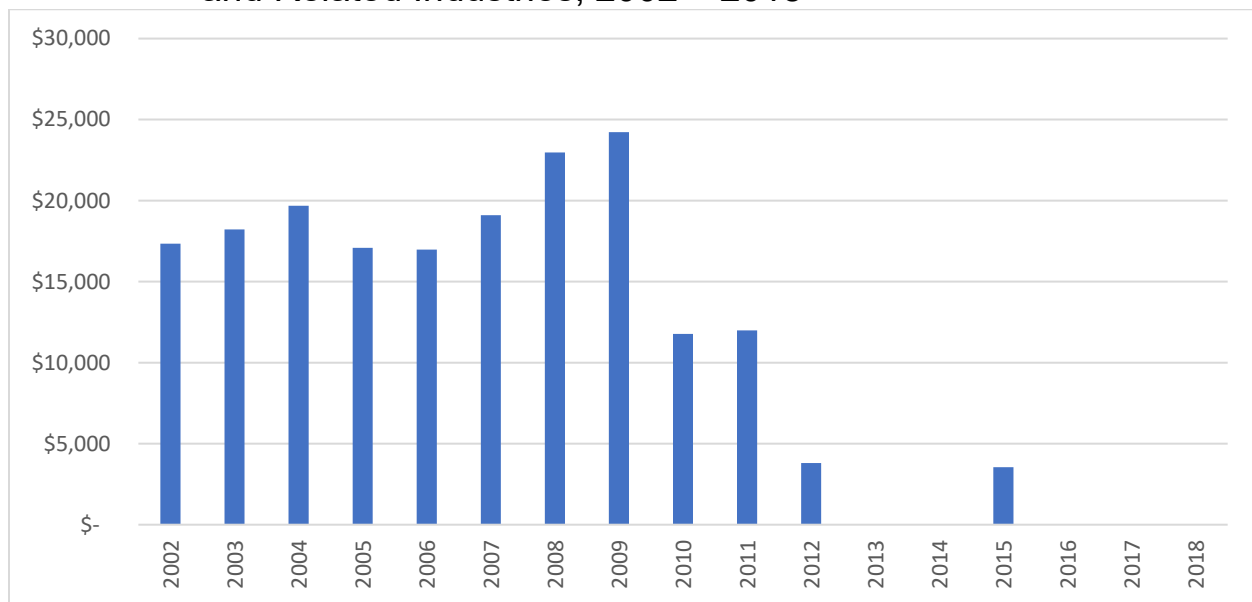
**Graph 96: ZIP 66109, Total Wages, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

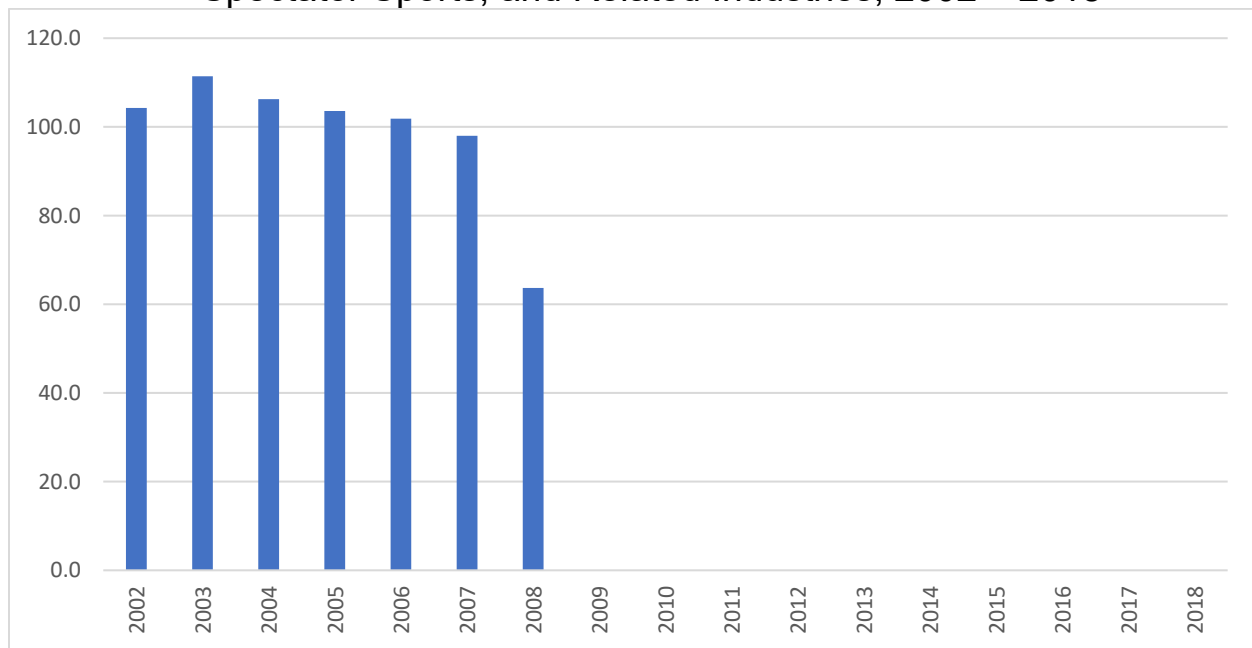
Tables 96 and 97 repeat the employment pattern since total wages and average wage depend upon the number of employees.

**Graph 97: ZIP 66109, Average Wage, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 98: ZIP 66112, Average Number of Employees, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018

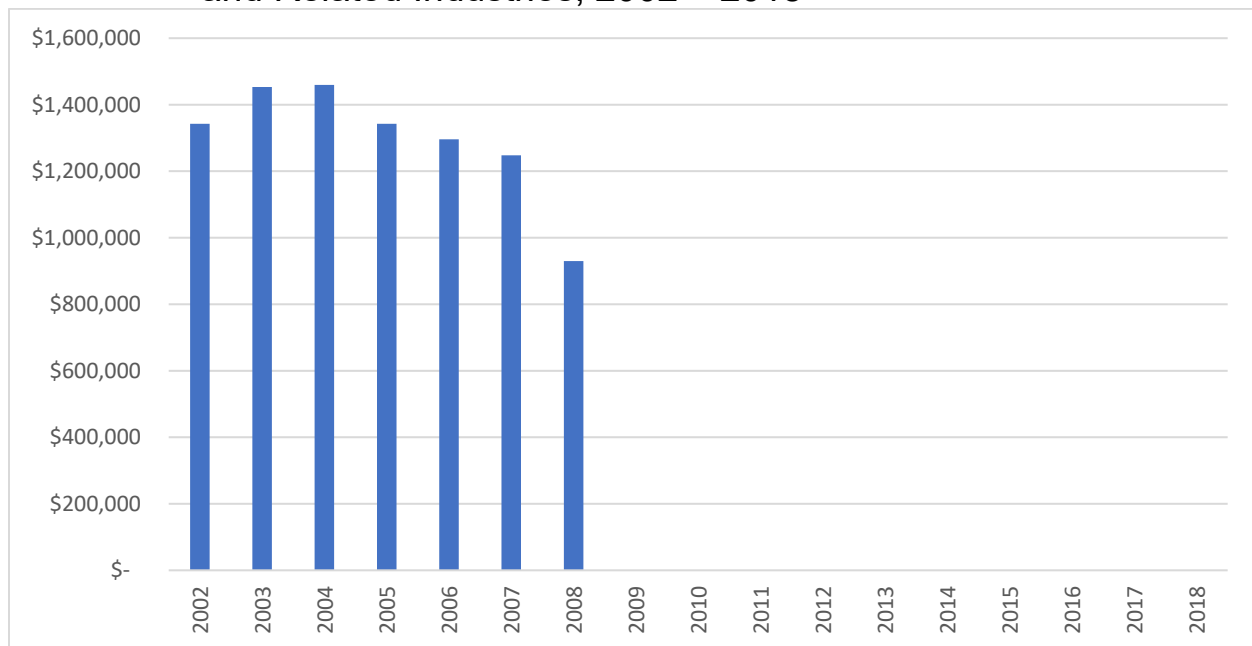


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 98 through 100 show that a similar pattern occurred in ZIP code 66112 although the collapse in employment was sharper and more complete than in the other two ZIP code areas.

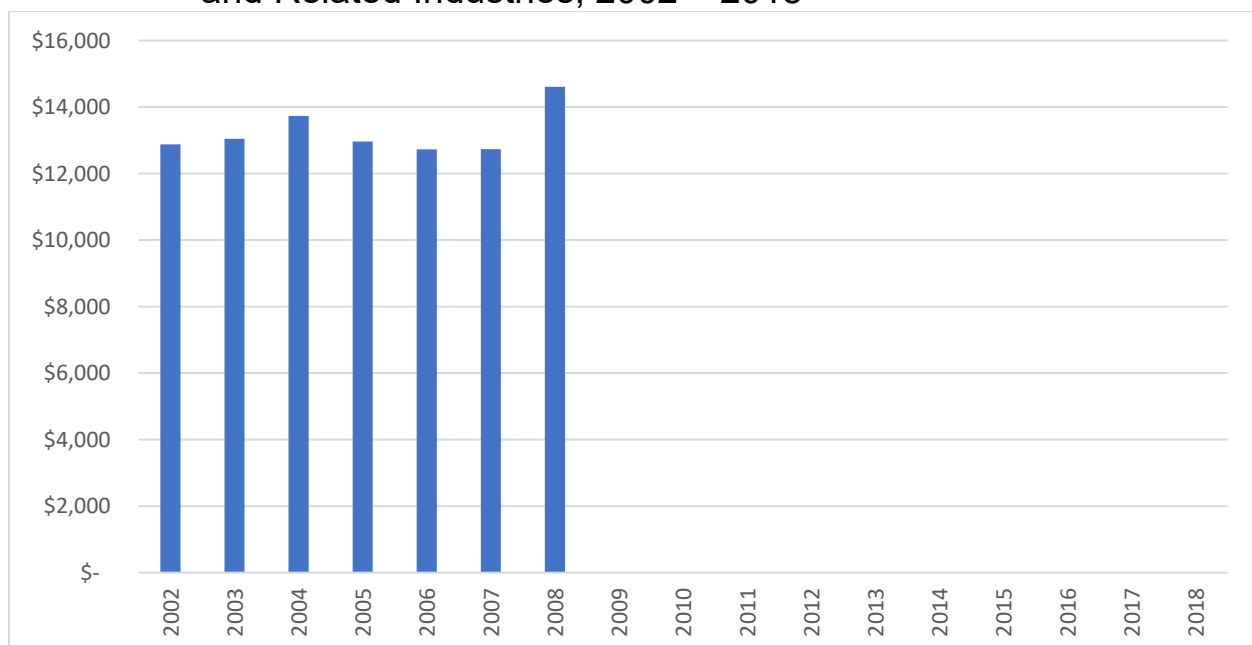


**Graph 99: ZIP 66112, Total Wages, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

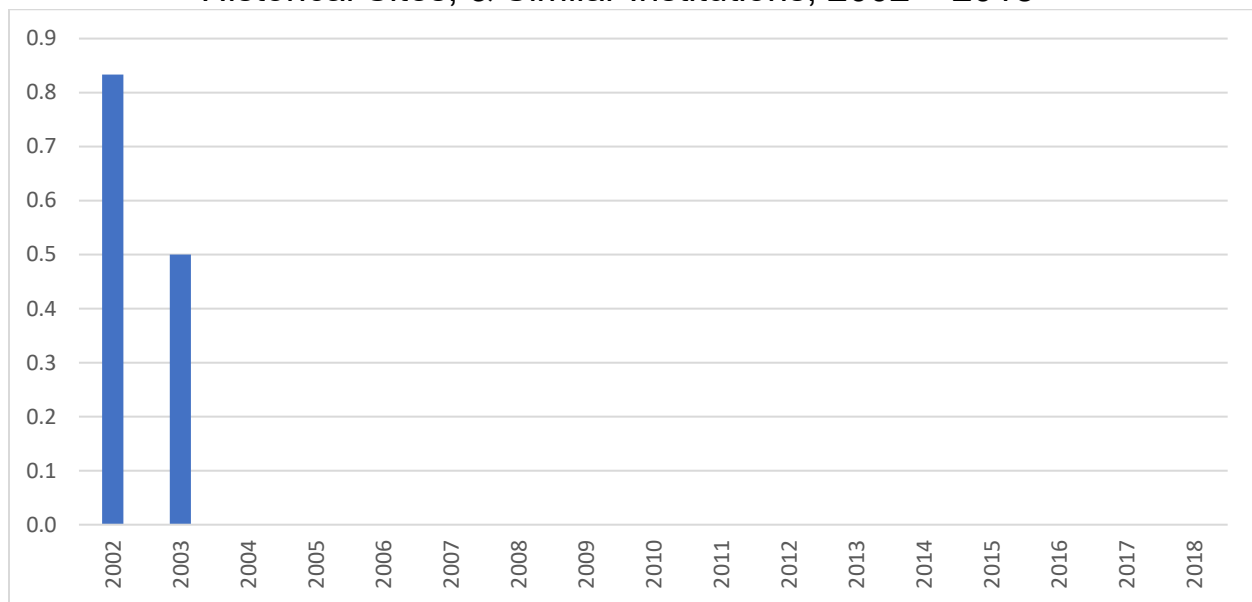
**Graph 100: ZIP 66112, Average Wage, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

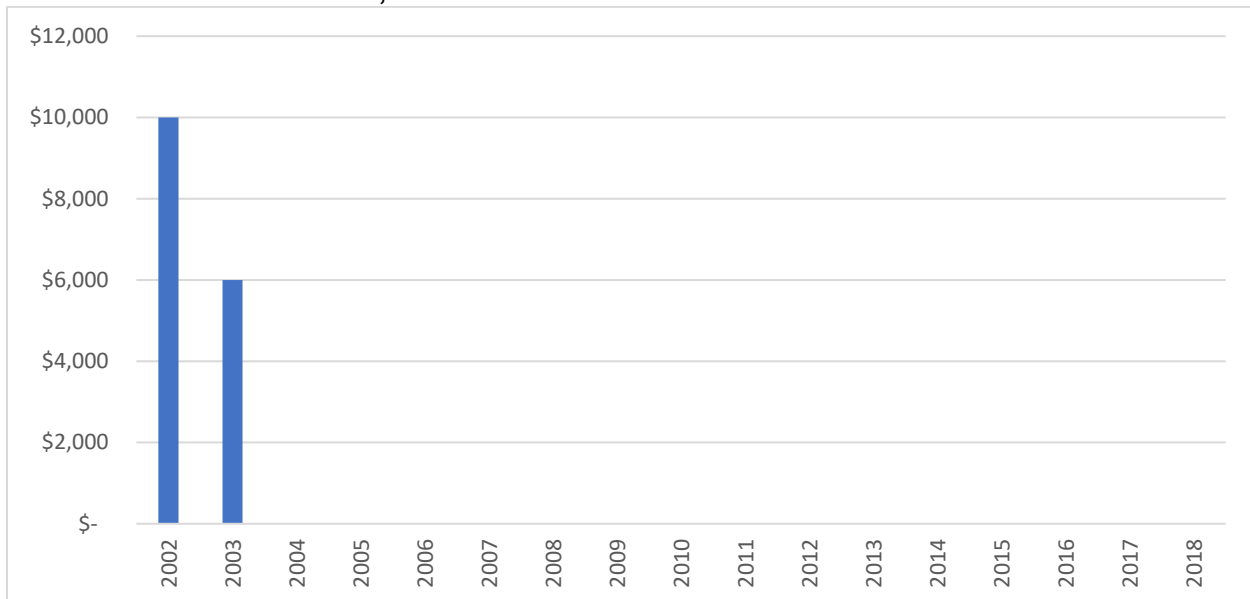
There were no museums, historical sites, and similar institutions employees in either ZIP code 66111 or 66112 for the period. Graphs 101 through 103 show the only employment was a part-time person during 2002 and 2003.

**Graph 101: ZIP 66109, Average Number of Employees, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



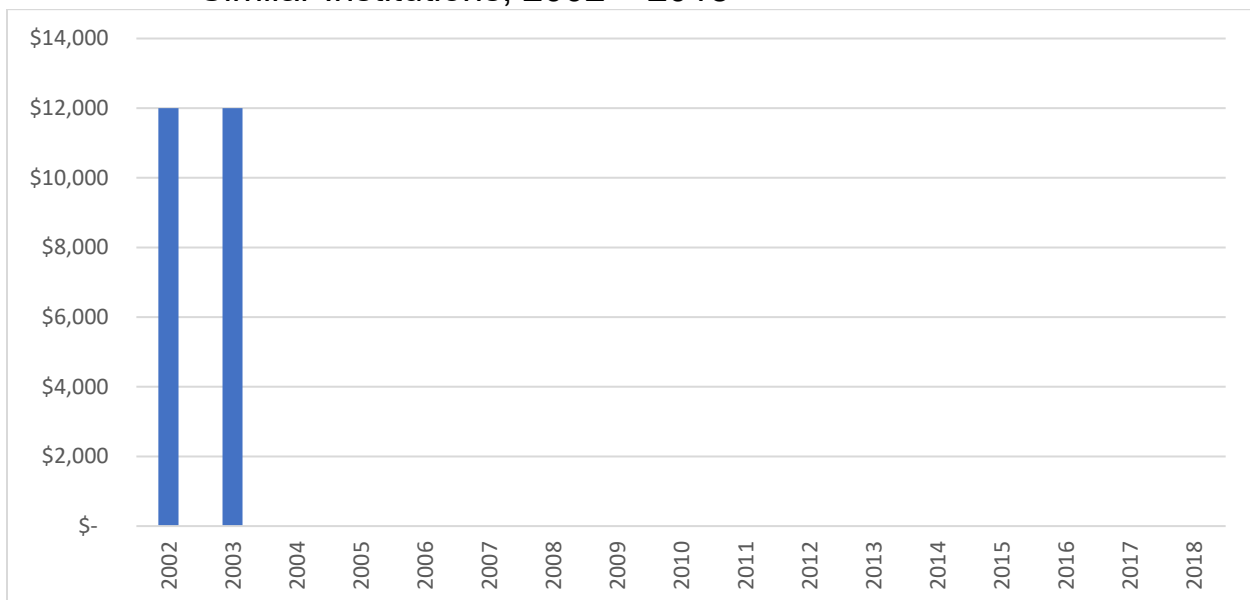
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 102: ZIP 66109, Total Wages, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



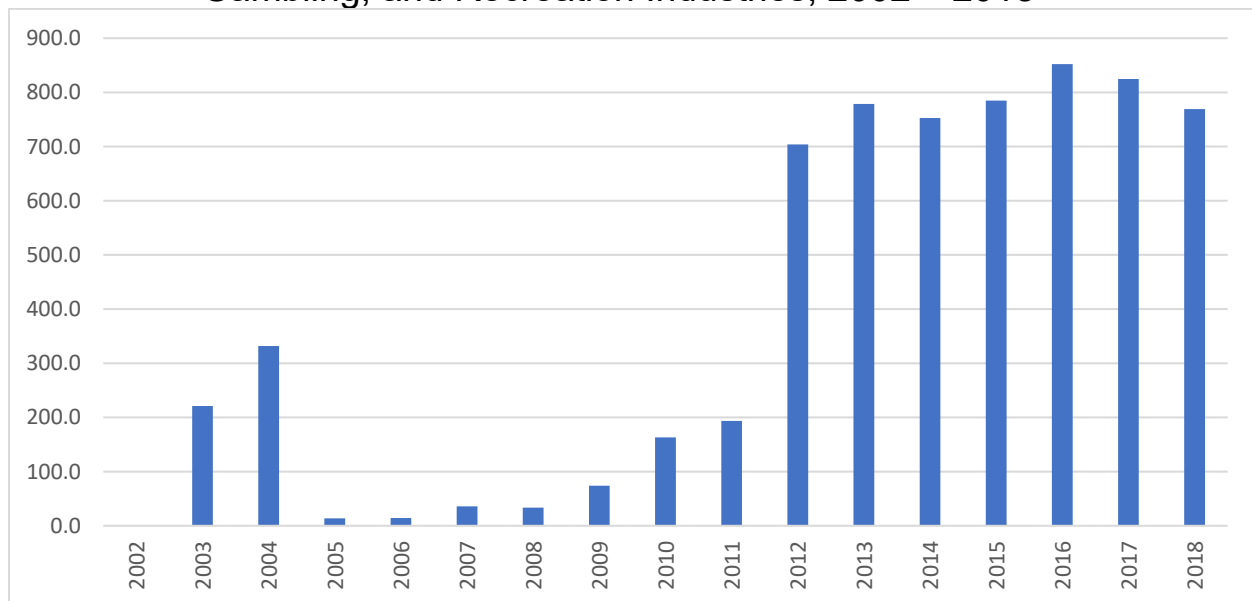
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 103: ZIP 66109, Average Wage, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

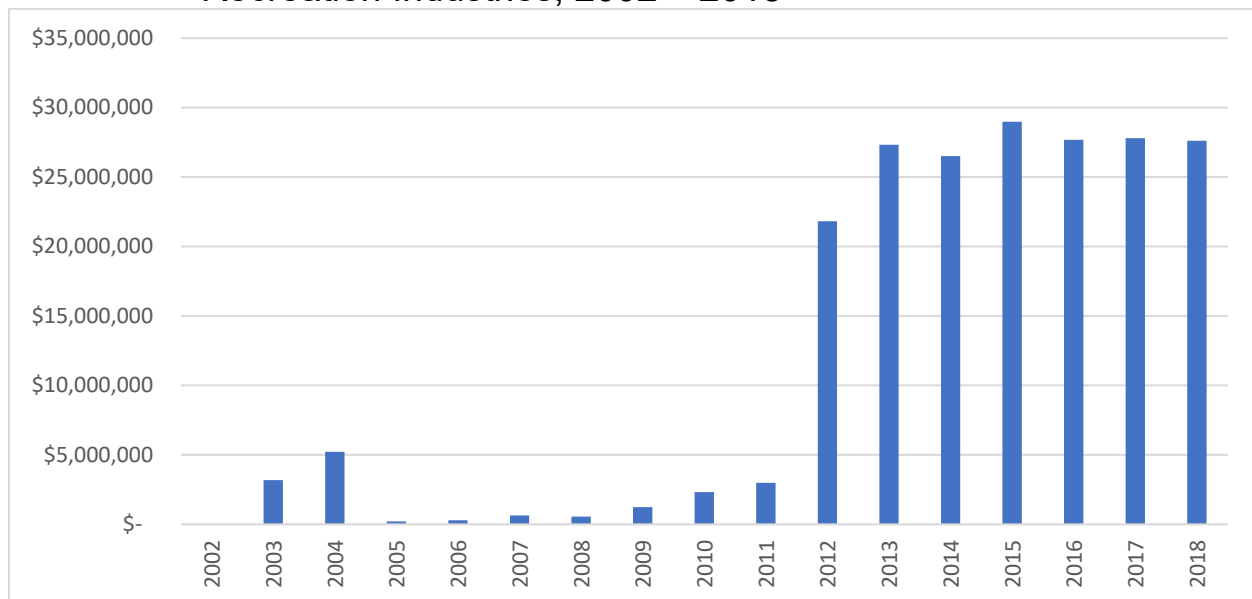
Graph 104: ZIP 66111, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 104 shows that in ZIP code 66111 there was some sporadic employment through 2011 in the amusement, gambling, and recreation industries sector followed by a significant increase in 2012 that continued through 2018. Obviously a major attraction opened at this time.

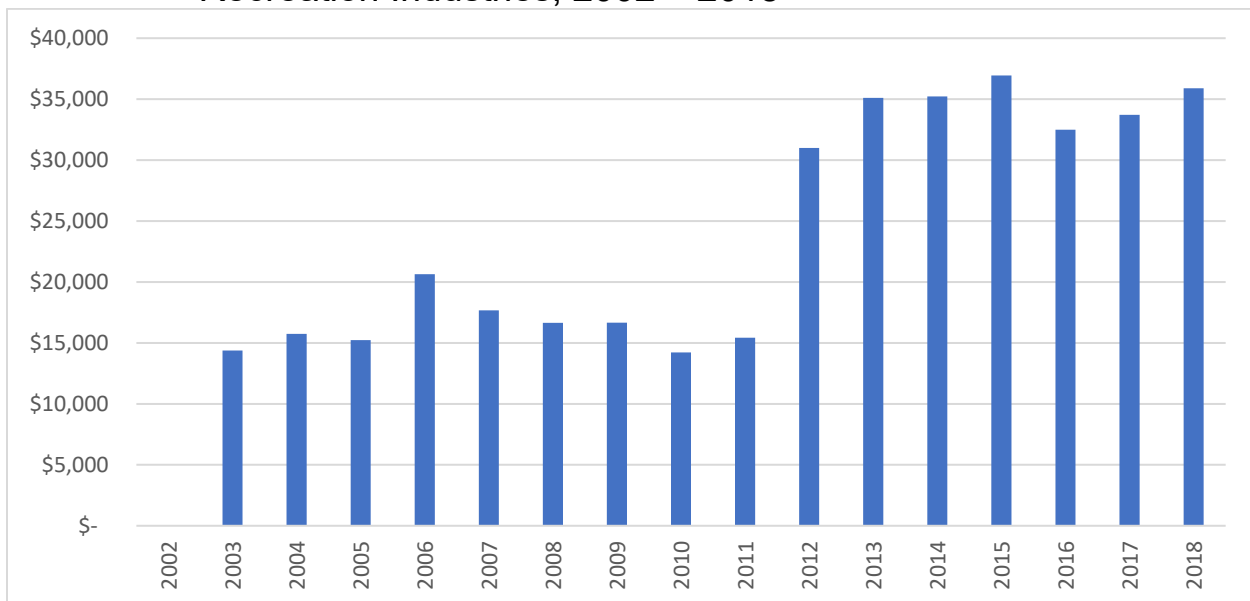
Graph 105: ZIP 66111, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 105 shows that the total wages paid to employees in the amusement, gambling, and recreation industries in ZIP code 66111 since 2012 are on average greater than \$25,000,000 per year. An investment of this scale requires a lot of customers if it is going to be profitable.

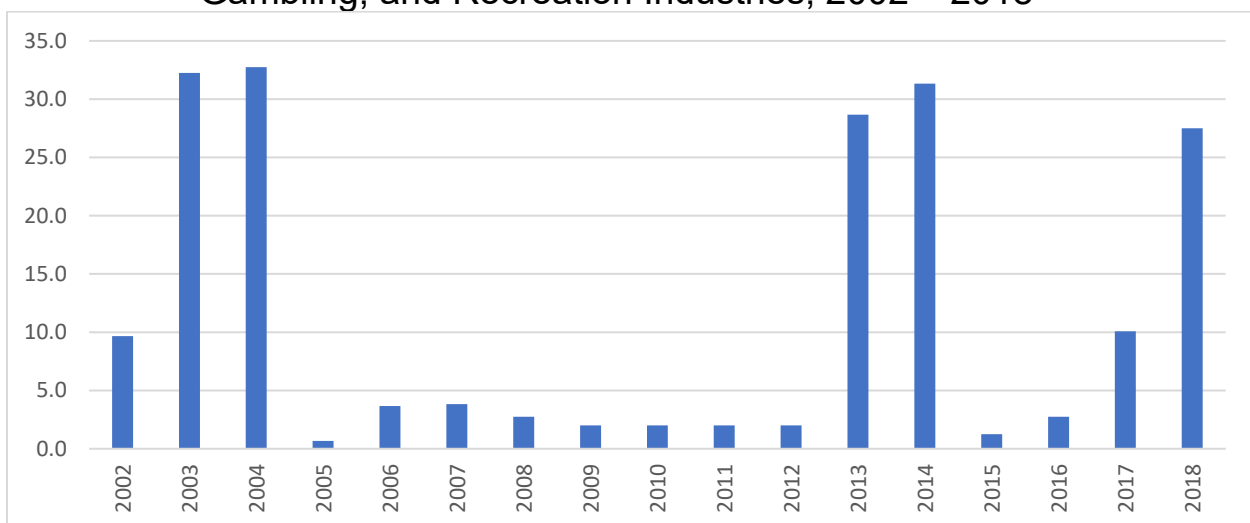
**Graph 106: ZIP 66111, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 106 shows that the average wage for employees in the amusement, gambling, and recreation industries in ZIP 66111 since 2012 is greater than \$30,000 per year or about double the level before 2012.

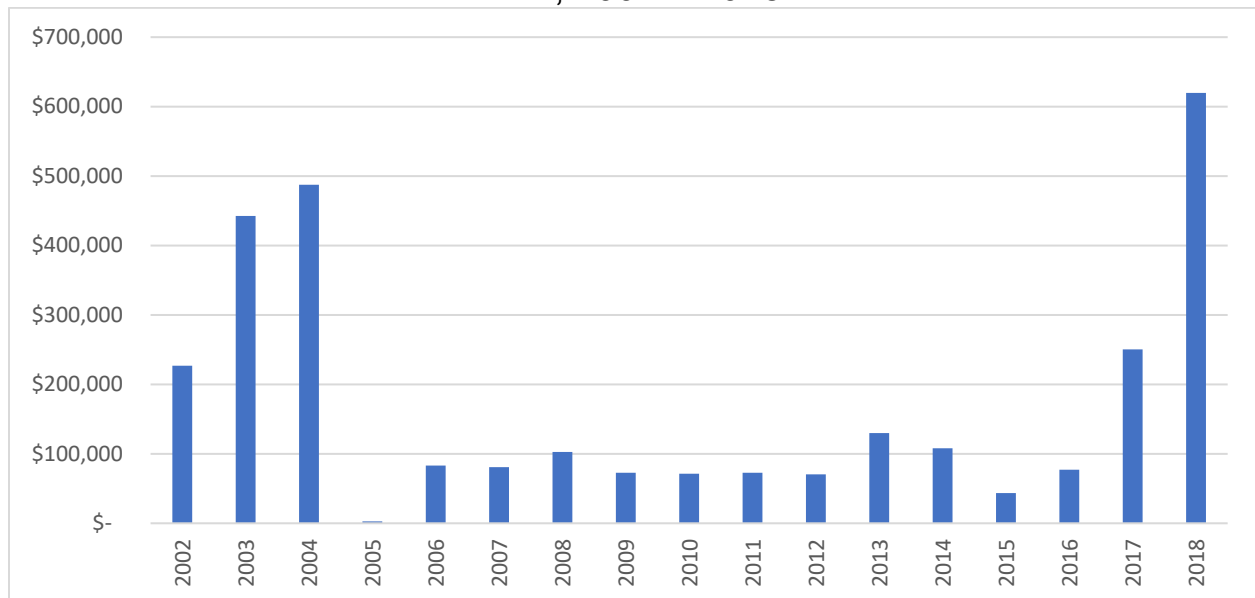
**Graph 107: ZIP 66109, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

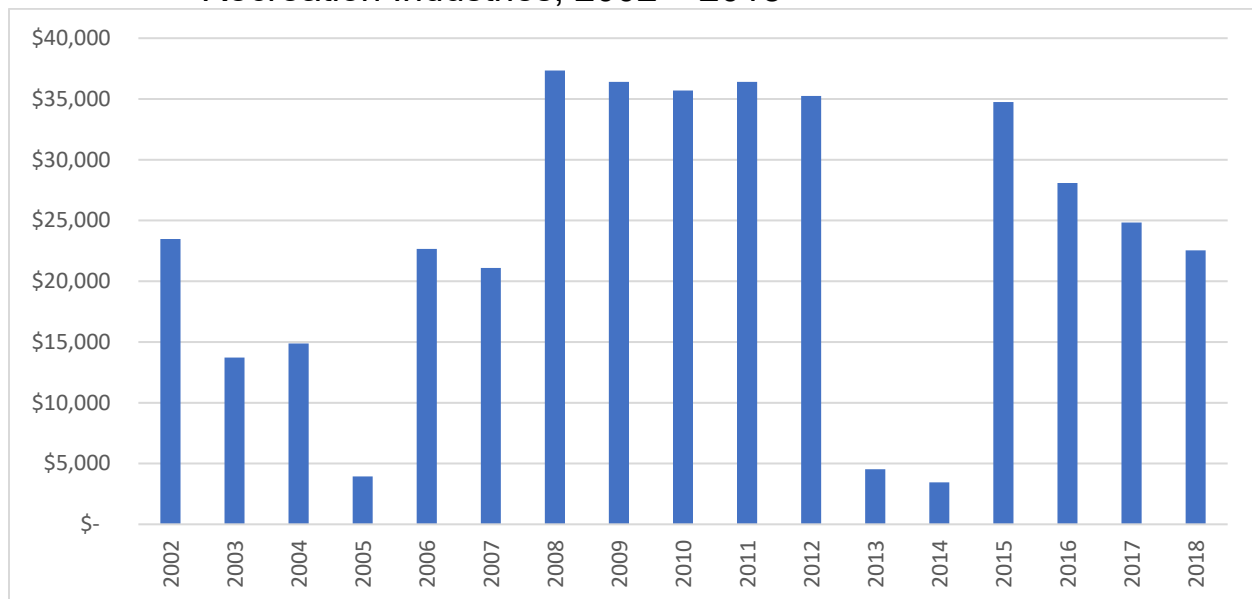
Graph 107 shows that in ZIP code 66109 the number of employees in amusement, gambling, and recreation industries fluctuates between about 30 employees and less than 5 employees. This does not appear to be a stable or significant economic driver in ZIP code 66109.

Graph 108: ZIP 66109, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018



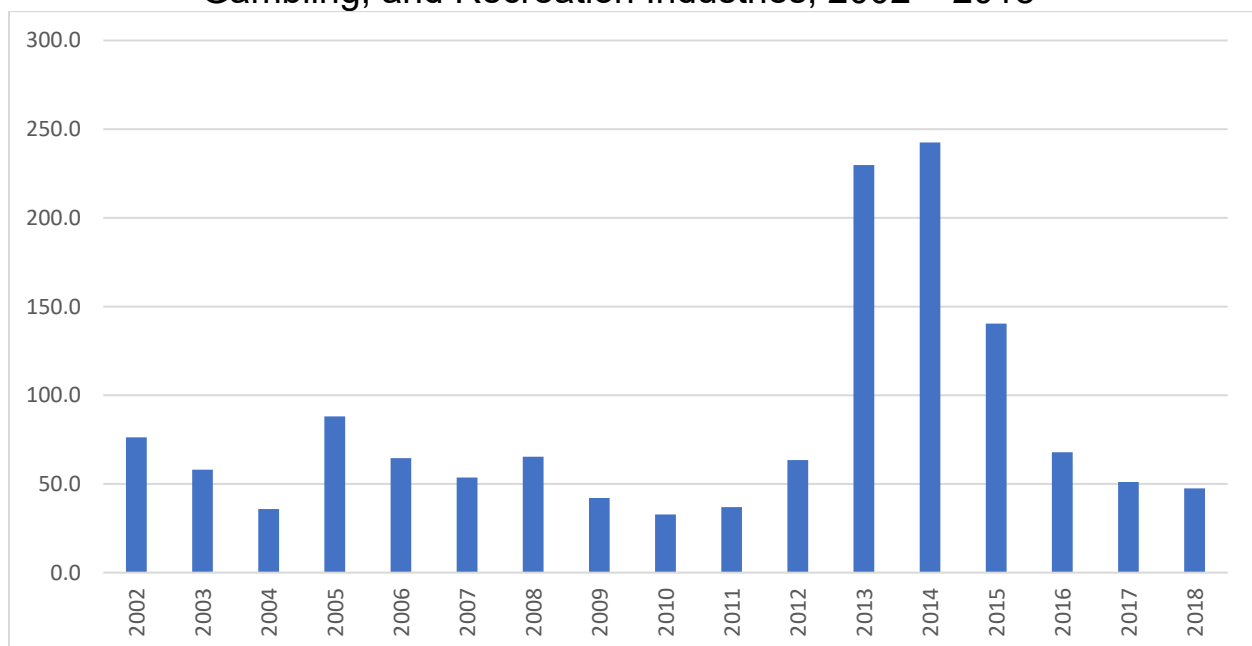
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 109: ZIP 66109, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

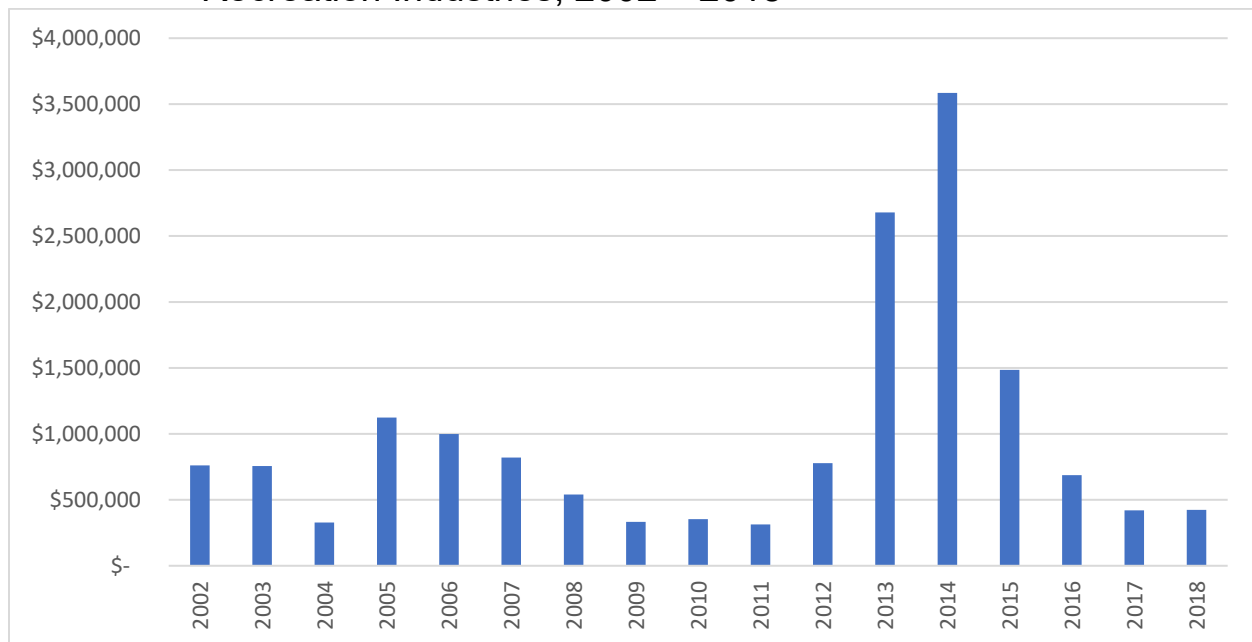
**Graph 110: ZIP 66112, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

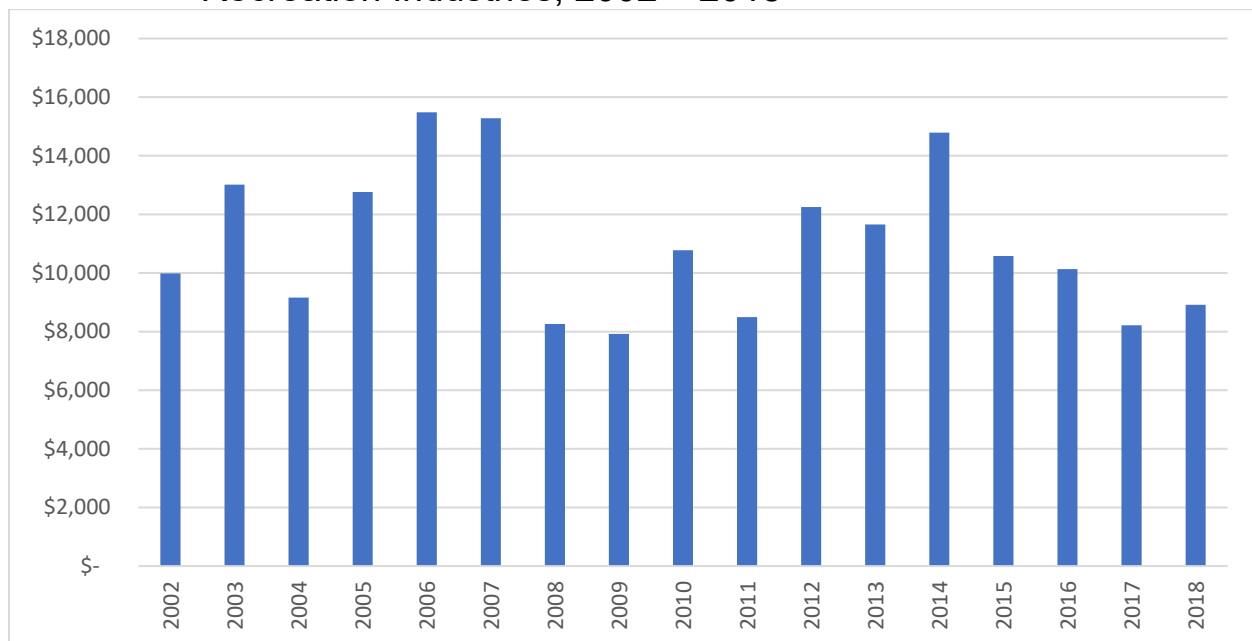


**Graph 111: ZIP 66112, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



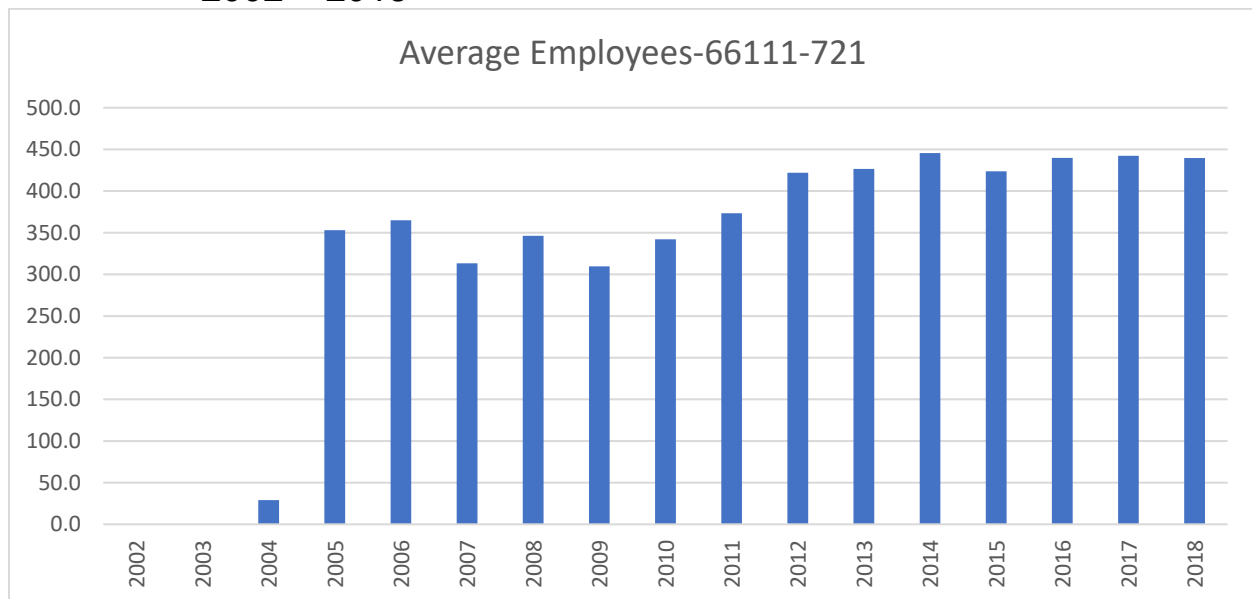
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 112: ZIP 66112, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

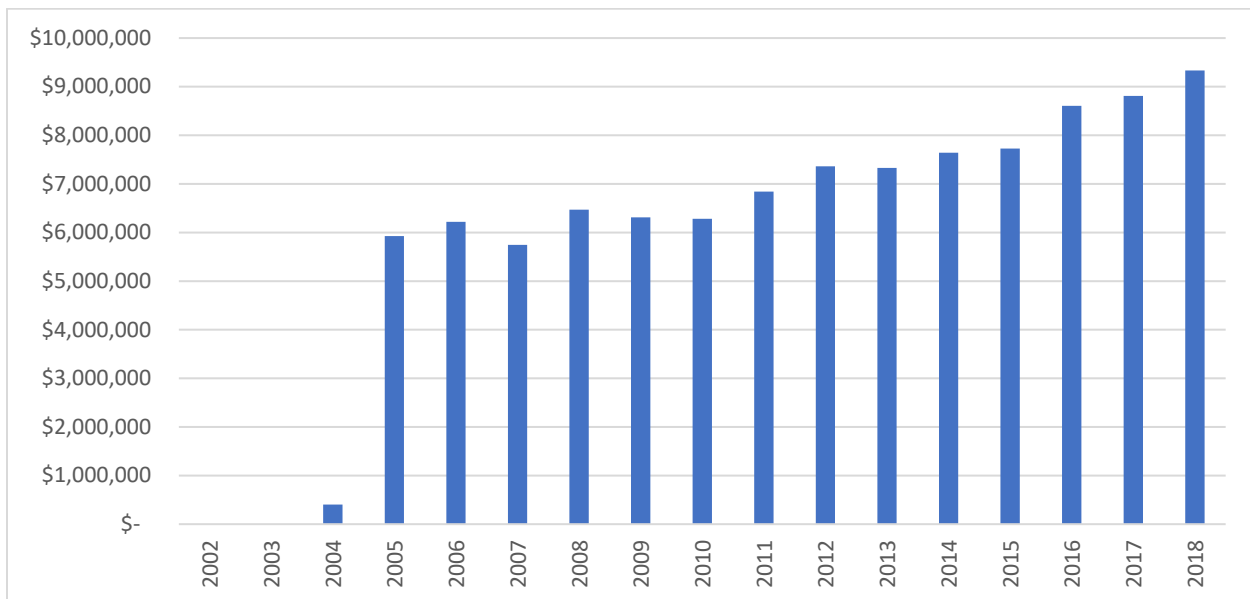
Graph 113: ZIP 66111, Average Number of Employees, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 113 shows that there were no accommodation employees in ZIP 66111 until 2004 and that 2005 saw a major increase in employees which has continued through 2018.

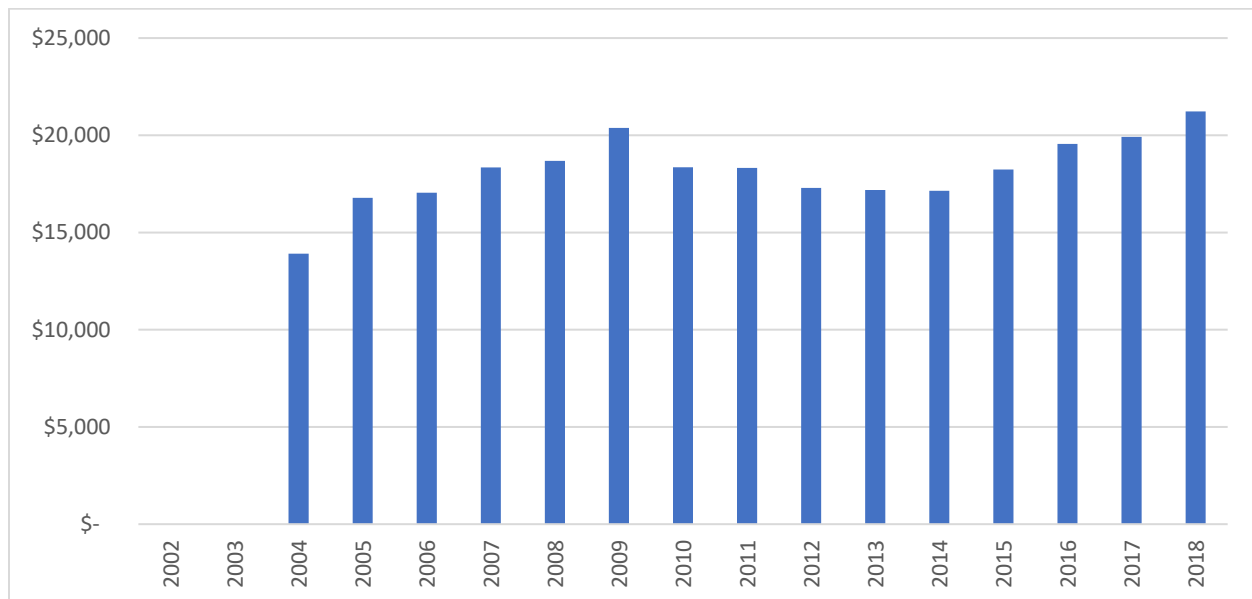
Graph 114: ZIP 66111, Total Wages, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 114 reflects the increase in total wages that results from the increase in the number of employees in the accommodation sector in ZIP 66111.

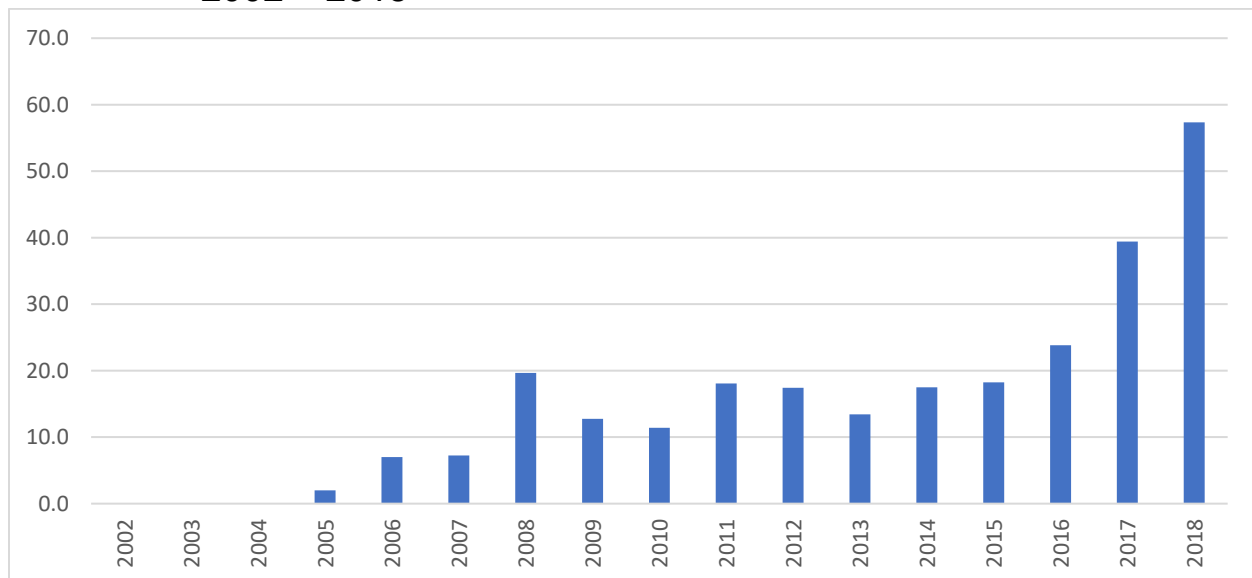
Graph 115: ZIP 66111, Average Wage, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

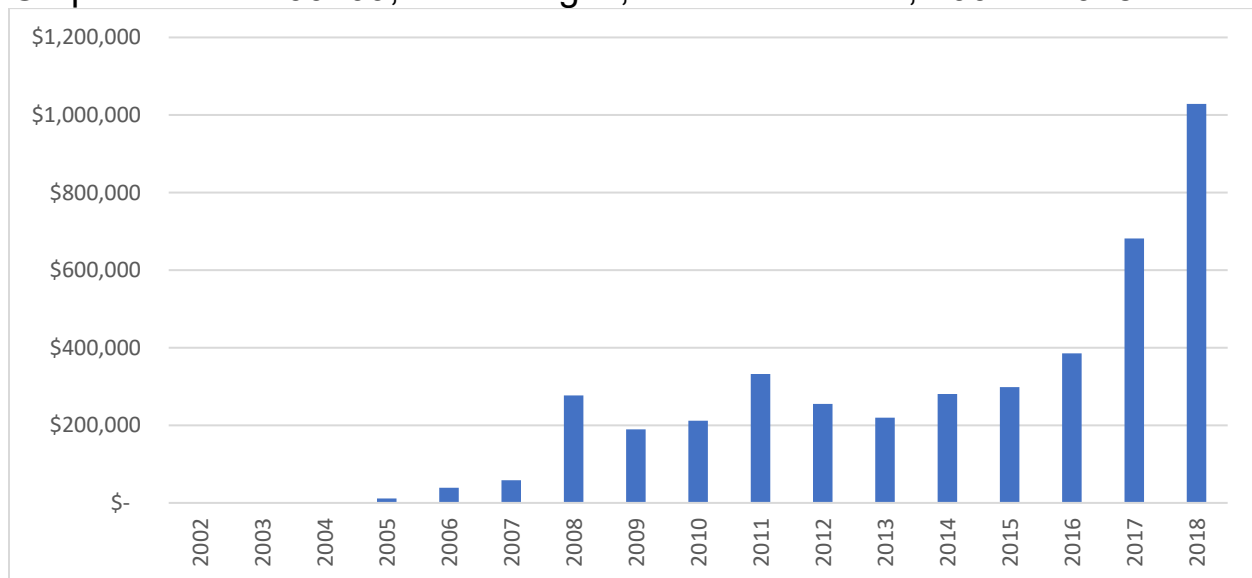
Graphs 116 through 118 show that in ZIP 66109 the number of employees and the total wages for accommodation works began in 2005. From 2008 through 2015 the number of employees fluctuated in the range of 11 to 20 employees. By 2018, the number of employees was approaching 60 employees and total wages were over \$1,000,000.

**Graph 116: ZIP 66109, Average Number of Employees, Accommodation, 2002 – 2018**



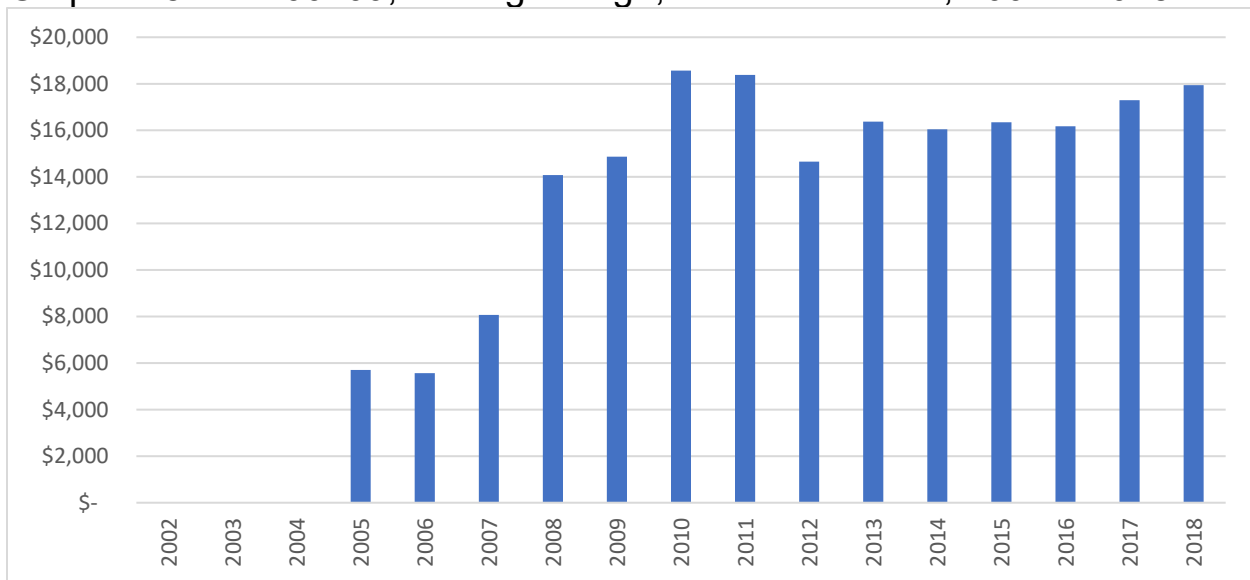
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 117: ZIP 66109, Total Wages, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

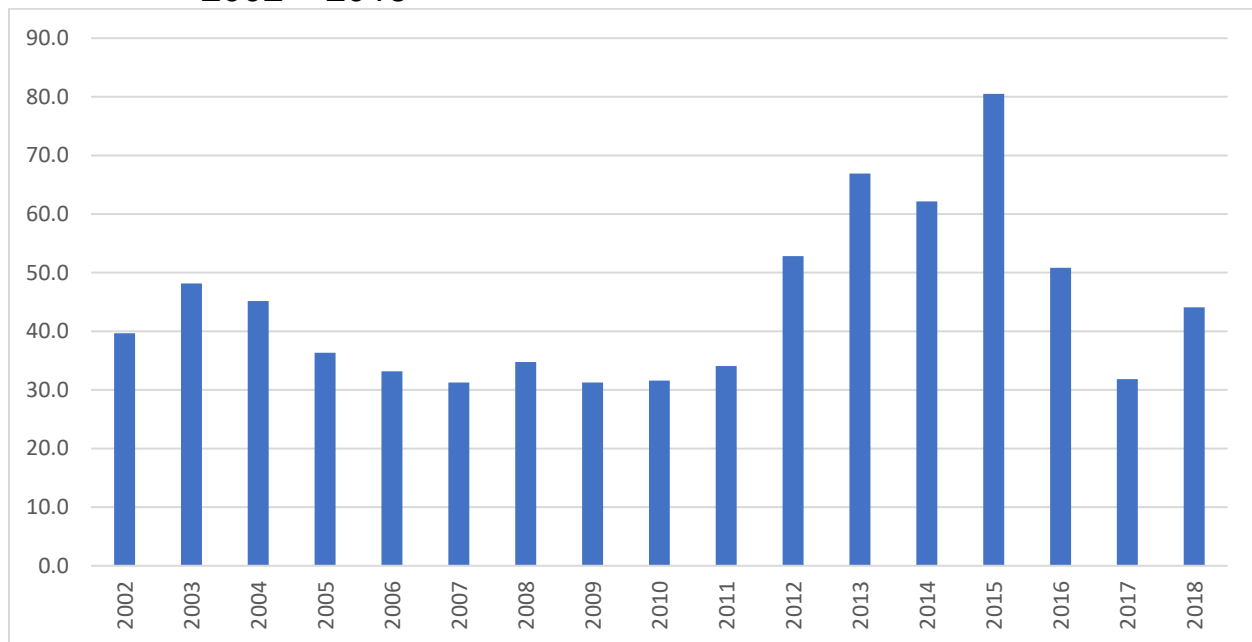
Graph 118: ZIP 66109, Average Wage, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

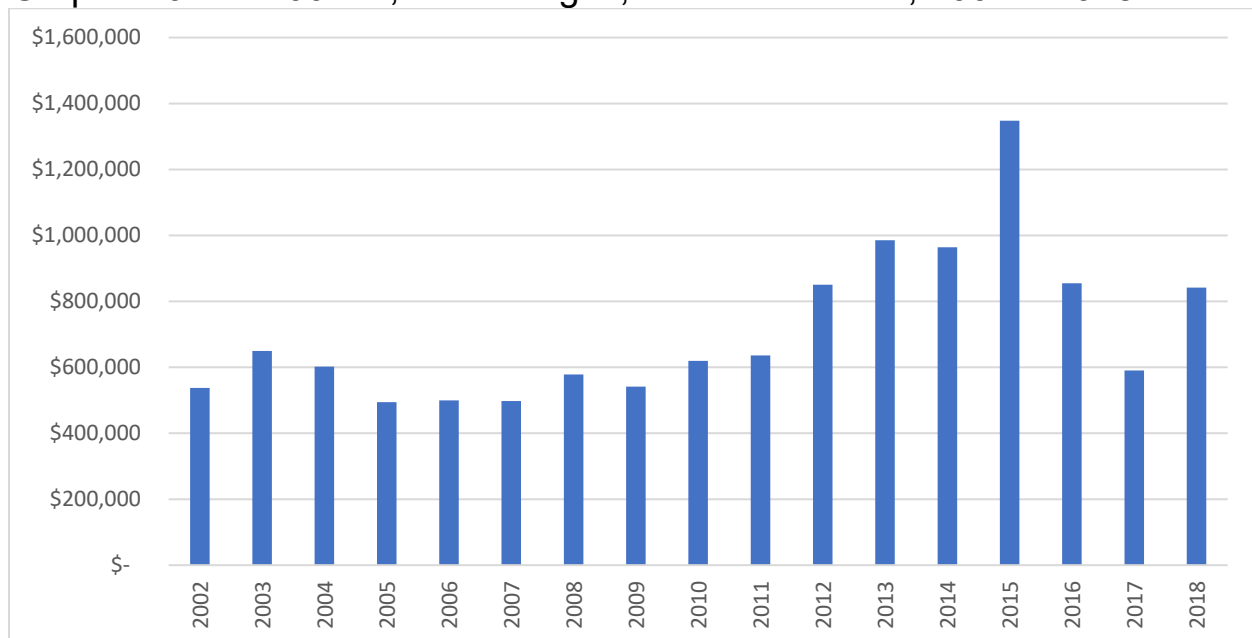
Graph 119 through 121 show that in ZIP 66112 there was an increase in the number of employees in accommodation between 2012 and 2015. This was accompanied by an increase in total wages for these employees. However, from 2016 both number of employees and total wages have declined.

Graph 119: ZIP 66112, Average Number of Employees, Accommodation, 2002 – 2018



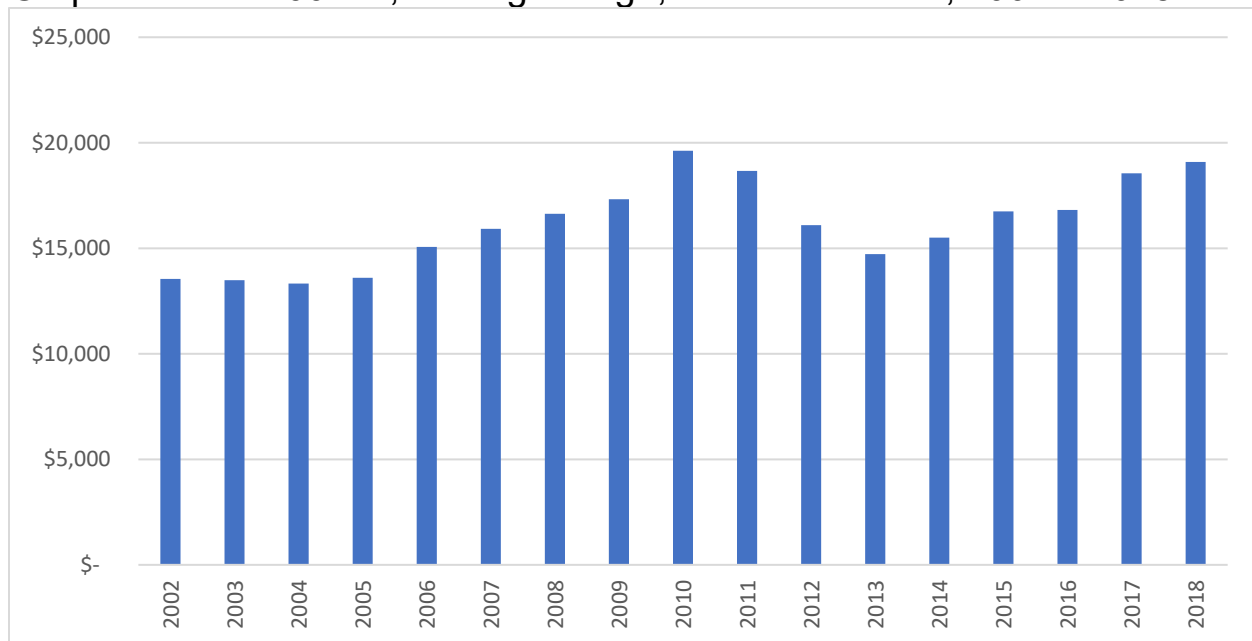
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 120: ZIP 66112, Total Wages, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 121: ZIP 66112, Average Wage, Accommodation, 2002 – 2018

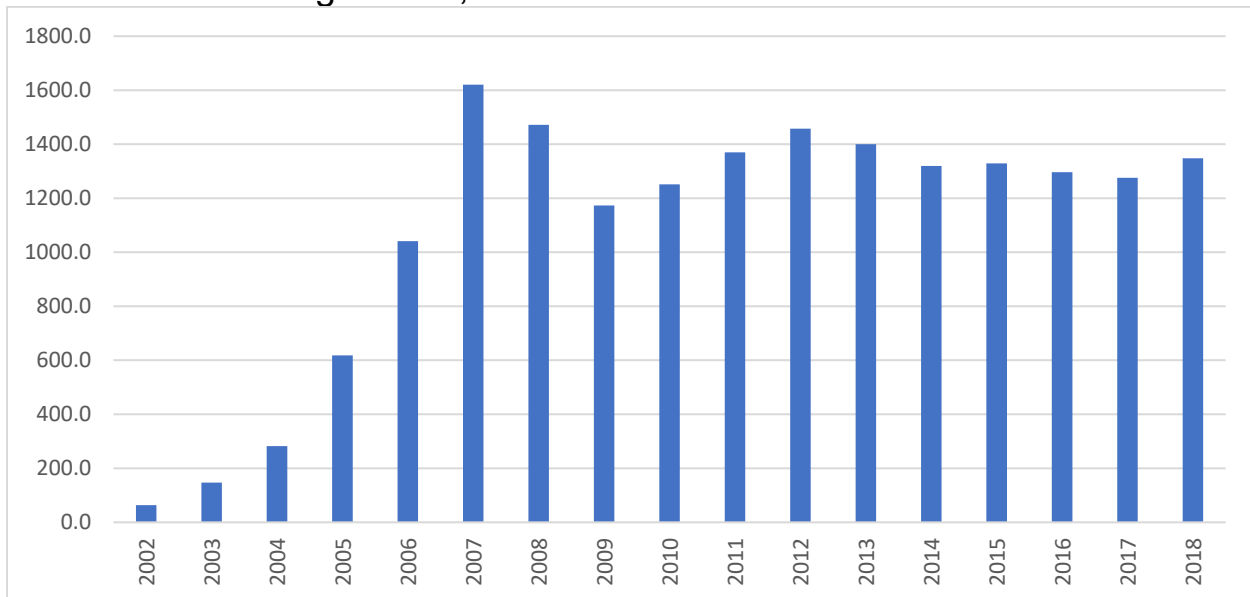


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 122 shows that the number of employees at food services and drinking places increased from almost zero to 1600 people from 2002 through 2007. Since 2007, the number of employees in ZIP 66111 at food services and drinking places has fluctuated between slightly more than 1400 people to slightly less than 1200 people. Total wages, Graph 123, for these employees was \$25,000,000 in 2018.

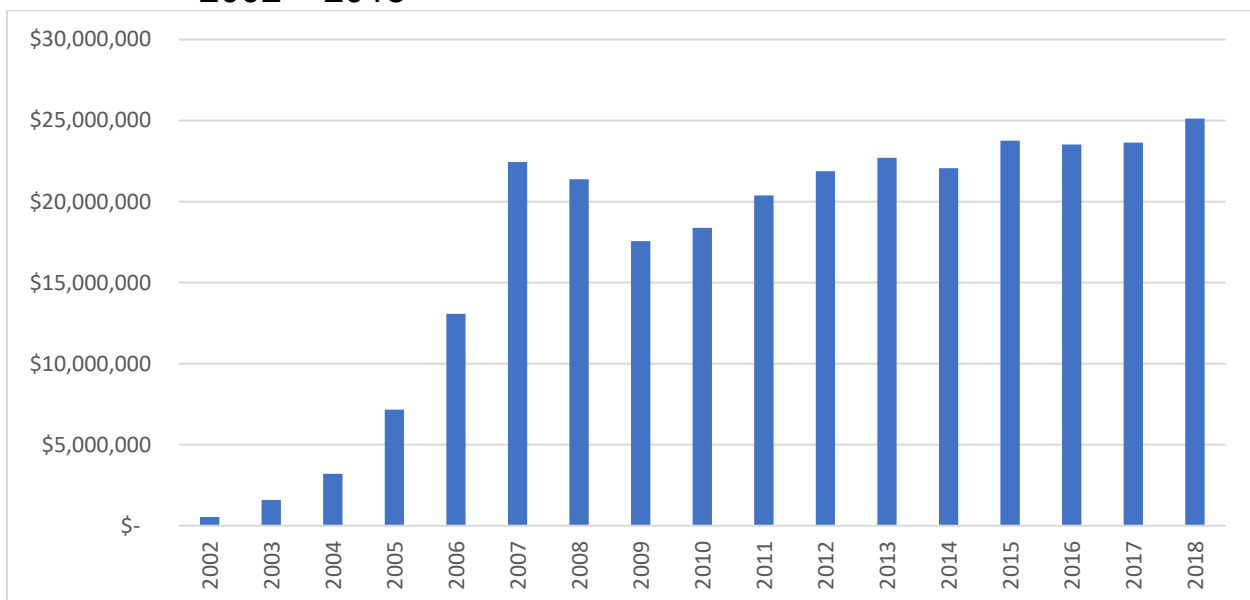


**Graph 122: ZIP 66111, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



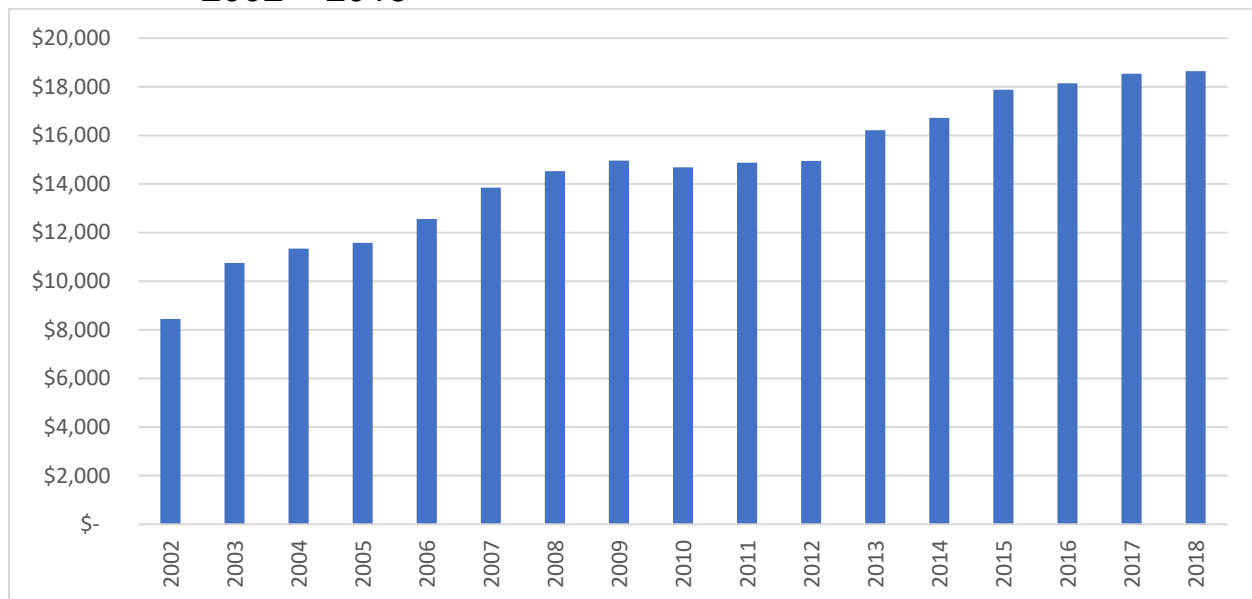
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 123: ZIP 66111, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

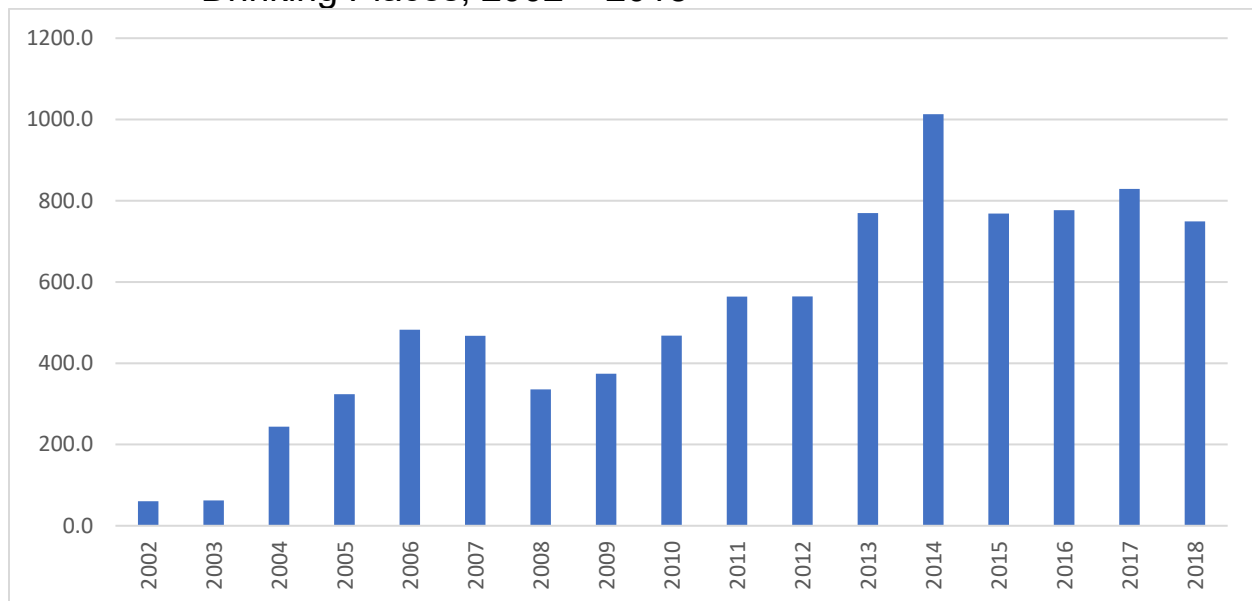
Graph 124: ZIP 66111, Average Wage, Food Services & Drinking Places, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

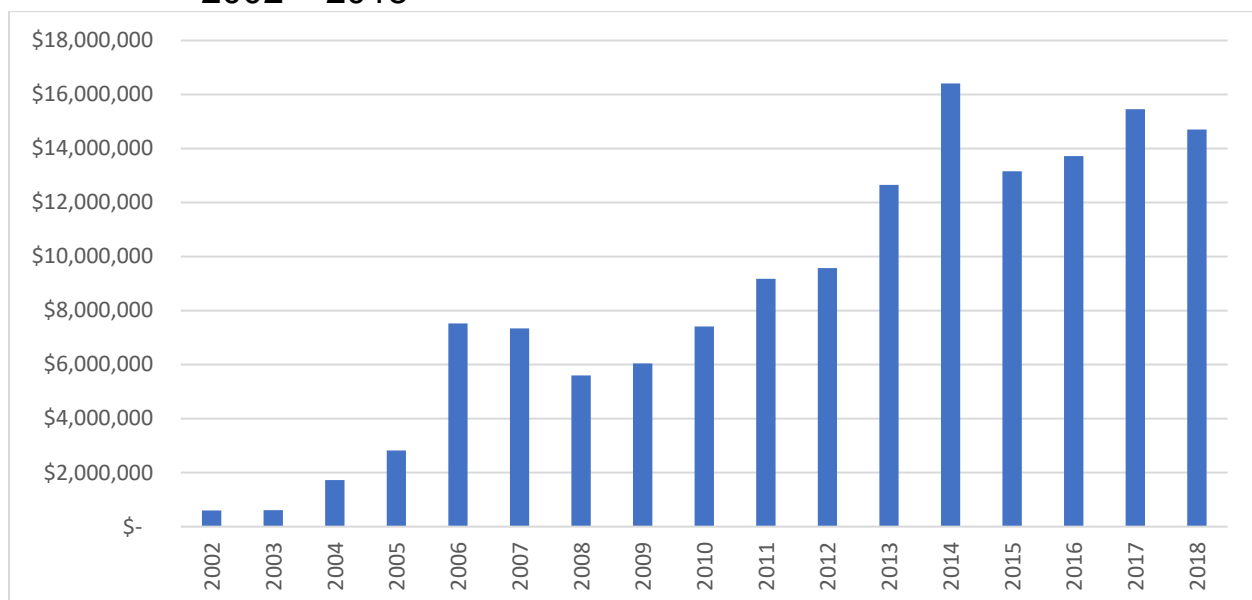
Graph 125 shows that in ZIP 66109 the number of employees at food services and drinking places has generally increased starting with about 60 employees in 2002 and ending with about 750 in 2018. Total wages for these employees in 2018 were over \$14,000,000.

**Graph 125: ZIP 66109, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



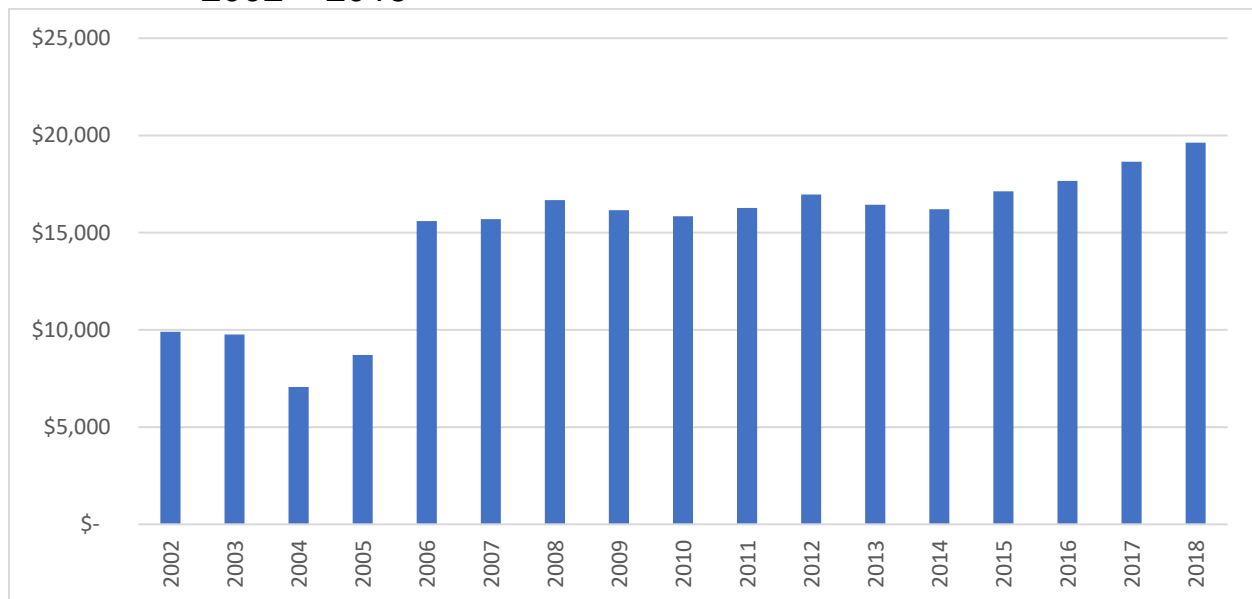
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 126: ZIP 66109, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

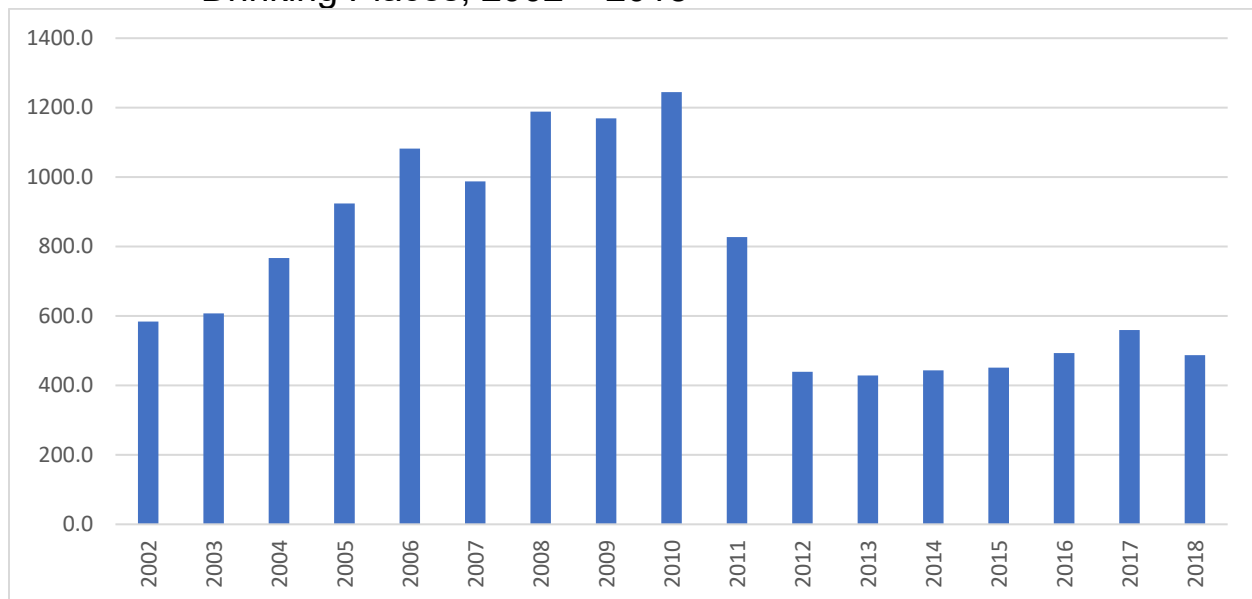
Graph 127: ZIP 66109, Average Wage, Food Services & Drinking Places, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

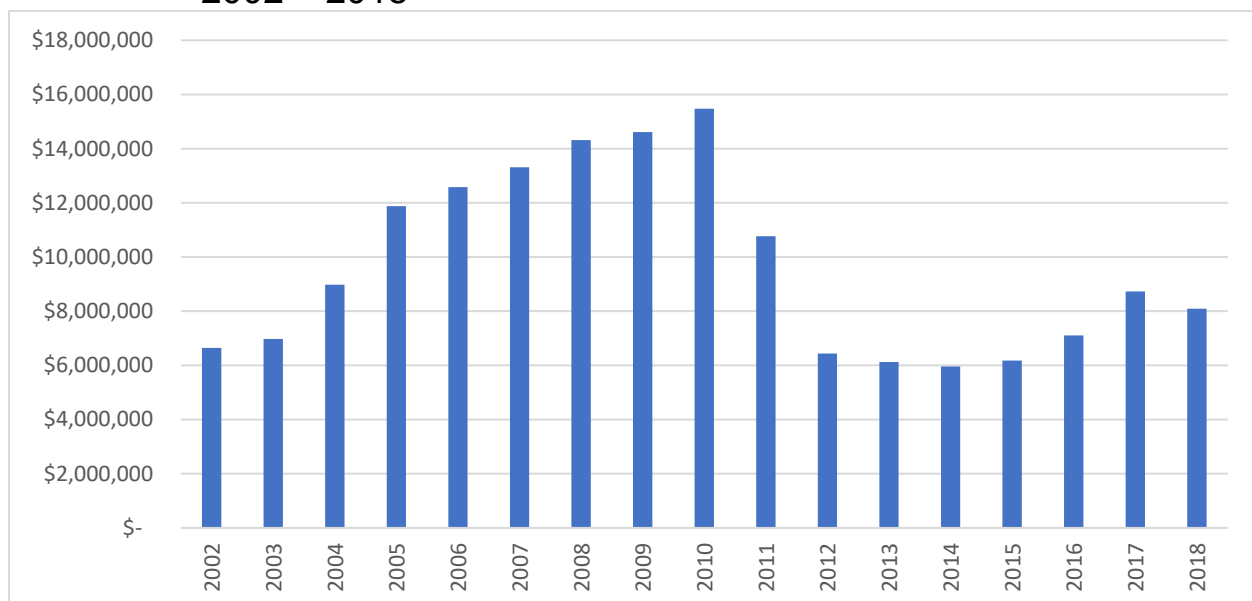
Graph 128 shows that in ZIP 66112 there were nearly 600 employees working at food services and drinking places in 2002. The number of employees increase steadily to more than 1200 employees by 2010. However, in 2011 and 2012 the number of employees dropped to slightly more than 400 people and the level of employment has remained below 600 since then. This pattern is repeated in Graph 129, Total Wages.

**Graph 128: ZIP 66112, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



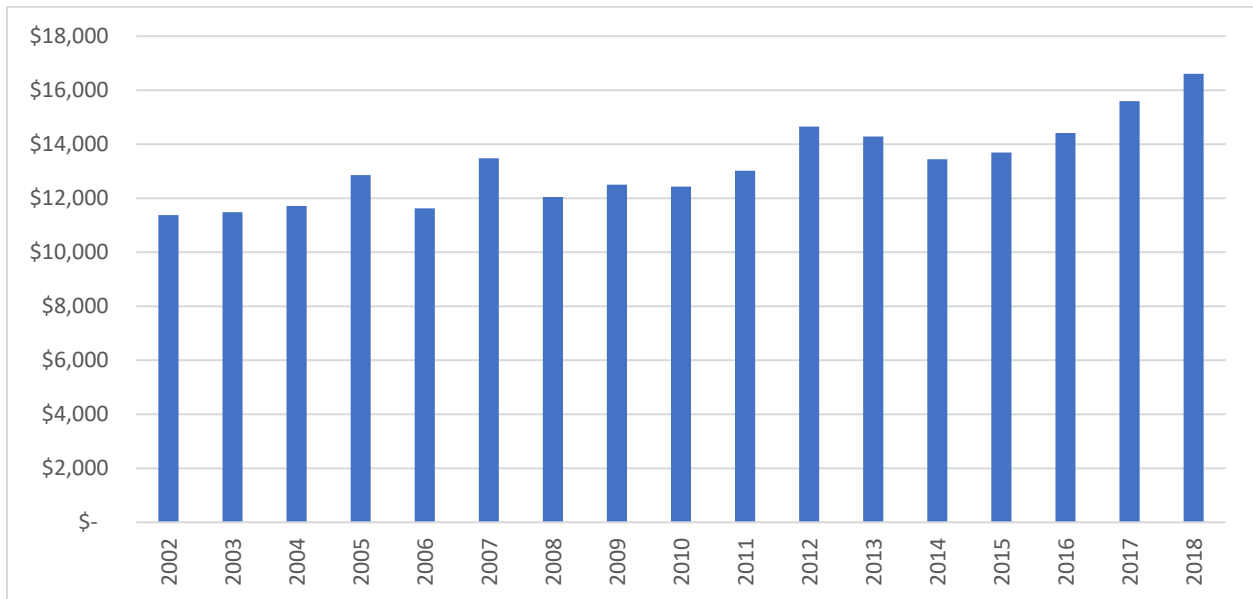
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 129: ZIP 66112, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 130: ZIP 66112, Average Wage, Food Services & Drinking Places, 2002 – 2018

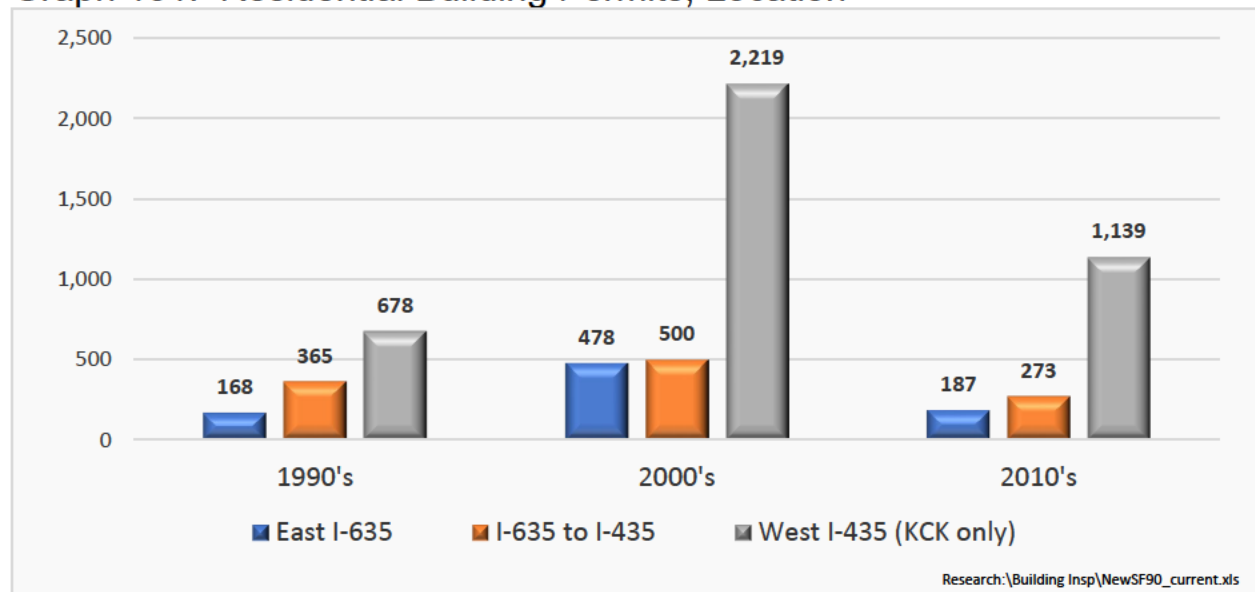


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

## Economic Activity Outside STAR Bond Districts

Graph 131 shows increased residential building has occurred west of I-435, which runs through the eastern edge of the STAR Bond districts in Wyandotte County. The permanent movement of people to an area is an indicator of greater economic opportunity.

Graph 131: Residential Building Permits, Location



Source: Wyandotte Unified Government

Table 18: Residential Permits Issued by Area

	<b><i>Residential Permits Issued by Area of County (KCK Only)</i></b>		
	East I-635	I-635 to I-435	West I-435 (KCK only)
1990's	168	365	678
2000's	478	500	2219
2010's	187	273	1139

Source: Wyandotte Unified Government

## Property Taxes Associated Redevelopment Districts

Real property taxes levied for the period 1998 through 2019 for the eight project areas in the Prairie Delaware and Vacation Village Redevelopment Areas were \$ 211,506,532. This represents real tax revenue for local units of government.

General real property taxes levied for the period 2012 through 2020 for the two project areas in the Northwest Speedway STAR District were \$28,477,231.

Table 19 shows the property taxes levied for the four years before creation of the district and the four years following the year of creation. This increase in taxes for local units of government can be expected to continue for the foreseeable future.

Table 19: General Real Property Taxes Levied, Northwest Speedway STAR District

Time Interval	Real Property Taxes Levied
2012 - 2015	\$10,683,947
2017 - 2020	\$14,803,479

Source: Wyandotte Unified Government

These other sources of tax revenue, for example, personal and corporate income taxes and real property taxes, are also spillover effects from the creation of STAR Bond Districts.



## WUG STAR Bond Projects

### Kansas International Speedway Corporation Project

\$24,300,413 Series 1999, Dated January 22, 1999

Base Sales Tax Allocated to District = NONE (it was brown ground)

Table 20: Sales and Use Tax Collected, Kansas International Speedway Corporation Project, 2016 - 2019

Category	2016	2017	2018	2019
Local	2,106,665.12	322,321.68	383,678.18	374,933.08
State	1,451,797.41	2,190,945.49	933,763.00	951,443.08
Total	3,558,462.53	2,513,267.17	1,317,441.18	1,326,376.16

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

Table 21: Principal Outstanding, Kansas International Speedway Corporation Project, 2016 - 2019

	2016	2017	2018	2019
Balance 12/31	20,570,000	19,300,000	18,055,000	16,835,000

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

There were 44 unique taxpayers within the district during calendar year 2019 and 15 of these filed returns equating at least \$150,000 in taxable sales in 2018.<sup>3</sup>

Visitation Summary: 150,000 + visitors during 2019

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<sup>3</sup> 2019 STAR Bond Report 1.31.2020.pdf, Attachment A p.33

Vacation Village Project Areas 1 and 2A – Schlitterbahn STAR Bonds

\$72,900,000 Series 2015, Dated October 13, 2015

Base Sales Tax Allocated to District = \$464,159.00

Table 22: Sales and Use Tax Collected, Vacation Village Project Areas 1 and 2A – Schlitterbahn STAR Bonds, 2016 - 2019

Category	2016	2017	2018	2019
Local	215,823.03	1,447,954.19	1,281,468.45	1,648,141.68
State	721,268.89	4,723,731.59	3,547,424.31	4,866,198.32
Total	937,091.92	6,171,685.78	4,828,892.76	6,514,340.00

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

Table 23: Principal Outstanding, Vacation Village Project Areas 1 and 2A – Schlitterbahn STAR Bonds, 2016 - 2019

	2016	2017	2018	2019
Balance 12/31	72,840,000	71,530,000	66,890,000	65,755,000

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

There were 206 unique taxpayers within the district during calendar year 2019 and 55 of these filed returns equating at least \$150,000 in taxable sales in 2018.<sup>4</sup>

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<sup>4</sup> 2019 STAR Bond Report 1.31.2020.pdf, Attachment A p.33

Vacation Village Project Areas 1 and 2A – Schlitterbahn STAR Bonds  
\$12,260,000 Subordinate Lien Series 2015B, Dated October 13, 2015  
Base Sales Tax Allocated to District = NONE

Table 24: Principal Outstanding, Vacation Village Project Areas 1 and 2A – Schlitterbahn STAR Bonds, 2016 - 2019

	2016	2017	2018	2019
Balance 12/31	12,260,000	12,260,000	11,795,000	11,315,000

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

Visitation Summary: The Schlitterbahn Water Park closed in 2019.

Vacation Village Project Area 4 – US Soccer STAR Bonds

\$65,229,559.85 Series 2015, Dated August 26, 2015

Base Sales Tax Allocated to District = \$50,548,378.61

Table 25: Sales and Use Tax Collected, Vacation Village Project Area 4 – US Soccer STAR Bonds, 2017 - 2019

Category	2017	2018	2019
Local	690,383.83	571,542.11	548,763.61
State		408,126.03	744,180.06
Total	690,383.83	979,668.14	1,292,943.67

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

Table 26: Principal Outstanding, Vacation Village Project Area 4 – US Soccer STAR Bonds, 2016 - 2019

	2016	2017	2018	2019
Balance 12/31	69,772,419	74,559,593	78,705,519	83,138,374

Source: Kansas Department of Commerce, STAR Bond Report, 1/31/2020

There were 603 unique taxpayers within the district during calendar year 2019 and 260 of these filed returns equating at least \$150,000 in taxable sales in 2018.<sup>5</sup>

Visitation Summary: 1.3 million + visitors during 2019

City of Kansas City: Children's Mercy Park

\$150,289,488.50 Series 2010, Dated May, 2010

Bonds are paid off.

Project continues to generate Sales Tax Revenue

Visitation Summary: 450,000 + visitors during 2019

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<sup>5</sup> 2019 STAR Bond Report 1.31.2020.pdf, Attachment A p.33

## Wyandotte Unified Government STAR Bond Area Maps

Maps 4 and 5 show the area around the Racetrack STAR Bond project before the project began. Map 4 provides a wider view and Map 5 is a closer view. In both views, it is clear that there is little development in this portion of Wyandotte County, although there are two intersecting interstate highways.

Map 4: The Area Before STAR Bond districts, 3/25/1997



Source: U.S. Geological Survey, retrieved from Google Earth

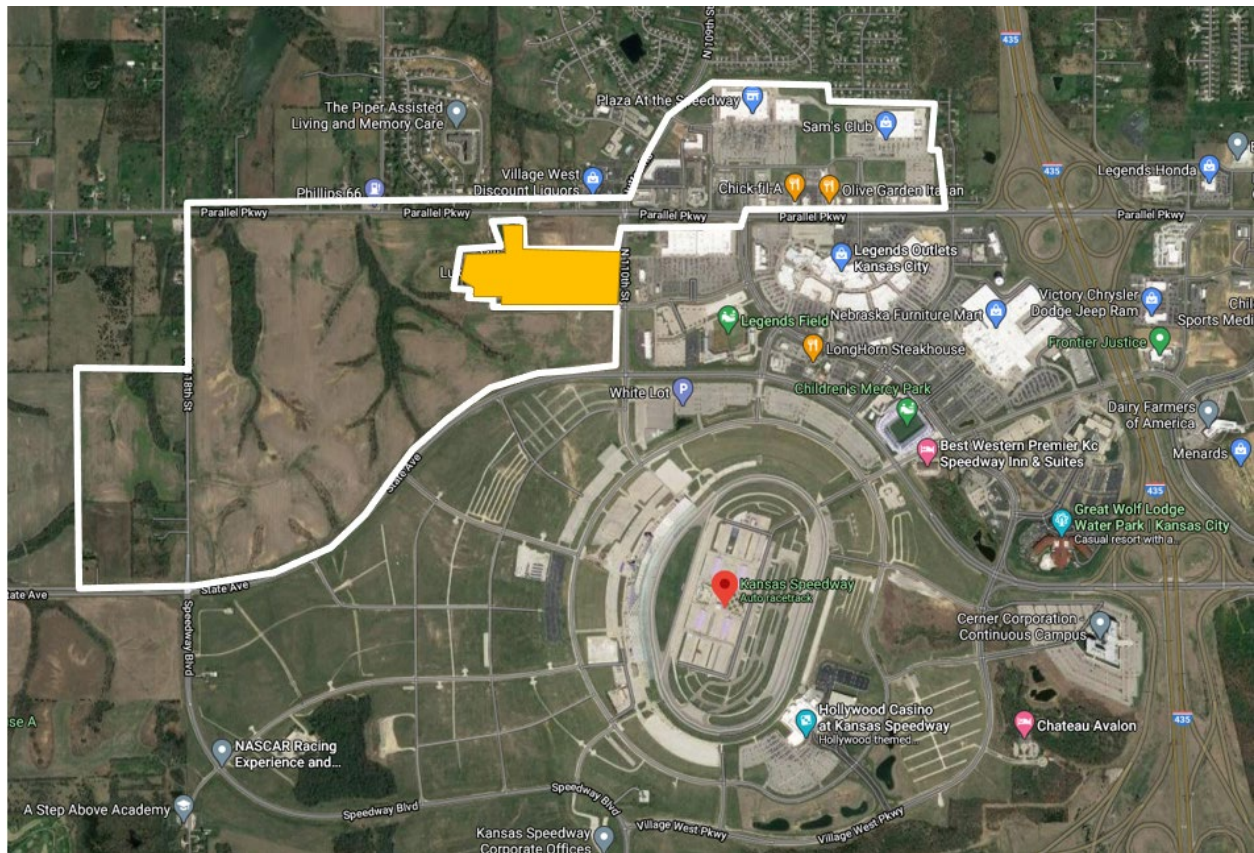
This aerial map shows the area around the Kansas Speedway. A yellow outline highlights a specific parcel located north of the speedway, near Stadium Dr and Phoenix Dr. The map includes labels for various roads such as Stadium Dr, Phoenix Dr, Speedway Blvd, and several north-south streets. The Kansas Speedway is marked with a red pin. The map also features a scale bar and a north arrow.

Source: U.S. Geological Survey, retrieved from Google Earth

The orange shaded area in Maps 5 and 6 are not included in the STAR Bond boundary.



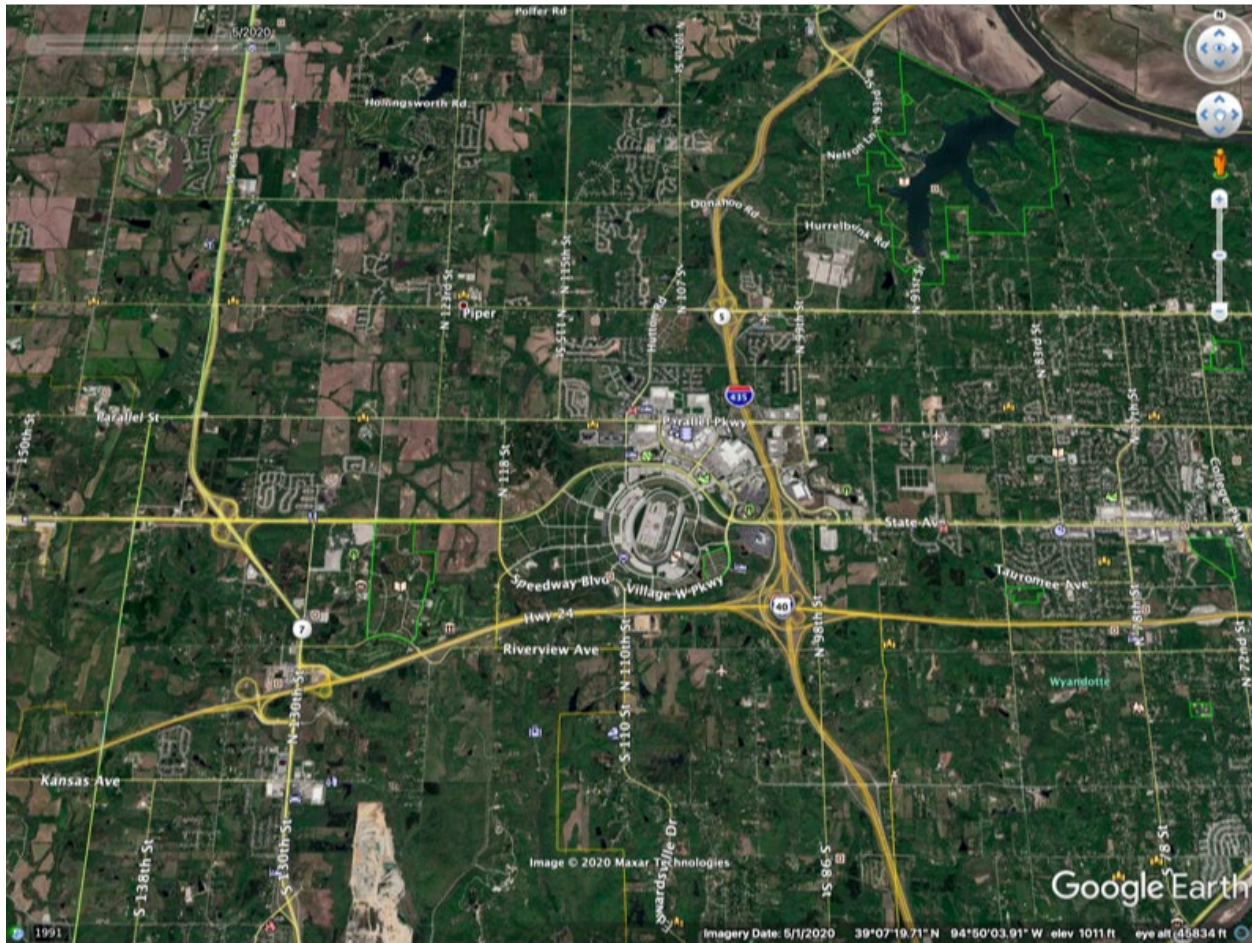
Map 6: The Present Area STAR Bond Districts, 2021



Source: Maxar Technologies, USDA Farm Service Agency, retrieved from Google Maps.

The orange shaded area in Maps 5 and 6 are not included in the STAR Bond boundary.

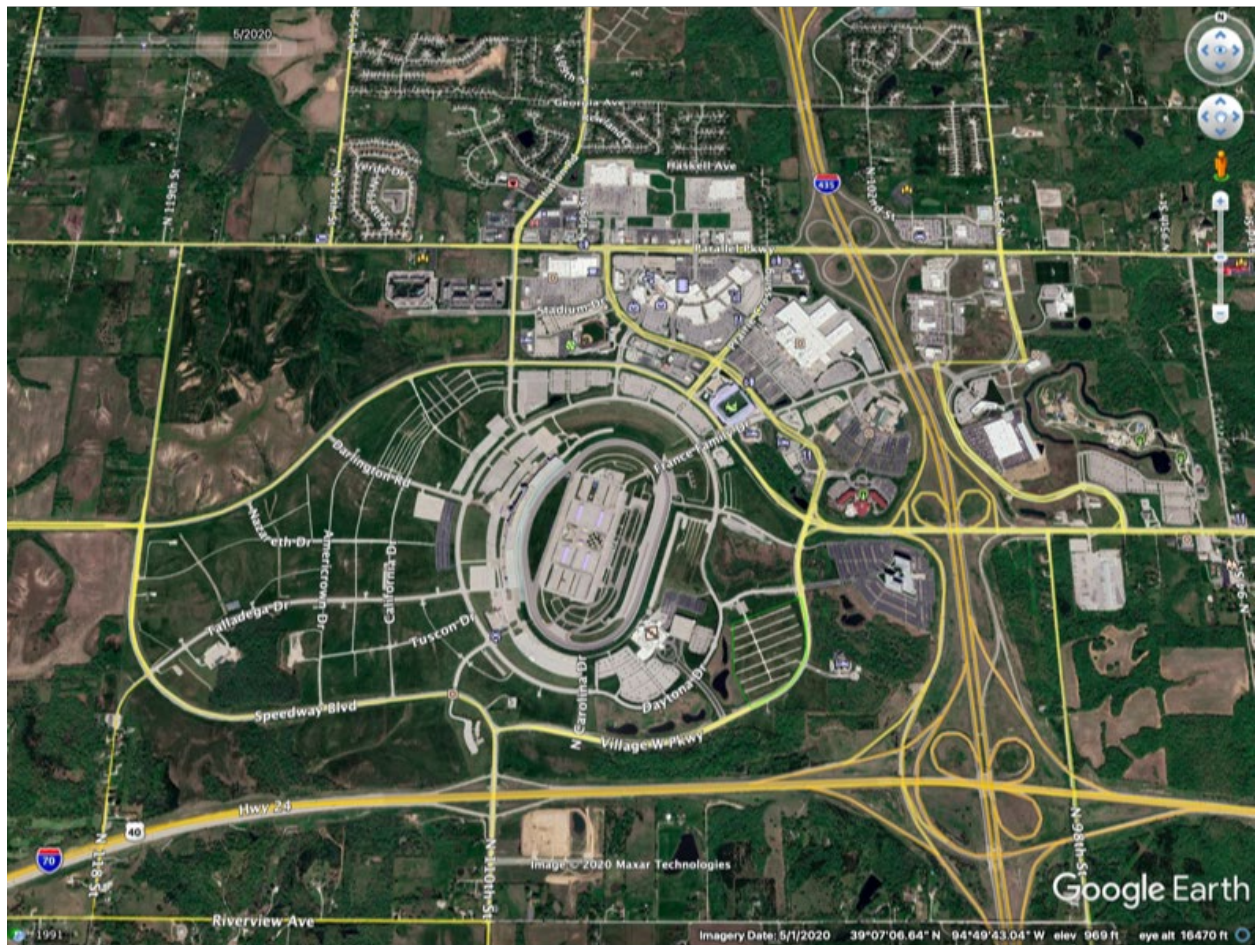
Map 7: STAR Bond District Area, 5/1/2020



Source: Maxar Technologies, retrieved from Google Earth



Map 8: STAR Bond District Area, 5/1/2020



Source: Maxar Technologies, retrieved from Google Earth

## Wyandotte Unified Government Findings

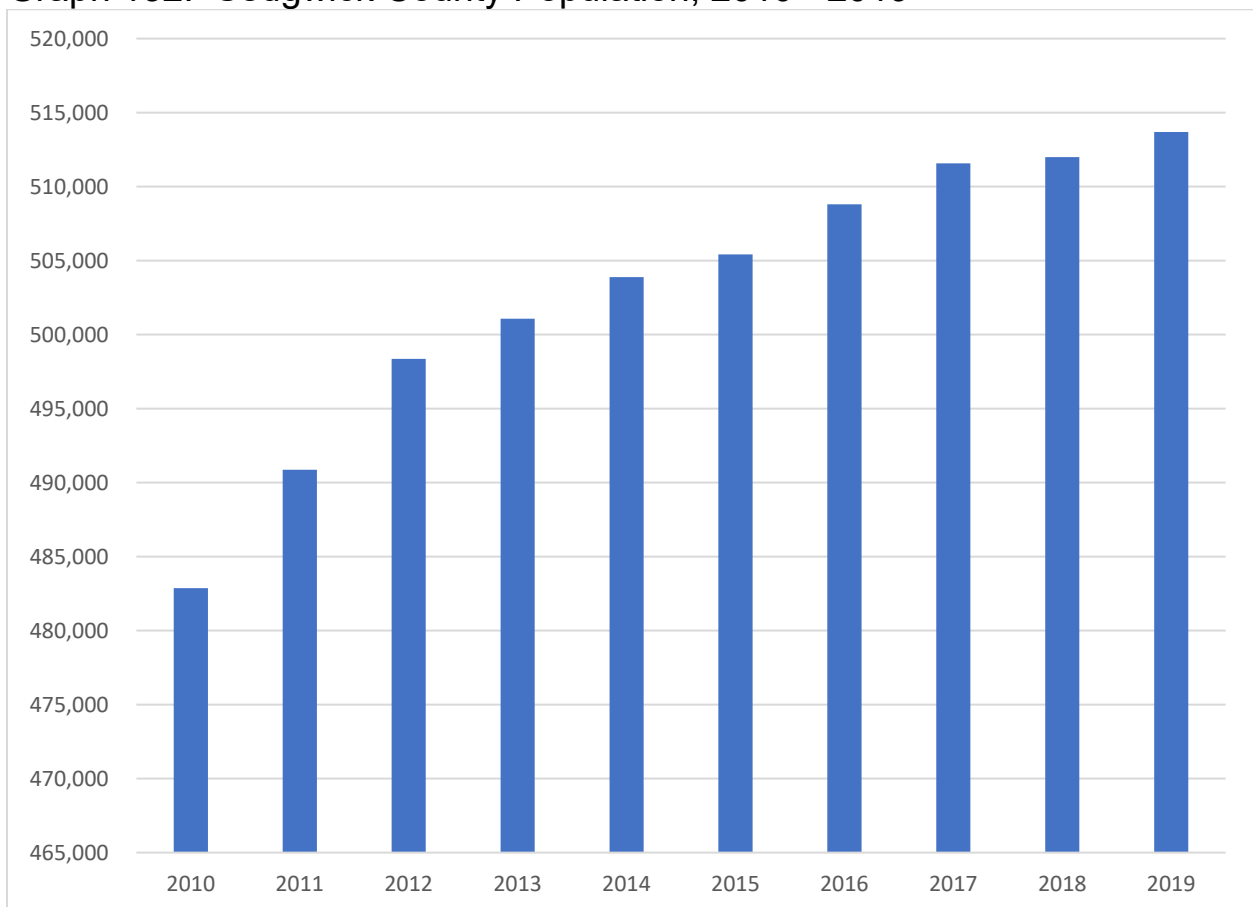
- The STAR Bonds projects in this area go back to 2001 with the Kansas Speedway being the first, with additional issuings up through the U.S. Soccer Training Facility in 2015. Issuings between those include two issues in Village West, Sporting Park (Now Mercy Children's Park) and Schlitterbahn Waterpark.
- The recent growth of population in Wyandotte County is outside of its major city.
- Historical aerial maps of the NW Wyandotte County area show little evidence of commercial activity and most of the land seemed to be used for agricultural purposes before the STAR Bond projects.
- Although this agricultural “brown ground” land has economic value, it seldom generates sales taxes. Sales taxes are generated from ongoing retail transactions. Thus, new commercial development is likely to generate new sales taxes.
- The time series of maps show the progression of development in and around the STAR Bond project. Again, the point is that development is a long-term process. Secondly, assisting in the development of “brown ground” into developed land where business activity that generates sales taxes can occur is an important activity.
- The labor data shows that for ZIP code 66112, which is to the east of the STAR Bond projects and is closer to the urban center of the Kansas City MSA, there are often more employees for an economic sector.
- The labor data shows that for ZIP codes 66111 & 66109, the two ZIP codes with very high levels of STAR Bond activity, the increase in the number of employees often occurs after the start of a STAR Bond financed activity and is accompanied by an increase in average wage.

- The Visitor RSC for hotel and motel services in Wyandotte County is consistently above 96 percent, suggesting very high levels of out-of-state stays.
- We found that there were no accommodation employees in ZIP 66111 until 2004 and that 2005 saw a major increase in employees, which has continued through 2018. A similar pattern occurred slightly later in ZIP 66109, but did not occur in ZIP 66112.
- Residential building permit data show an Increase in residential building permits.
- For the past ten years, the business activity as measured by Kansas Sales Tax collected has remained quite stable for the four counties with STAR Bond projects under review. One obvious conclusion is that change is slow and it is very hard to deviate from “normal.”
- These other sources of tax revenue, for example, personal and corporate income taxes and real property taxes, are also spillover effects from the creation of STAR Bond Districts.

## Wichita

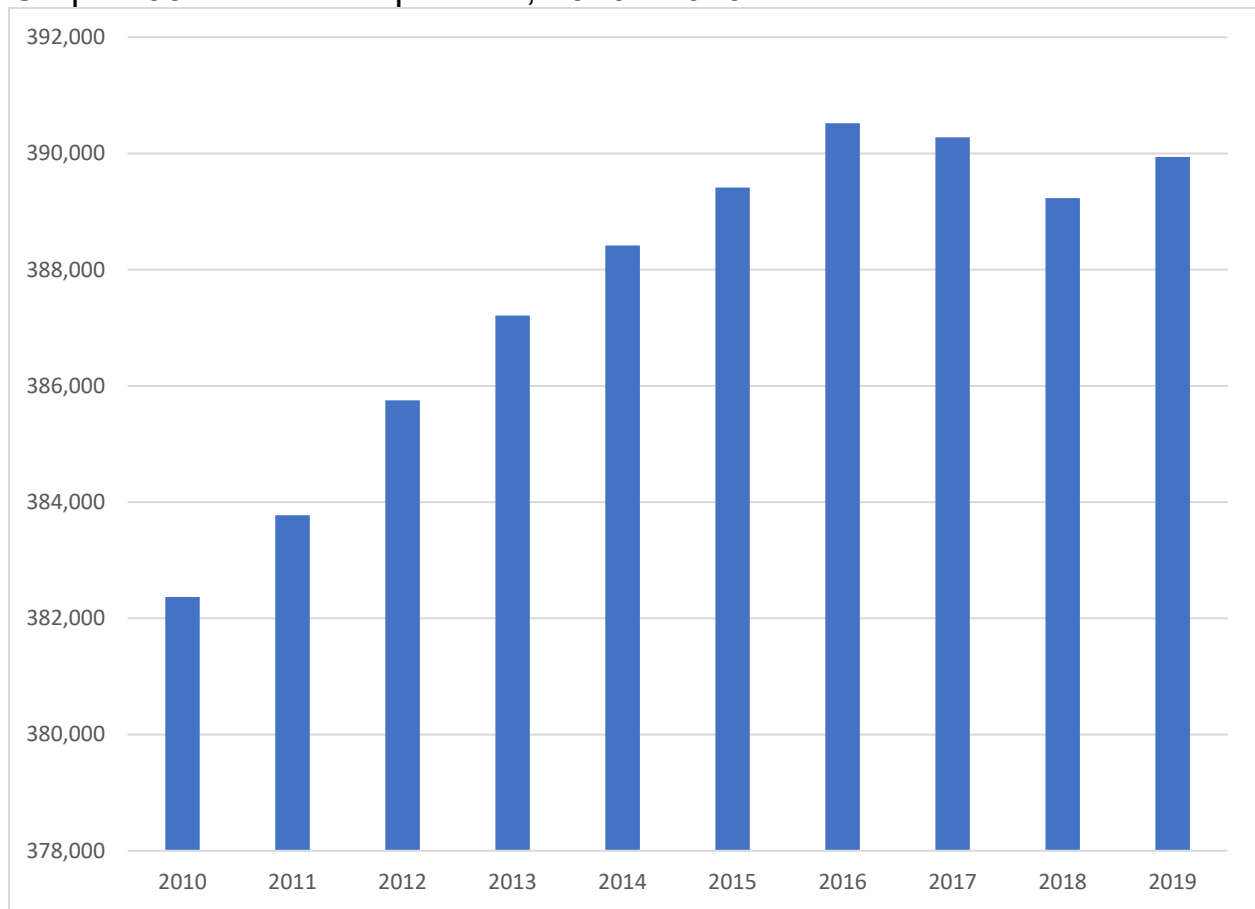
STAR Bond issuings in Wichita are Riverwalk Phase 1 (2007), Riverwalk Phase 2 (2014), K-96/Greenwich (2013), and Lawrence Dumont Stadium area (2016). Our approach is to look at the larger context and then focus on the specific STAR Bond projects. Because people are the major economic agents, either as producers of goods and services or as consumers of them we consider population first. Graphs 132 and 133 show the estimated population for Sedgwick County and Wichita for the last decade. Both areas show growth in the estimated population with Sedgwick County reaching its peak in 2019, while Wichita reached its peak in 2016.

Graph 132: Sedgwick County Population, 2010 - 2019



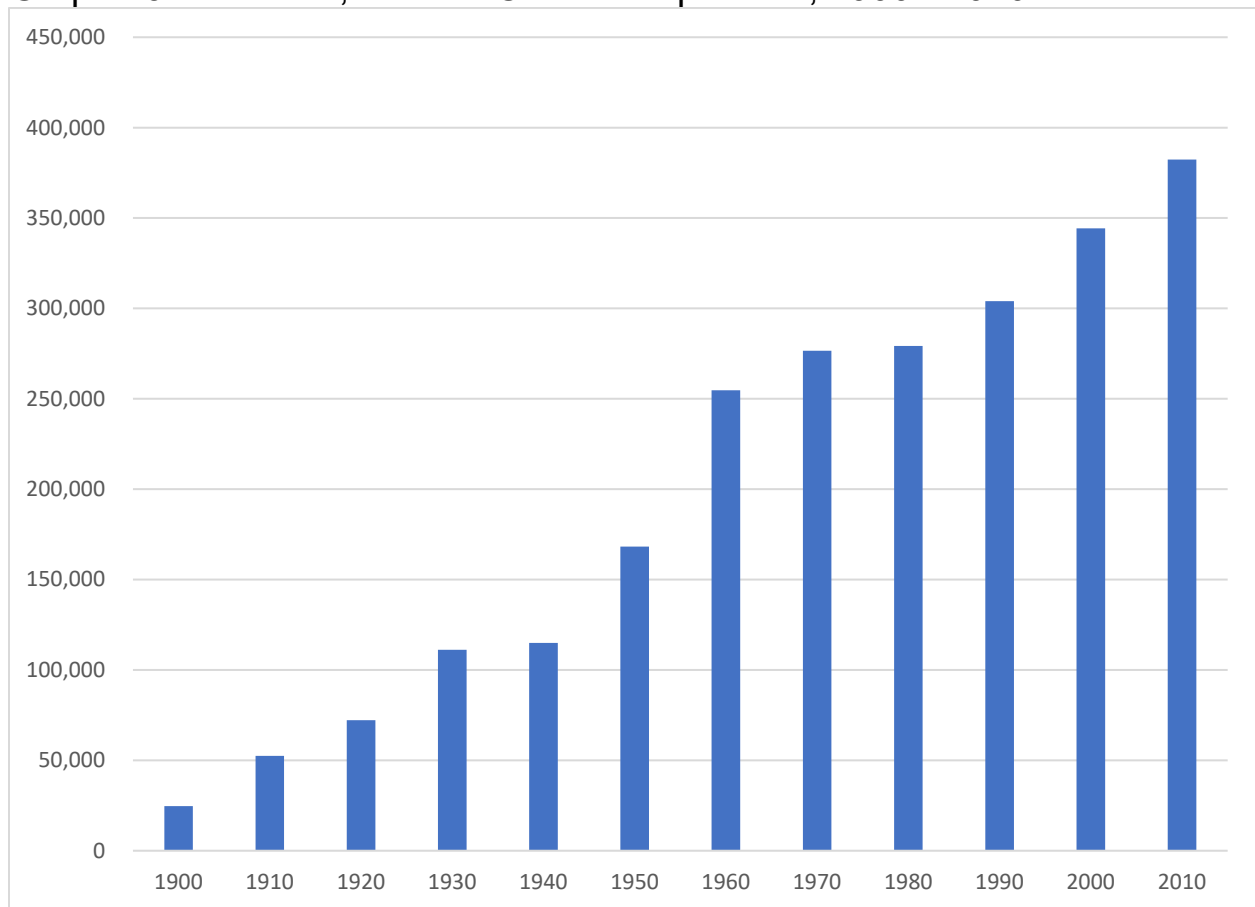
Source: U.S. Census Bureau

**Graph 133: Wichita Population, 2010 - 2019**



Source: U.S. Census Bureau

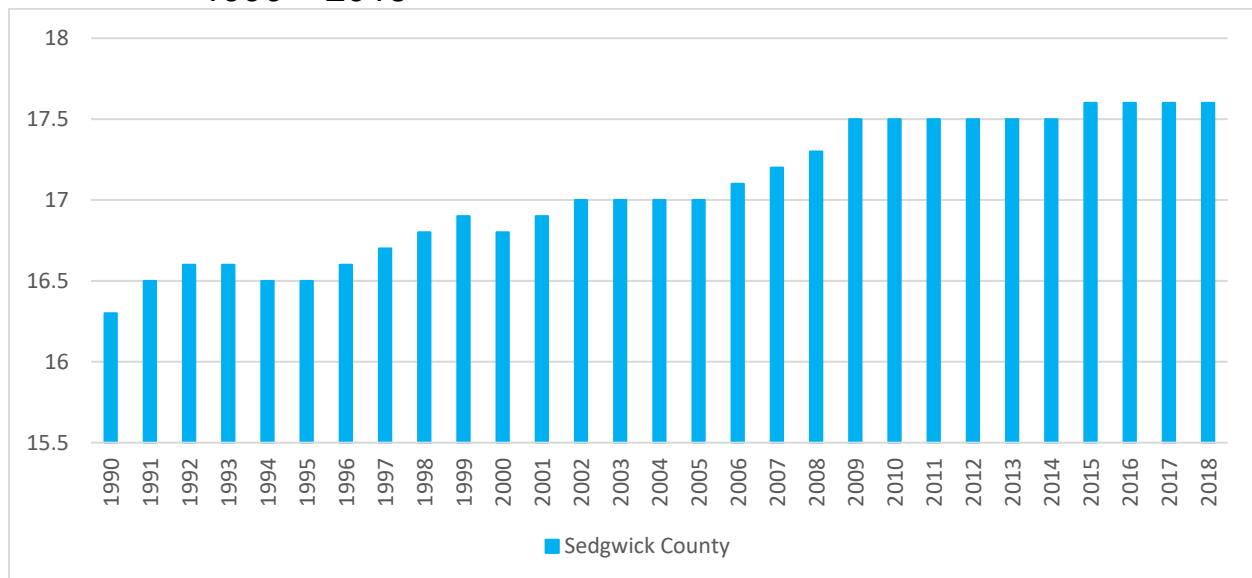
Graph 134: Wichita, Kansas Census Population, 1900 - 2010



Source: U.S. Census Bureau, Decennial Census, 1990 – 2010

Graph 134 shows that the Wichita population has consistently grown since 1900. People have been attracted to the city because of economic opportunities throughout the last century.

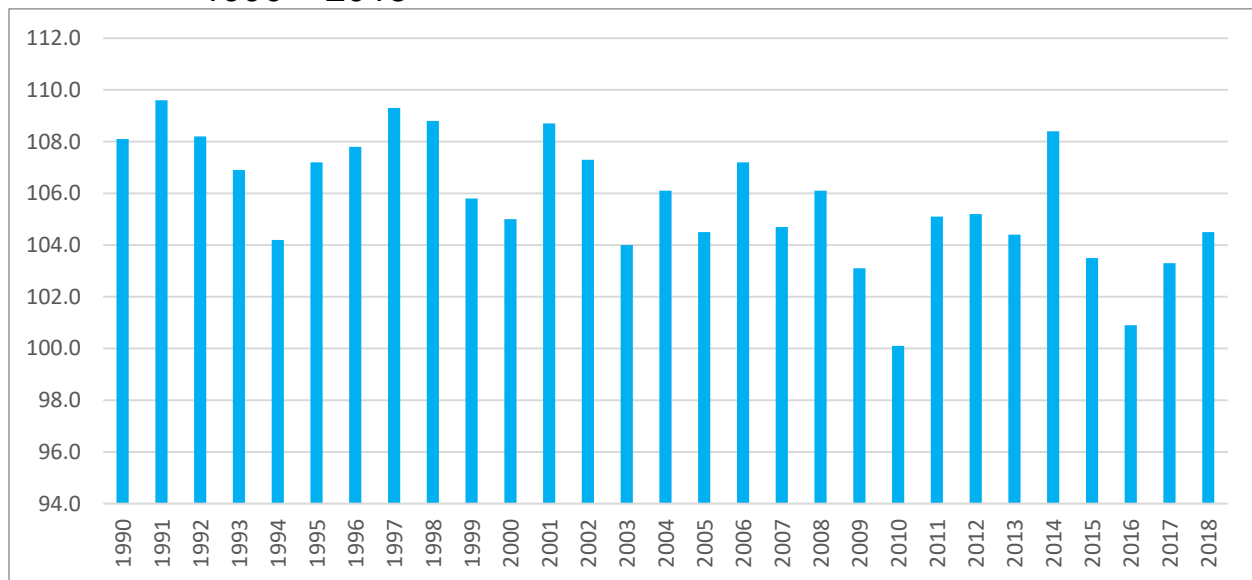
Graph 135: Sedgwick County Population as Percent of Kansas Population, 1990 – 2018



Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

Graph 135 provides a historical view of Sedgwick County's estimated population since 1990 as a percentage of the Kansas population. Sedgwick County's has increased from less than 16.5 percent to more than 17.5 percent of the Kansas population over this time frame.

Graph 136: Per Capita Income, Sedgwick County as Percent of Kansas, 1990 – 2018



Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

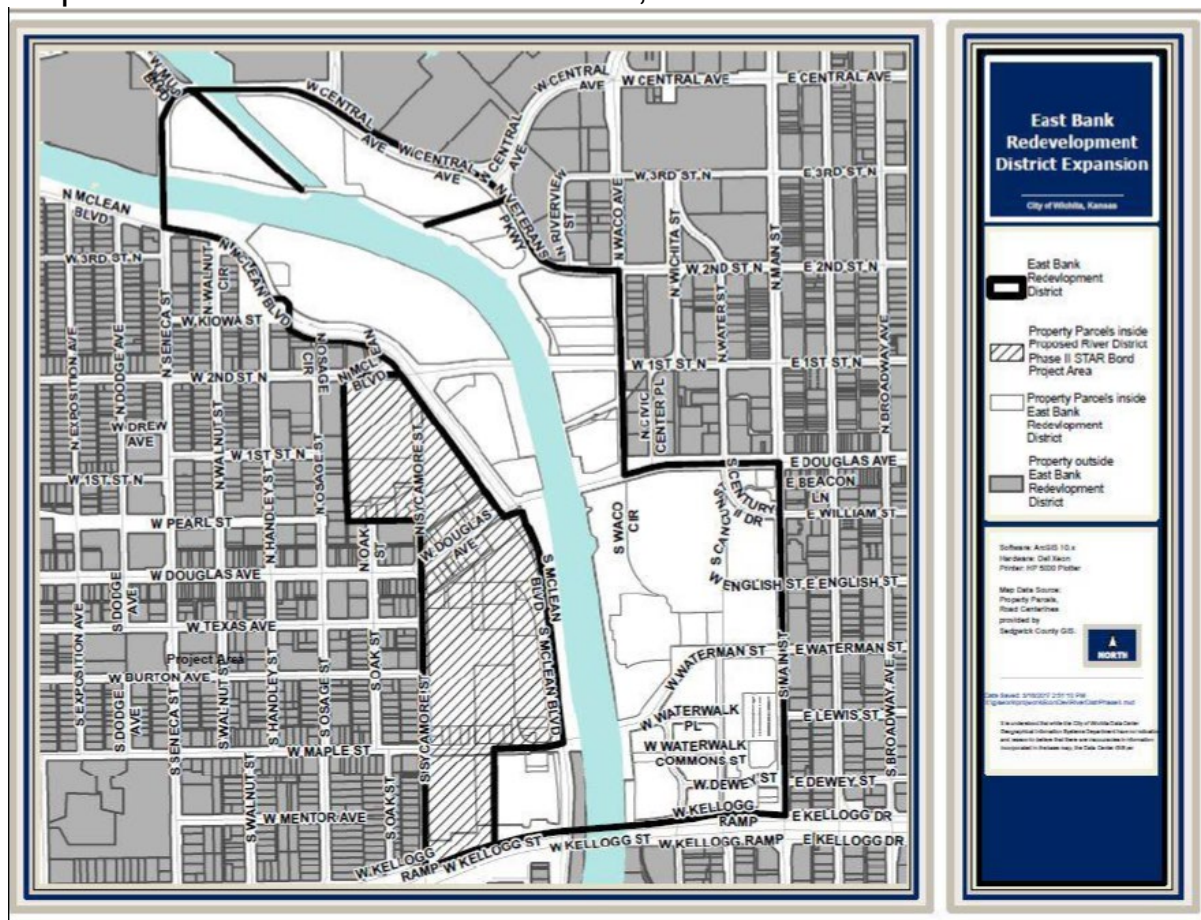
Graph 136 shows that the per capita income in Sedgwick County is generally higher than the per capita income in Kansas.



## Wichita STAR Bond Districts

Maps 9 through 11 show the boundaries of the three STAR Bond projects that have been undertaken by the City of Wichita. The two Riverwalk projects are in the urban core of Wichita, while the K96 and Greenwich project is a “brown ground” project. It is located in the northeastern portion of Wichita.

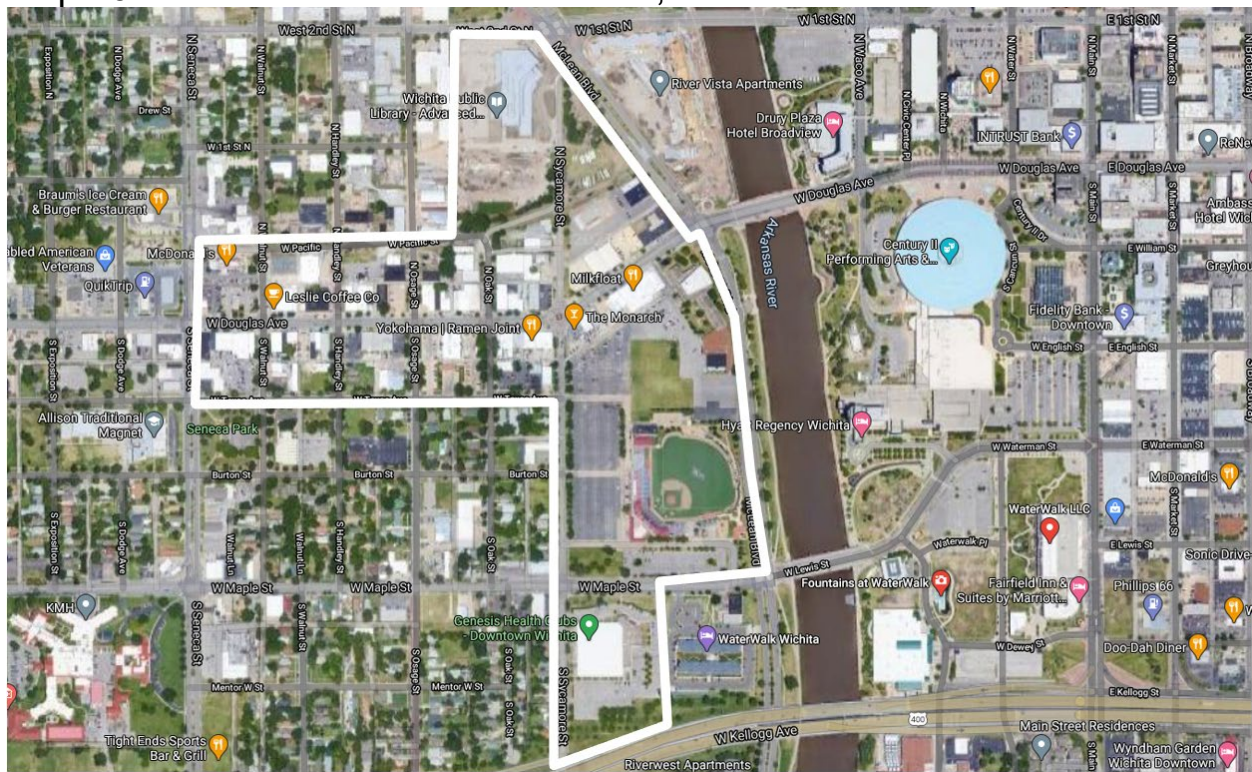
Map 9: Riverwalk STAR Bond District, East Bank



Schedule 1

Source: [https://www.sedgwickcounty.org/GisImages/printablemaps/cousc\\_ZIP\\_c.pdf](https://www.sedgwickcounty.org/GisImages/printablemaps/cousc_ZIP_c.pdf)

Map 10: Riverwalk STAR Bond District, West Bank



Source: Maxar Technologies, U.S. Geological Survey, USDA Farm Service Agency. Retrieved from Google Maps.

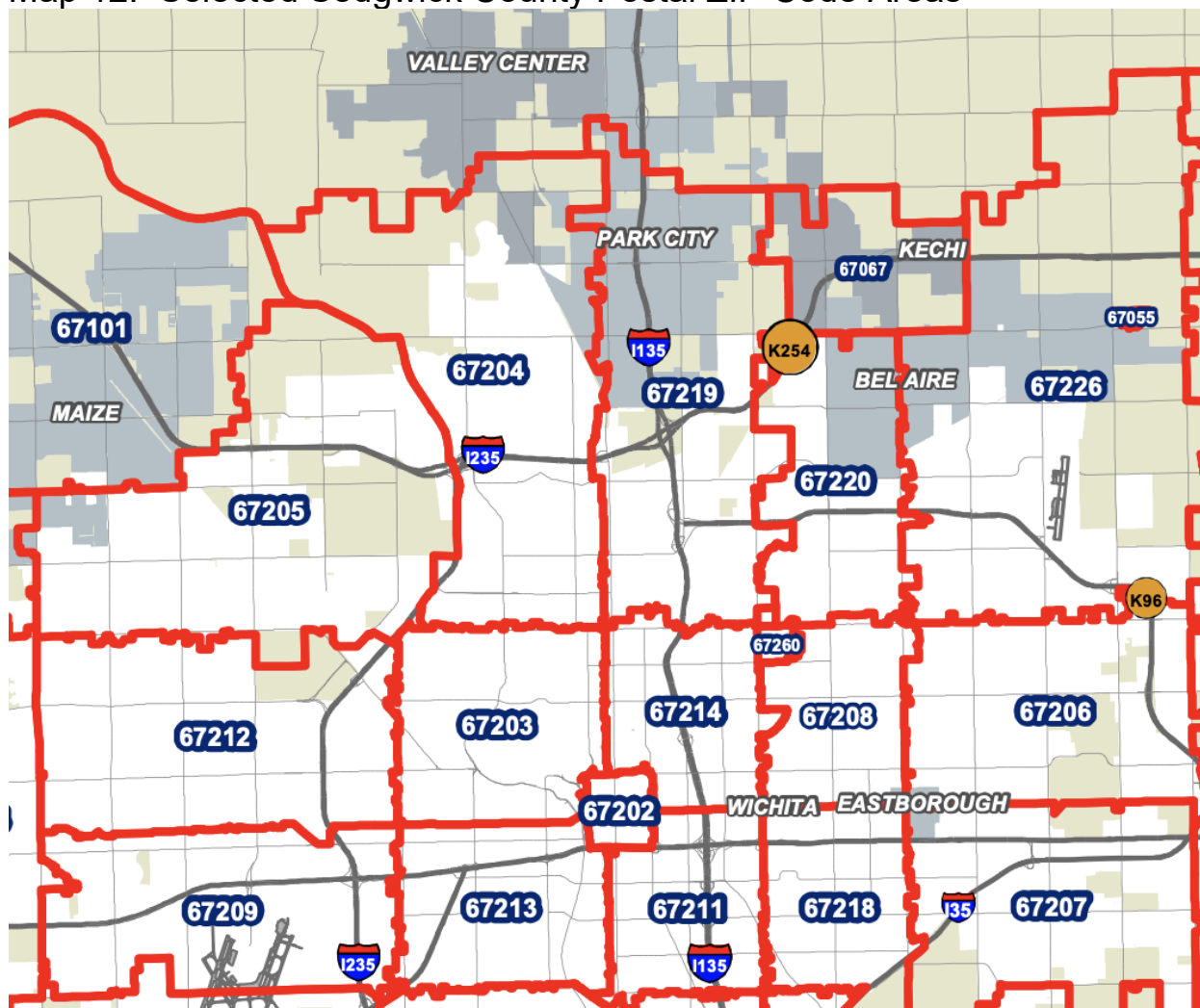


Map 11: K96 and Greenwich STAR Bond District



Source: Maxar Technologies, U.S. Geological Survey, USDA Farm Service Agency. Retrieved from Google Maps.

Map 12: Selected Sedgwick County Postal ZIP Code Areas



Source: [https://www.sedgwickcounty.org/GisImages/printablemaps/cousc\\_ZIP\\_c.pdf](https://www.sedgwickcounty.org/GisImages/printablemaps/cousc_ZIP_c.pdf)

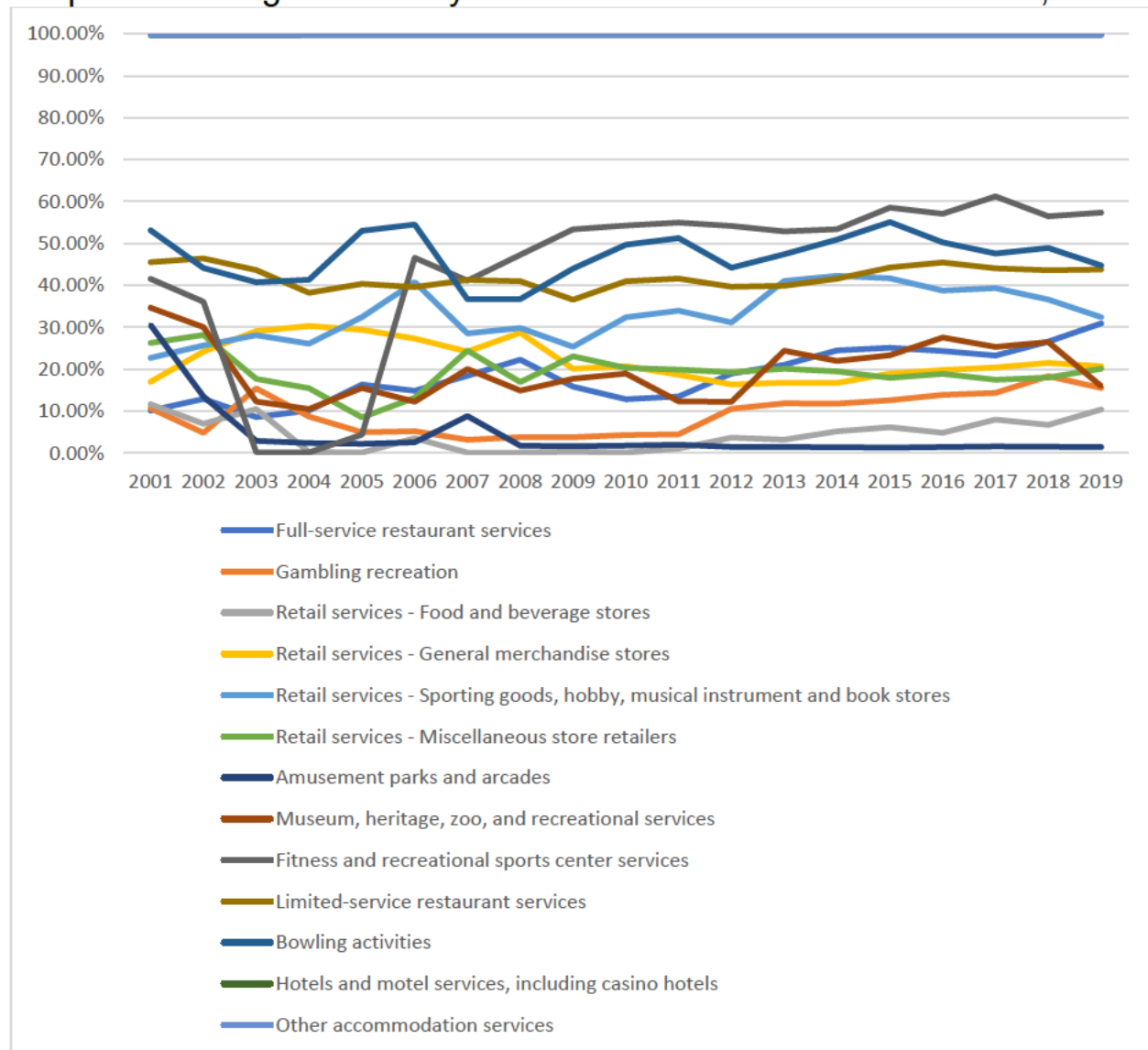
Map 12 shows the relevant ZIP codes (67202, 67203, and 67226) for the STAR Bond projects in Wichita. Postal ZIP codes are used by the Kansas Department of Labor and we were able to extract data from them down to the ZIP code level for this report.

### Sedgwick County Visitor Regional Supply Coefficients

Tables 27 through 29 show the Visitor Regional Supply Coefficients (Visitor RSCs) for 2001. This county level data is derived from the Implan economic

modelling software and data. It is helpful to remember that Wichita is the largest city in south central Kansas and a regional trading center. Thus, it takes a very large change to affect its economy. Visitor RSC values through time are shown in Graphs 137 through 139. Finally, Table 30 provides the Visitor RSC values for both 2001 and 2019.

Graph 137: Sedgwick County Visitor RSC Greater Than 10 Percent, 2001



Source: Data from Implan, calculations by the author.

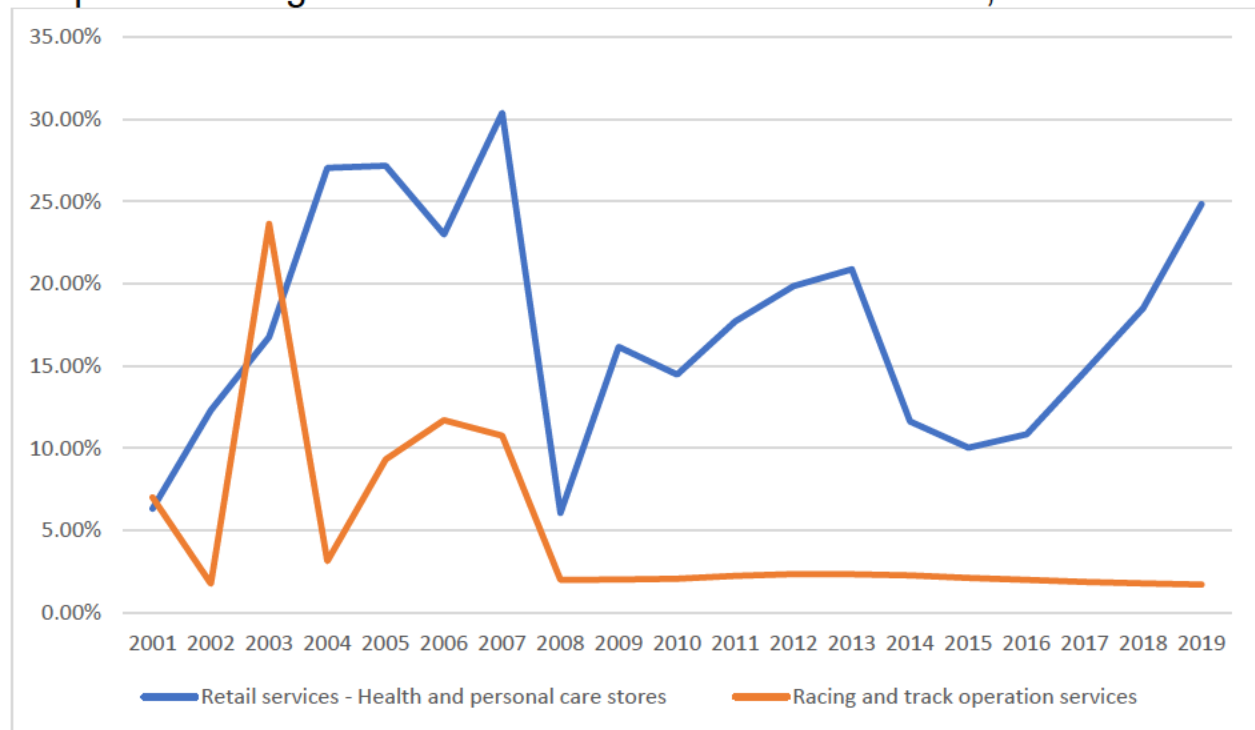
The major observation from Graph 137 is that hotels, motels, and other accommodations continue to have a visitor RSC that is close to 100 percent. Please note, the values for “hotels, motels, including casino hotels” shown in graph 137 are almost identical to “other accommodation services.” They overlap each other. The percentages for all categories are found in table 27. It is also apparent that visitors from outside Sedgwick County who come for other goods or services, for example medical, shopping, or entertainment, are also dining. That is, they are “making a day of it.”

**Table 27: Sedgwick County Visitor RSCs, 2001**

Description	Visitor RSC
Full-service restaurant services	10.15%
Gambling recreation	10.65%
Retail services - Food and beverage stores	11.62%
Retail services - General merchandise stores	16.98%
Retail services - Sporting goods, hobby, musical instrument and book stores	22.70%
Retail services - Miscellaneous store retailers	26.26%
Amusement parks and arcades	30.53%
Museum, heritage, zoo, and recreational services	34.65%
Fitness and recreational sports center services	41.54%
Limited-service restaurant services	45.52%
Bowling activities	53.13%
Hotels and motel services, including casino hotels	99.70%
Other accommodation services	99.73%

Source: Data from Implan, calculations by the author.

Graph 138: Sedgwick Visitor RSC 10 Percent to 5 Percent, 2001



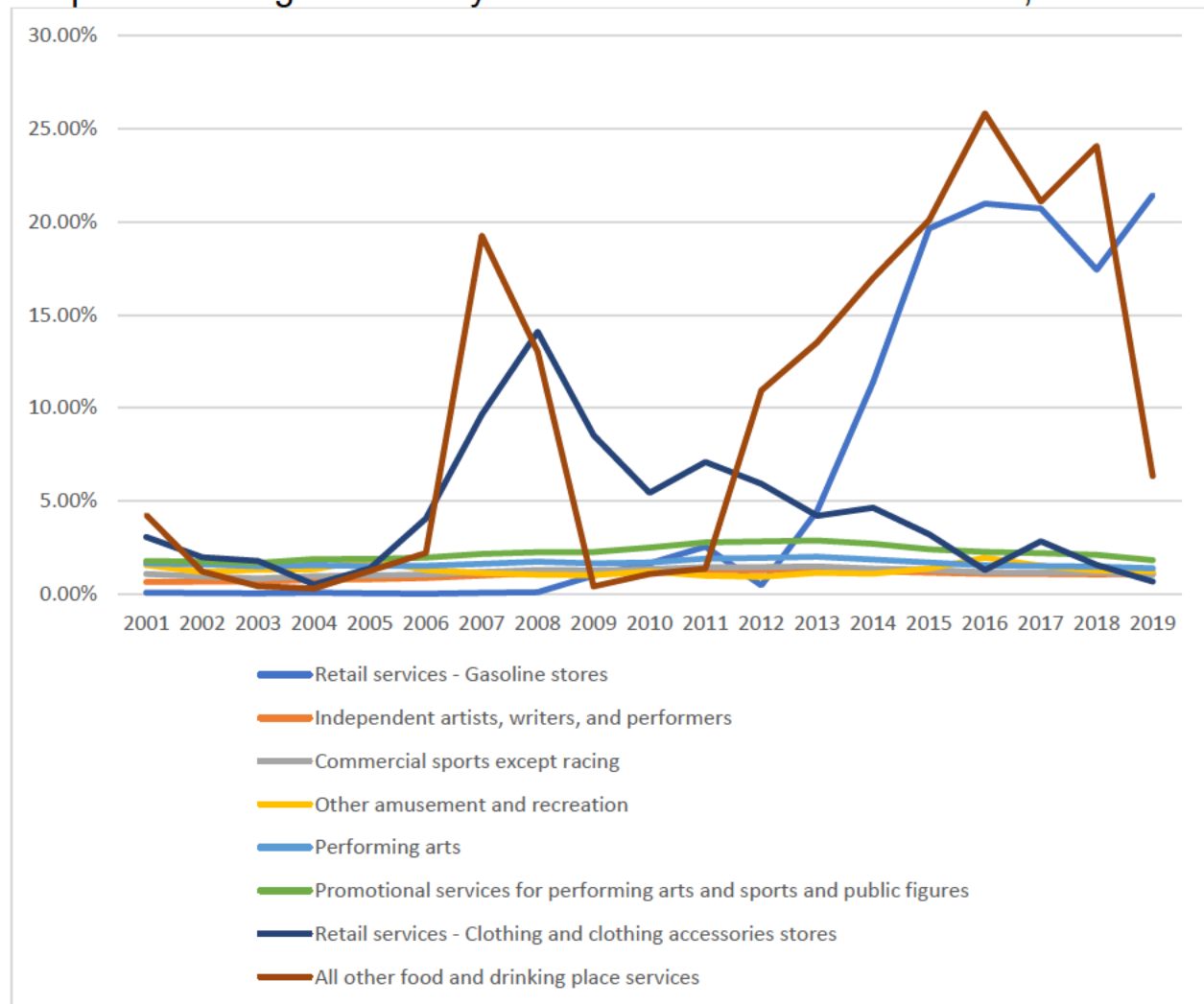
Source: Data from Implan, calculations by the author.

Table 28: Sedgwick County Visitor RSCs, 2001

Description	Visitor RSC
Retail services - Health and personal care stores	6.32%
Racing and track operation services	7.00%

Source: Data from Implan, calculations by the author.

Graph 139: Sedgwick County Visitor RSC Less Than 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Graph 139 shows that with the exception of gasoline stores and all other food and drinking places the smallest Visitor RSCs are very stable through time.



Table 29: Sedgwick County Visitor RSCs, 2001

Description	Visitor RSC
Retail services - Gasoline stores	0.07%
Independent artists, writers, and performers	0.64%
Commercial sports except racing	1.07%
Other amusement and recreation	1.55%
Performing arts	1.64%
Promotional services for performing arts and sports and public figures	1.77%
Retail services - Clothing and clothing accessories stores	3.06%
All other food and drinking place services	4.24%

Source: Data from Implan, calculations by the author.

Table 30: Sedgwick County Visitor RSCs, 2001 and 2019

Description	2001	2019
Retail services - Gasoline stores	0.07%	21.43%
Independent artists, writers, and performers	0.64%	1.07%
Commercial sports except racing	1.07%	1.05%
Other amusement and recreation	1.55%	1.22%
Performing arts	1.64%	1.38%
Promotional services for performing arts and sports and public figures	1.77%	1.81%
Retail services - Clothing and clothing accessories stores	3.06%	0.67%
All other food and drinking place services	4.24%	6.34%
Retail services - Health and personal care stores	6.32%	24.84%
Racing and track operation services	7.00%	1.70%
Full-service restaurant services	10.15%	30.91%
Gambling recreation	10.65%	15.52%
Retail services - Food and beverage stores	11.62%	10.37%
Retail services - General merchandise stores	16.98%	20.71%
Retail services - Sporting goods, hobby, musical instrument and book stores	22.70%	32.41%
Retail services - Miscellaneous store retailers	26.26%	20.10%
Amusement parks and arcades	30.53%	1.44%
Museum, heritage, zoo, and recreational services	34.65%	15.98%
Fitness and recreational sports center services	41.54%	57.37%
Limited-service restaurant services	45.52%	43.77%
Bowling activities	53.13%	44.76%
Hotels and motel services, including casino hotels	99.70%	99.74%
Other accommodation services	99.73%	99.76%

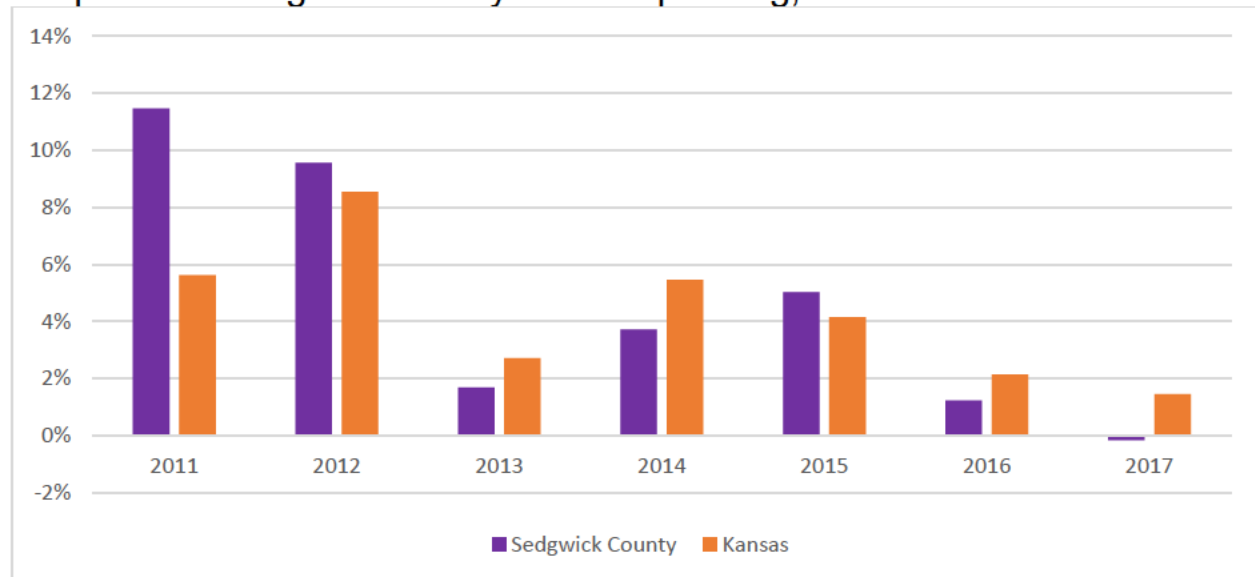
Source: Data from Implan, calculations by the author.

## Sedgwick County Tourism

The graphs in this section are based on data from annual publications of the Kansas Department of Wildlife, Parks, and Tourism and compare Sedgwick

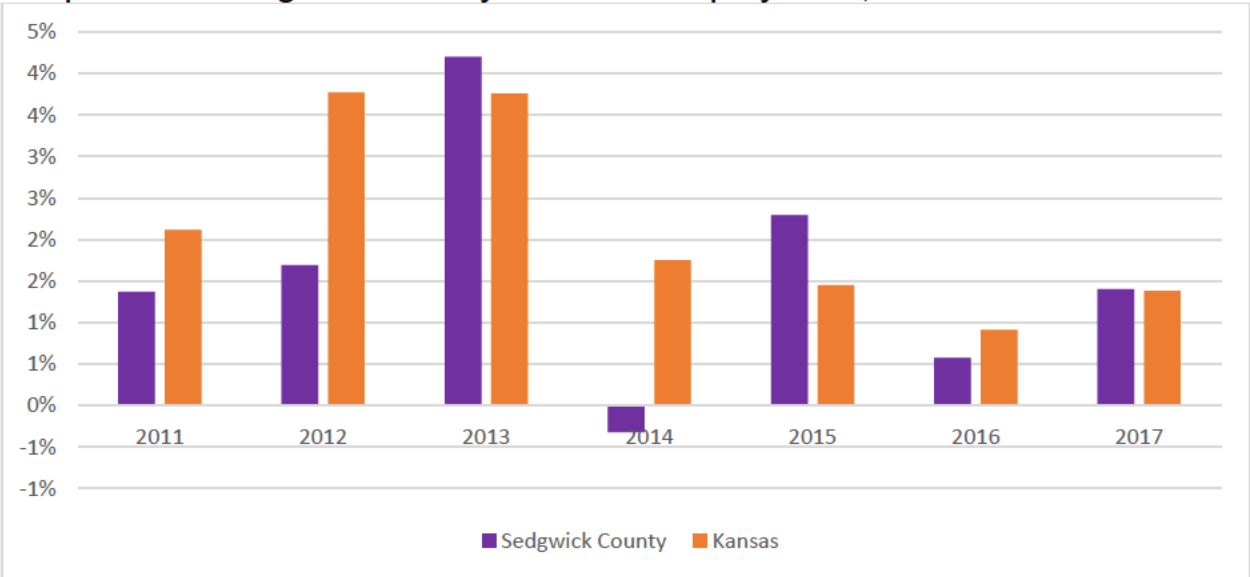
County's data with the State of Kansas. The annual growth rate allows direct comparison when there are large differences in the scale of the underlying data values. There is more volatility at the county level because the state level data encompasses all of the counties.

Graph 140: Sedgwick County Visitor Spending, Annual Growth Rate



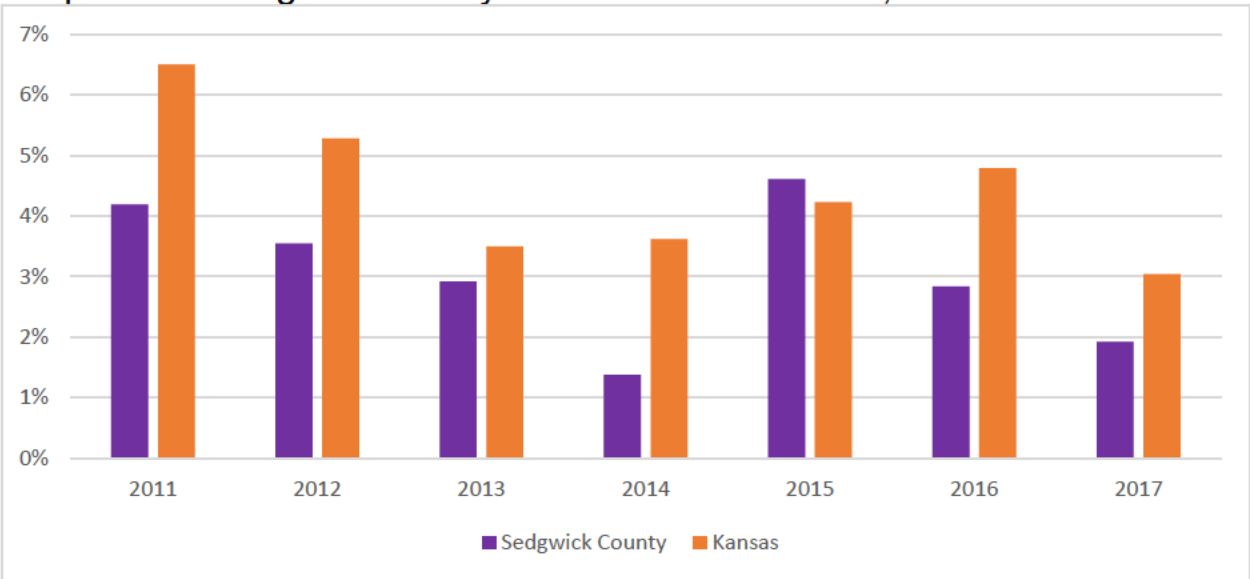
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 141: Sedgwick County Tourism Employment, Annual Growth Rate



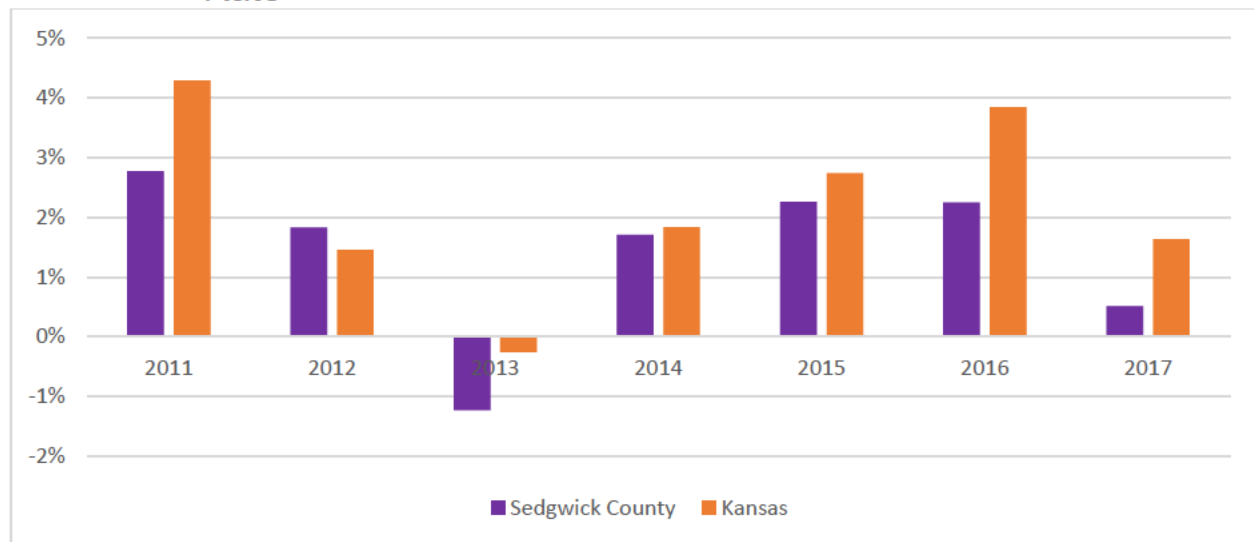
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 142: Sedgwick County Tourism Labor Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

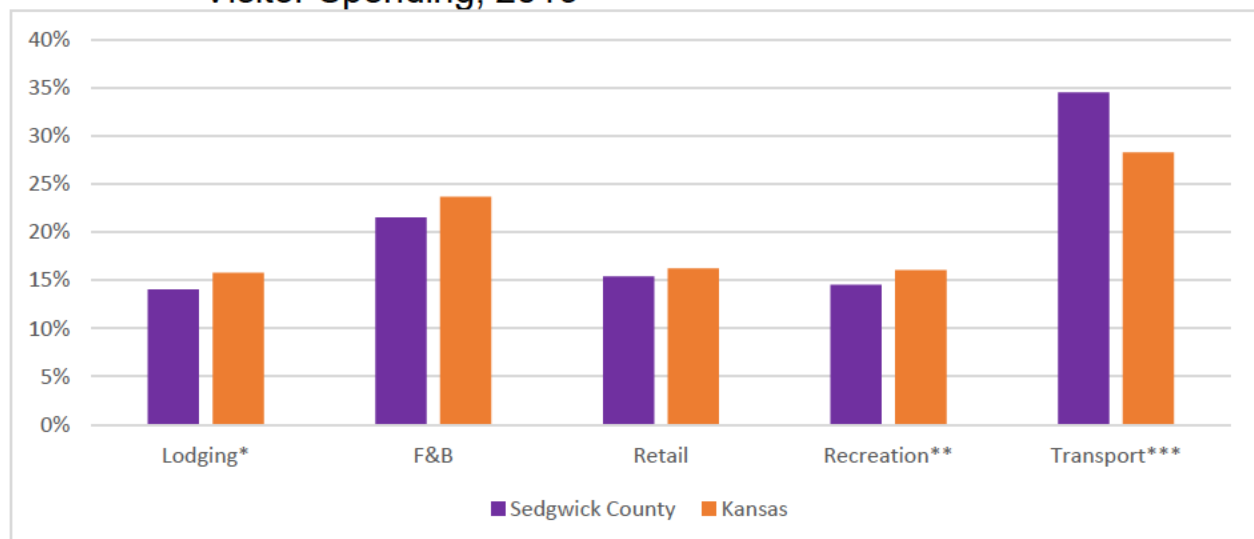
Graph 143: Sedgwick County Tourism Average Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

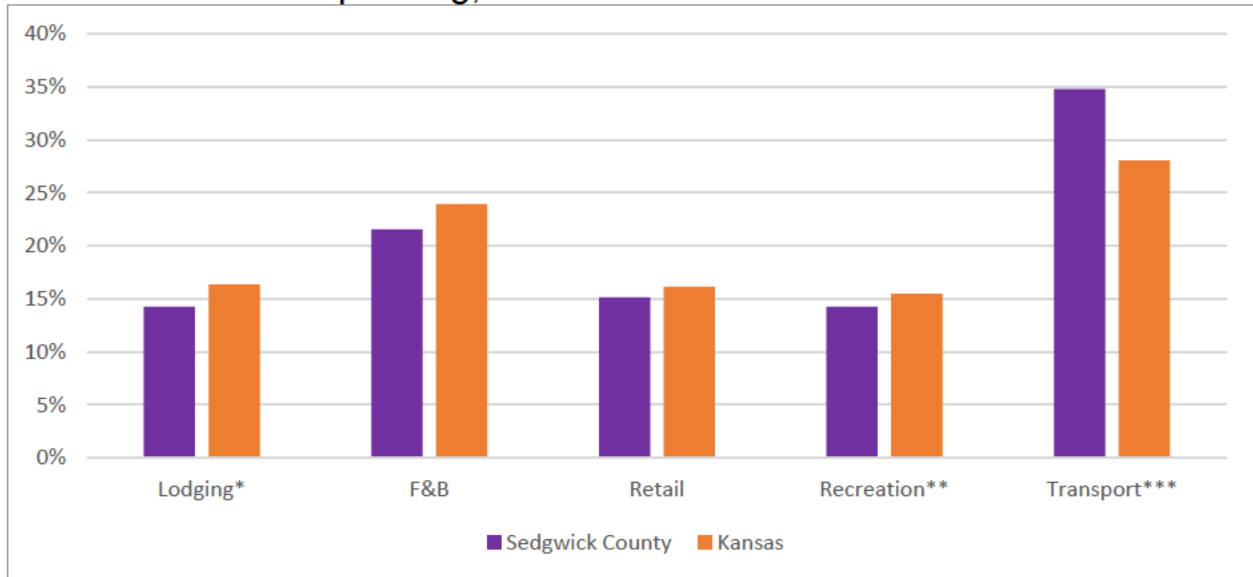
Graphs 144 through 146 reveal the importance of the National Airport (ICT) in Wichita as a transportation hub for visitors coming to Kansas. Sedgwick County lags behind Kansas in all the other visitor spending categories for the three years of data presented by these graphs.

Graph 144: Sedgwick County Visitor Spending Category, Percent of Total Visitor Spending, 2013



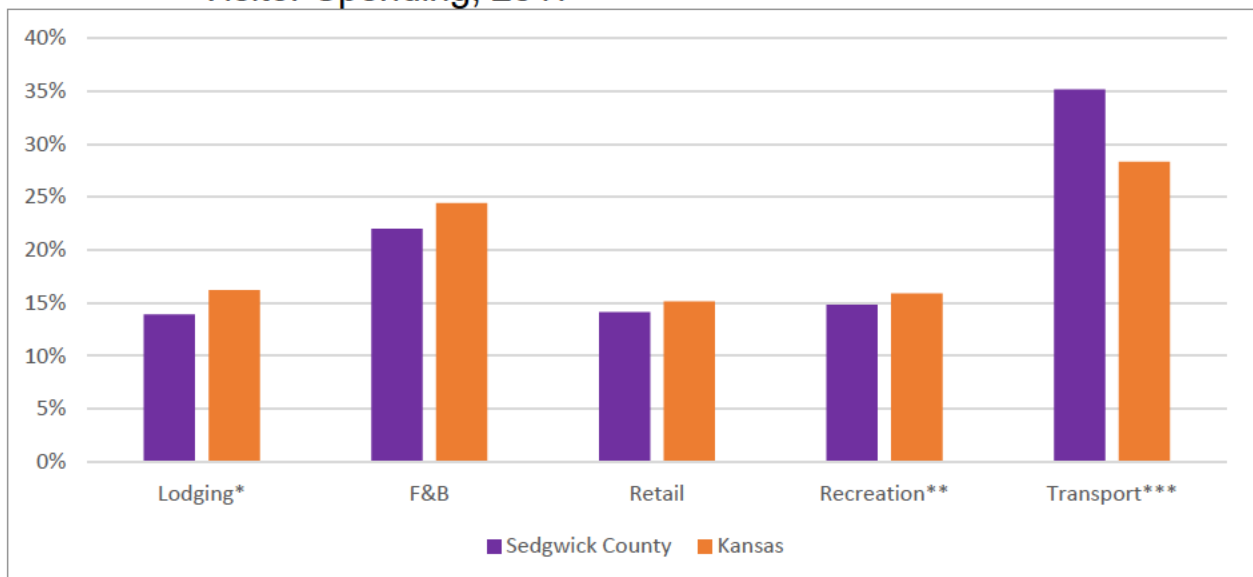
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 145: Sedgwick County Visitor Spending Category, Percent of Total Visitor Spending, 2015



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 146: Sedgwick County Visitor Spending Category, Percent of Total Visitor Spending, 2017



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

## K96 Greenwich STAR Bond project

The K96 and Greenwich STAR Bond project is several miles away from the Riverwalk STAR Bond projects and in a different ZIP code. It was also a “brown ground” project. Map 13 shows the area where this STAR Bond project will be developed. In 2002, much of the area north of K96 at Greenwich was farmland.

Map 13: K96 and Greenwich STAR Bond district, 4/2002



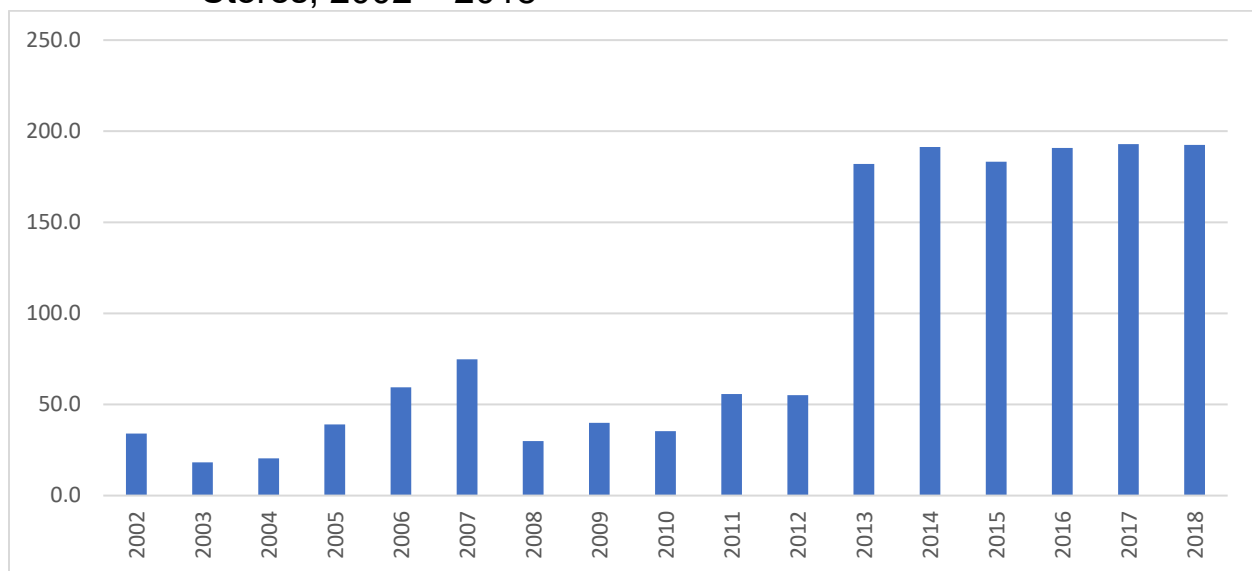
Source: USDA, retrieved from Google Earth.

## Labor Data by NAICS and ZIP

The charts in this section show the average annual number of employees, average wage, and total wages by three digit NAICS code and ZIP code for all businesses within the code category that were doing business in ZIP 67226. The underlying data is collected by the Kansas Department of Labor on a monthly basis for each quarter of the year. We use the data on an annual basis.

Graphs 147 through 149 show an increase in the number of employees of food and beverage stores occurred in 2013. The number of employees jumped from about 50 employees to almost 200 employees. Total wages and average wage also reflect this increase. This increase provides indirect evidence of the spillover economic effects that may occur near a STAR Bond project.

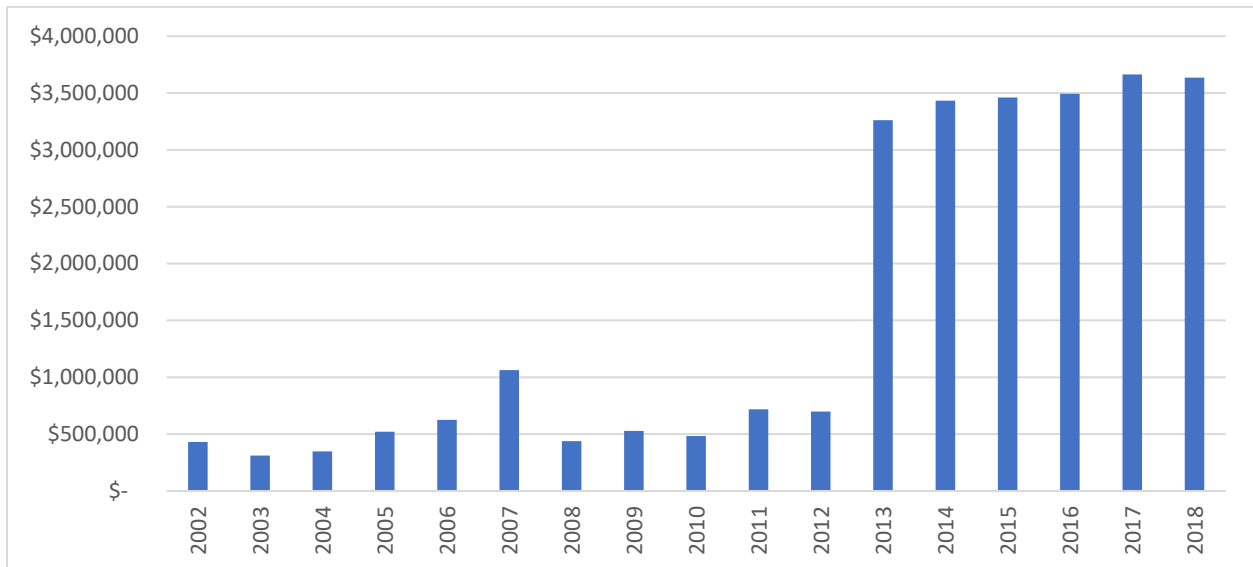
**Graph 147: ZIP 67226, Average Number of Employees, Food & Beverage Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

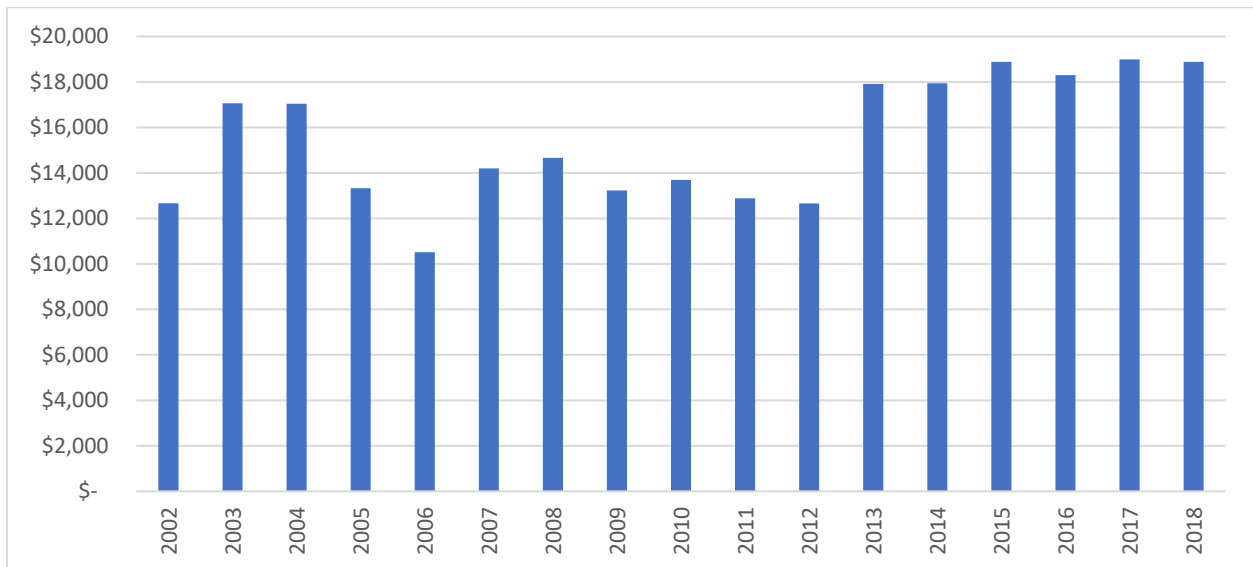


Graph 148: ZIP 67226, Total Wages, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 149: ZIP 67226, Average Wage, Food & Beverage Stores, 2002 – 2018

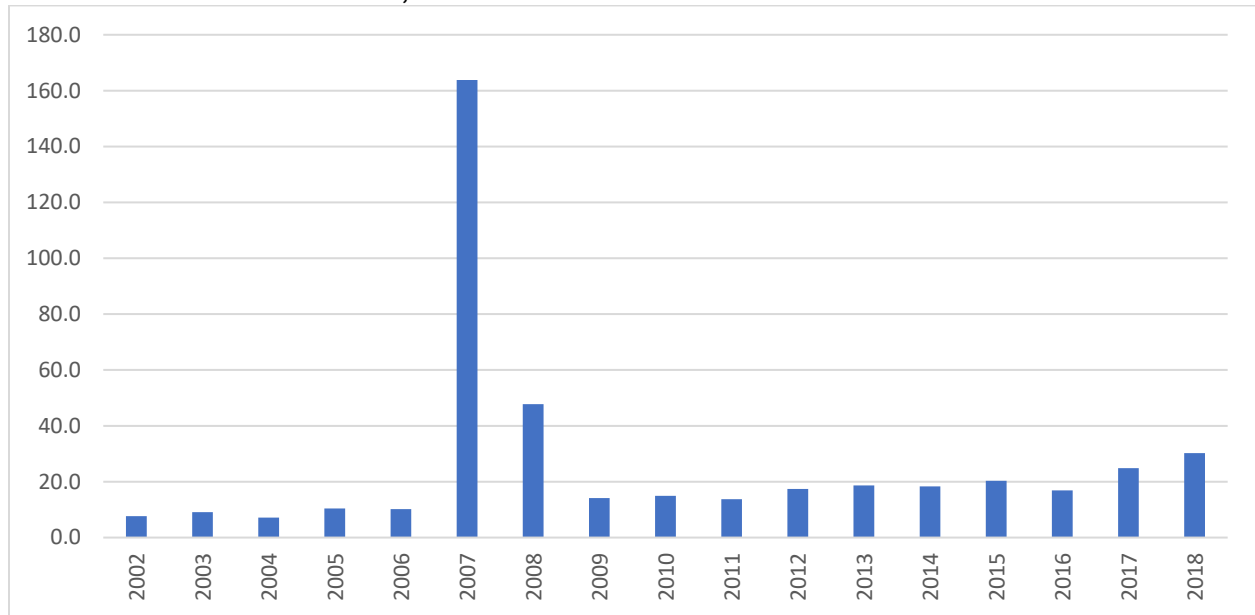


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 150 through 152 provide an illustrative example of an anomaly. We were unable to determine if the results from 2007 and 2008 represent a simple coding error or a short-lived business. The Department of Labor spreadsheets are very

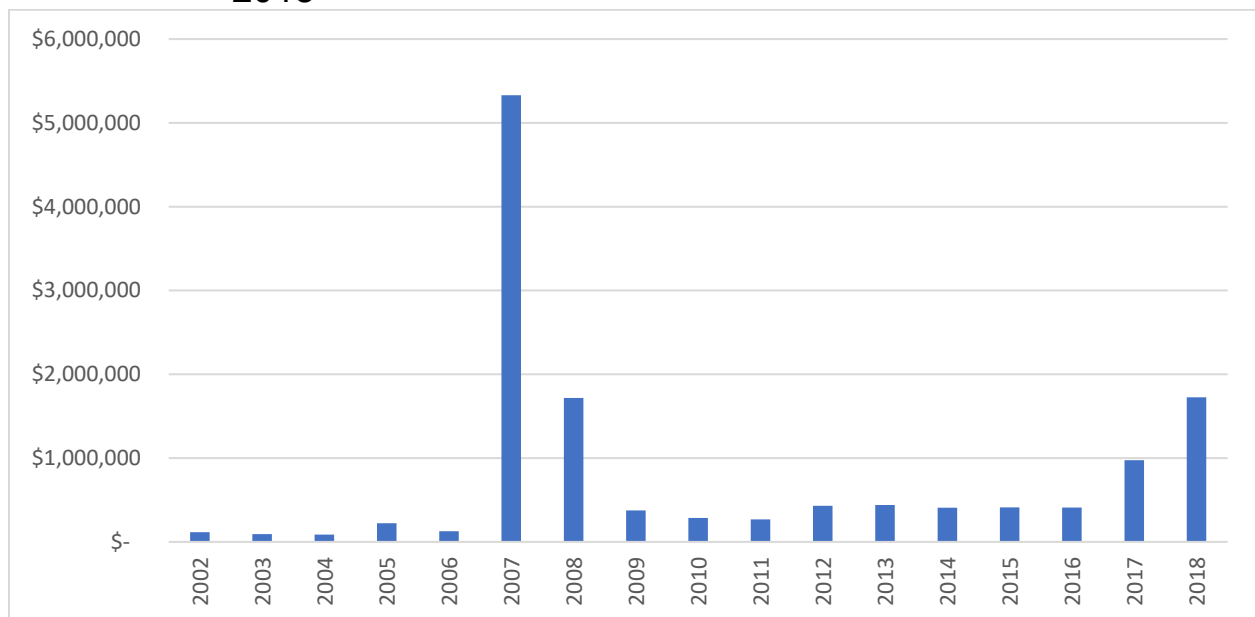
large (approximately 75 columns by 90,000 rows) and so the more likely explanation is a simple coding error.

Graph 150: ZIP 67226, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018



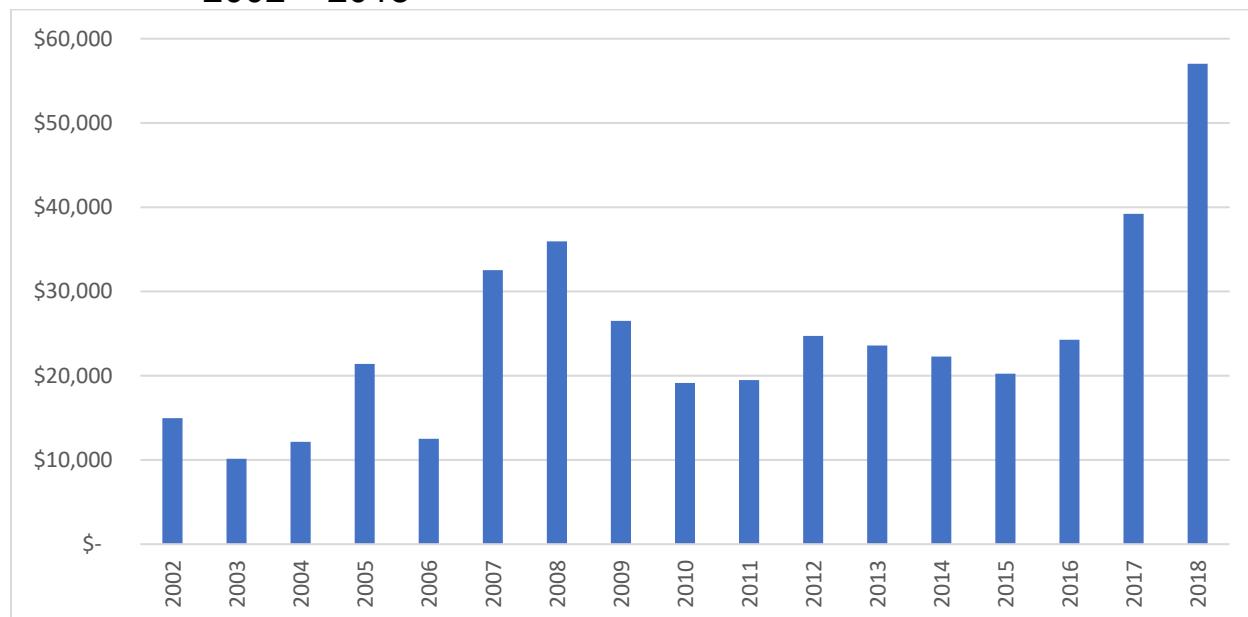
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 151: ZIP 67226, Total Wages, Health & Personal Care Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

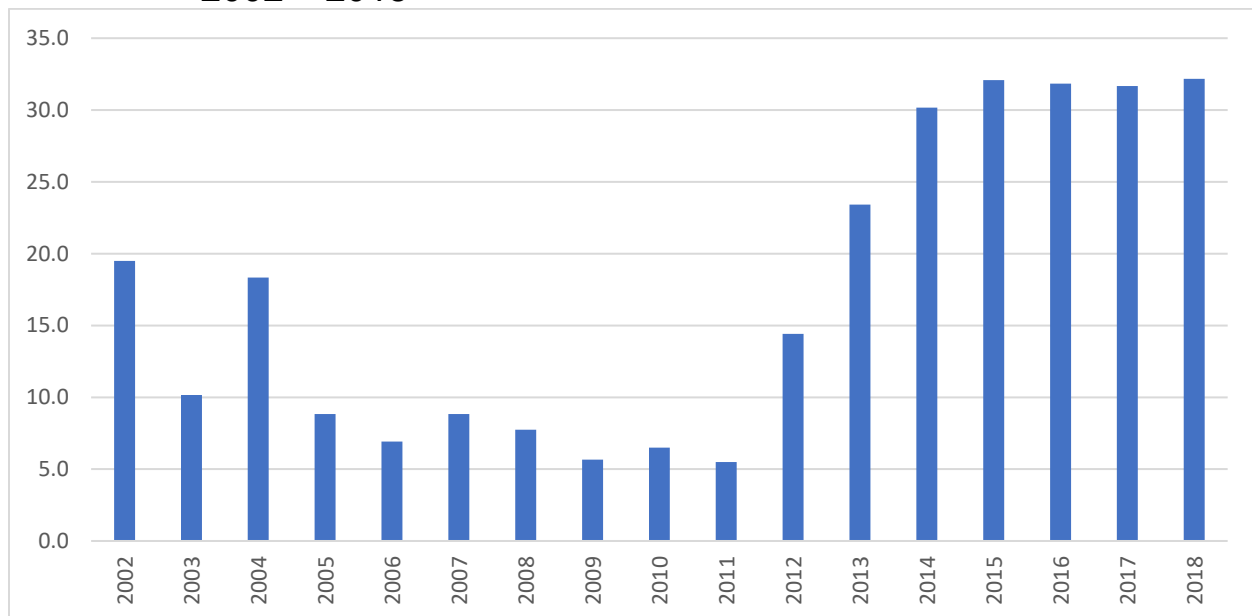
Graph 152: ZIP 67226, Average Wage, Health & Personal Care Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

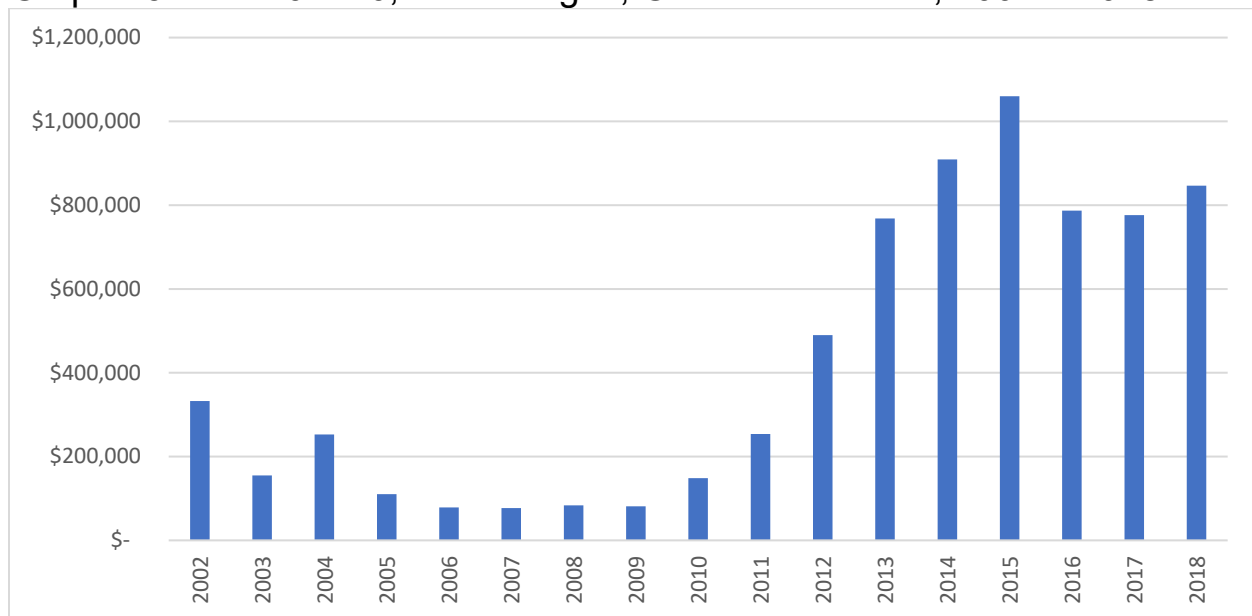
Graphs 153 through 155 provide indirect evidence of increased economic activity in ZIP code 67226. The number of gasoline store employees and their total wages shows a substantial and sustained increase starting in 2012. The positive effect on average wage is also observable.

**Graph 153: ZIP 67226, Average Number of Employees, Gasoline Stations, 2002 – 2018**



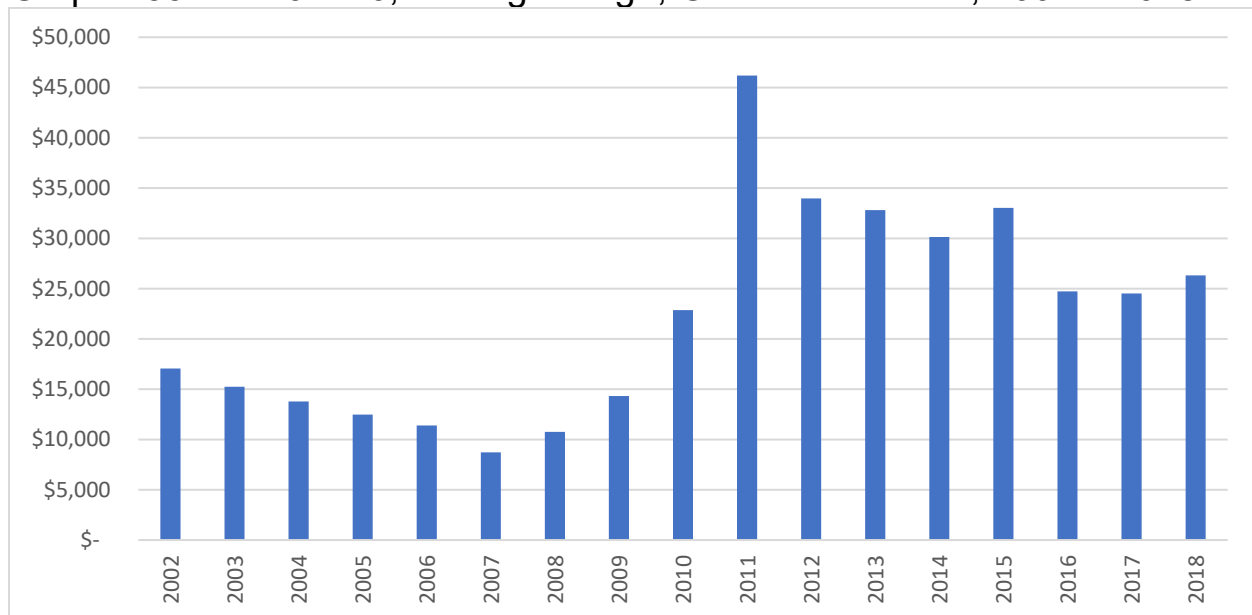
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 154: ZIP 67226, Total Wages, Gasoline Stations, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

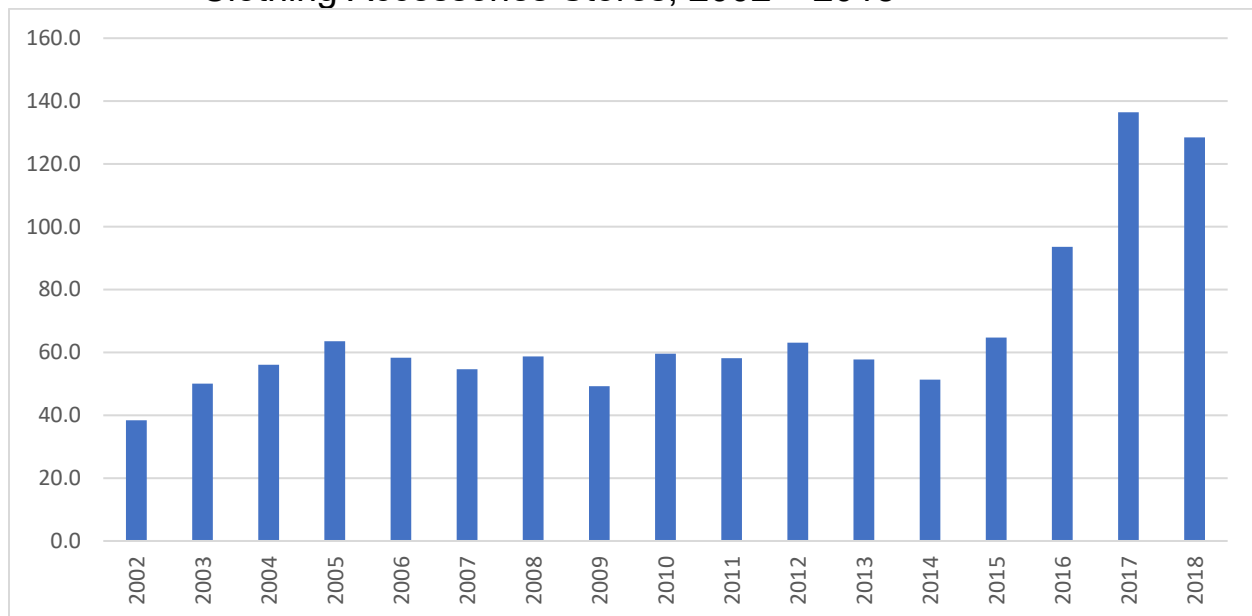
Graph 155: ZIP 67226, Average Wage, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

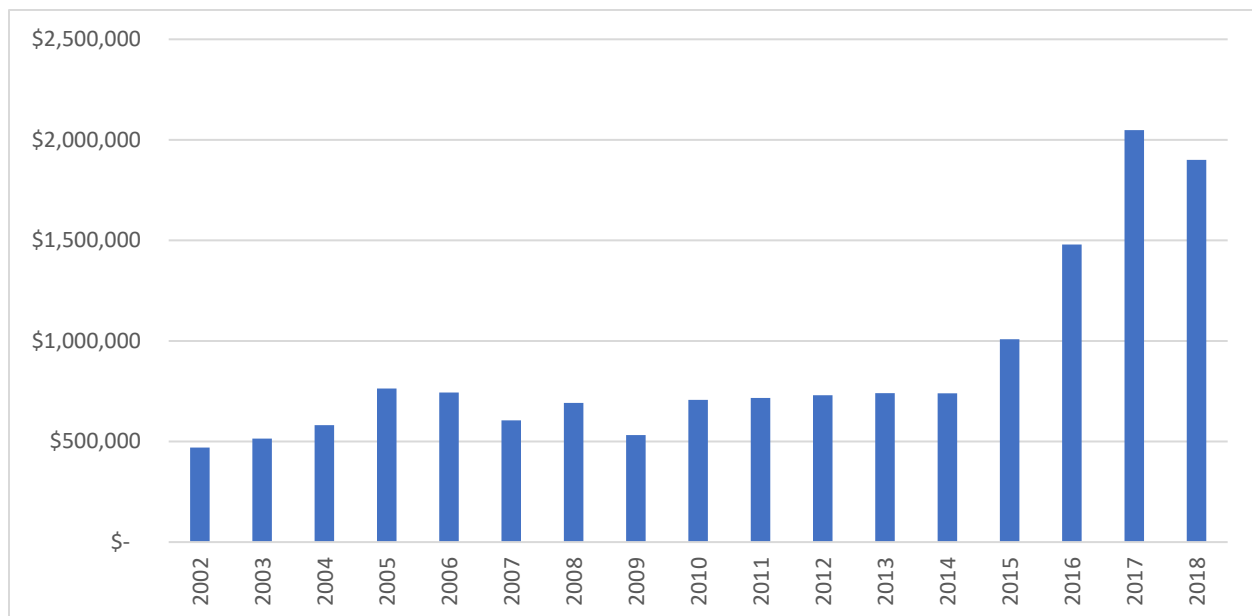
Graphs 156 through 158 also show an increase in business activity occurred in ZIP 67226 for clothing and clothing accessories stores. The increase began in 2016, slightly later than the increase that occurred in food and beverage stores and gasoline stations in this ZIP code. The increase can also be seen in the level of total wages and to a lesser extent in the average wage.

**Graph 156: ZIP 67226, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018**



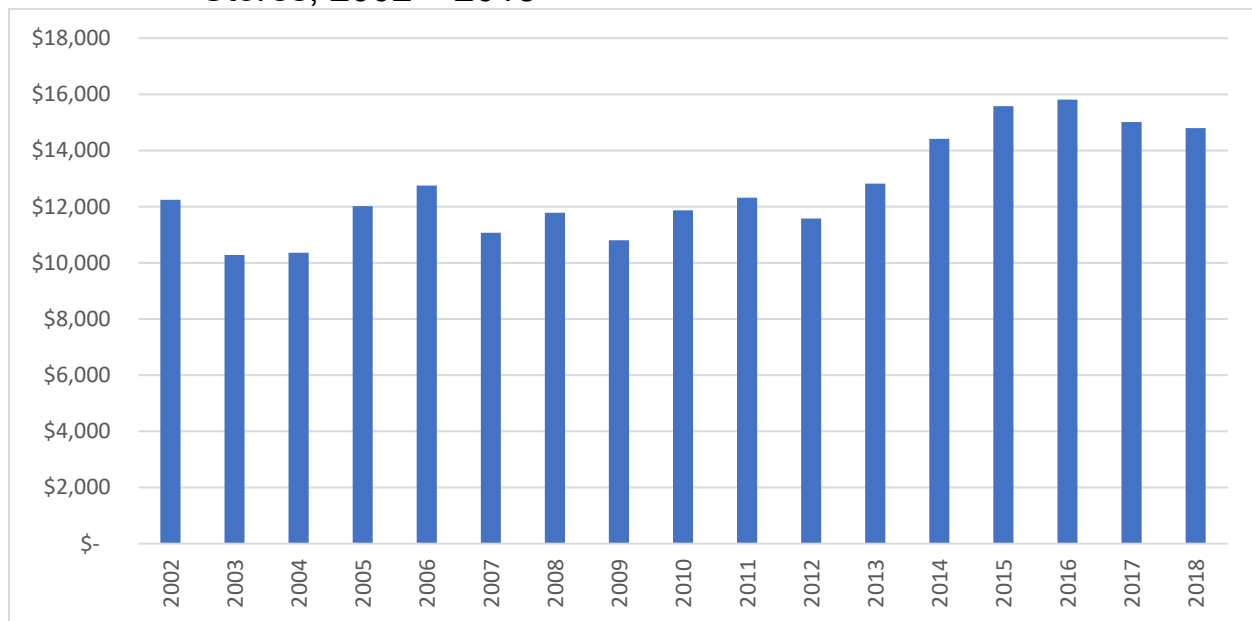
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 157: ZIP 67226, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

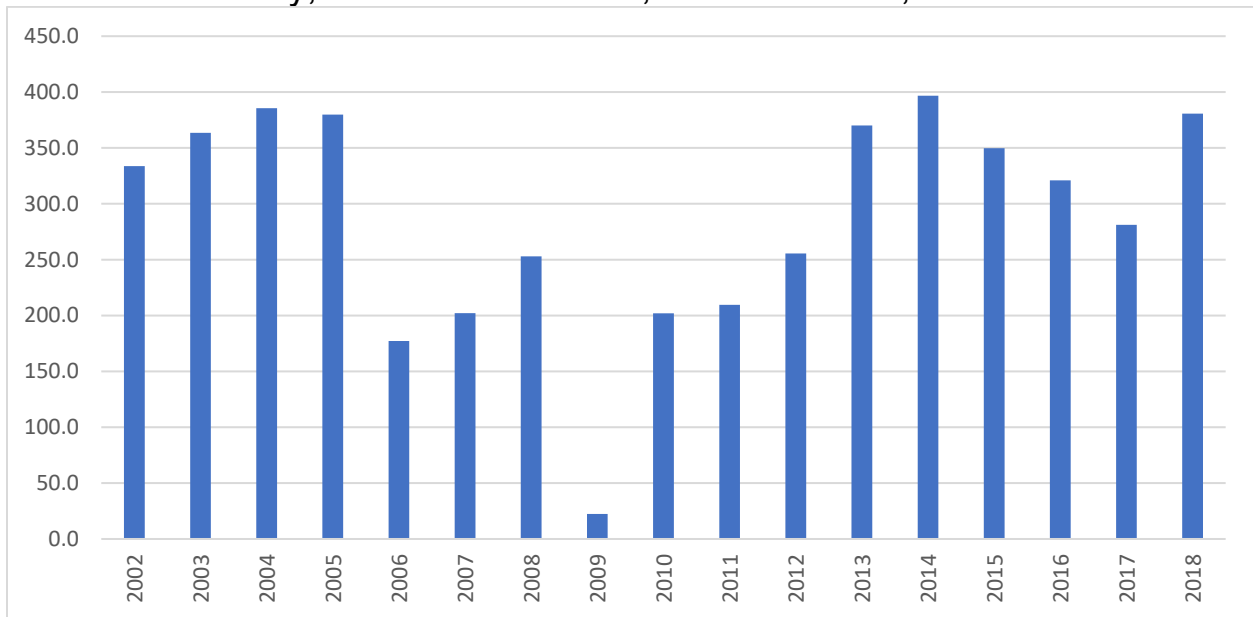
Graph 158: ZIP 67226, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

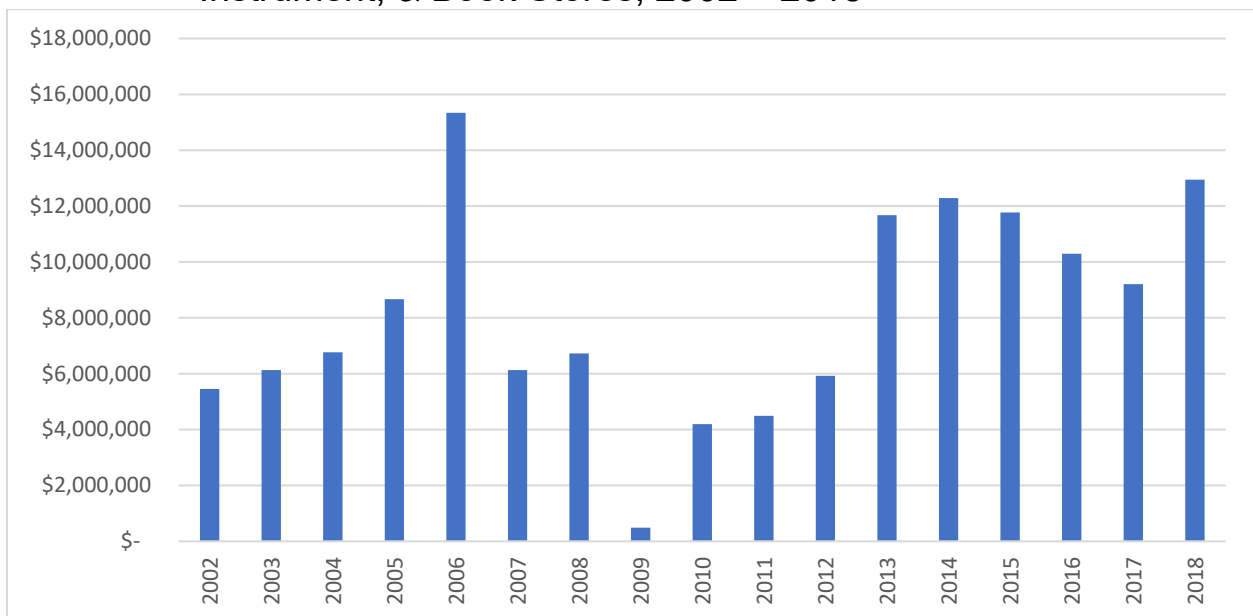
Graph 159 through 161 provide insight into the broad category of sporting goods, hobby, musical instrument, and book stores doing business in ZIP 67226. The fluctuation in the number of employees suggests both the closing and opening of business in this category. Such events are a normal part of an economy.

**Graph 159: ZIP 67226, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

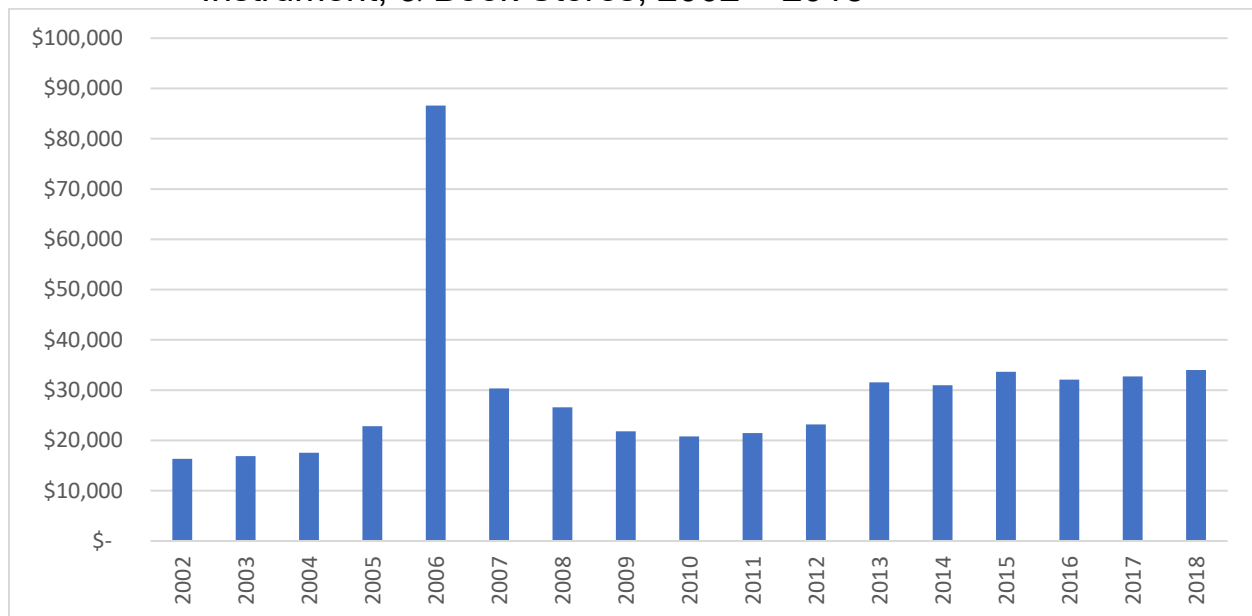
**Graph 160: ZIP 67226, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



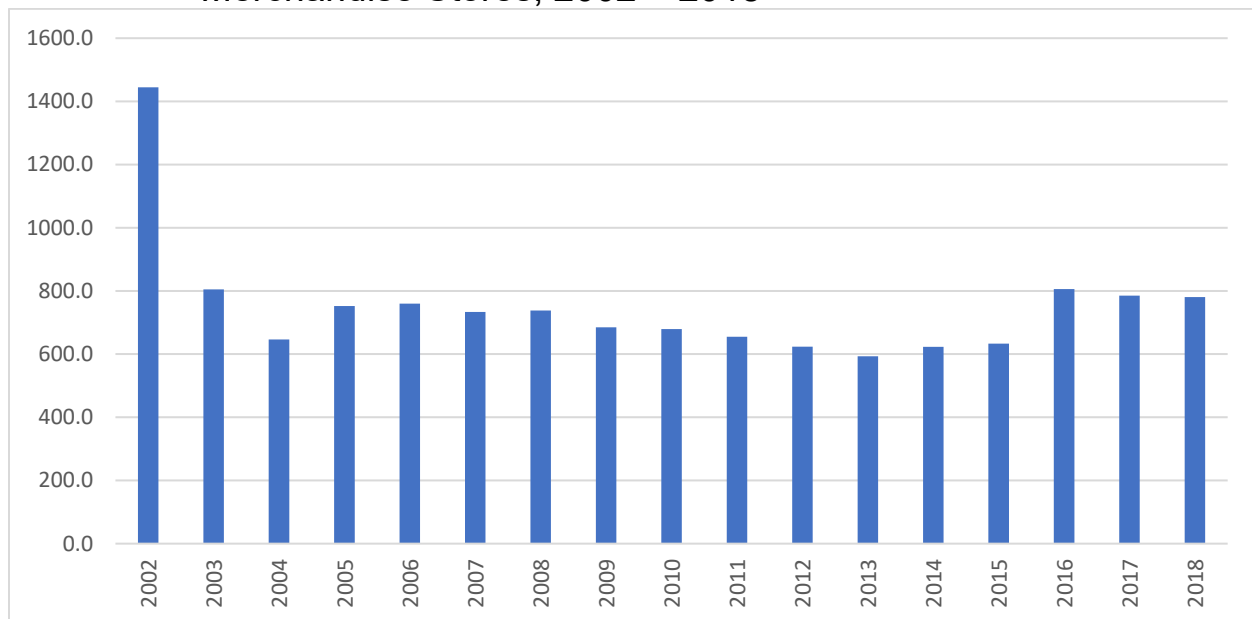
Graph 161: ZIP 67226, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

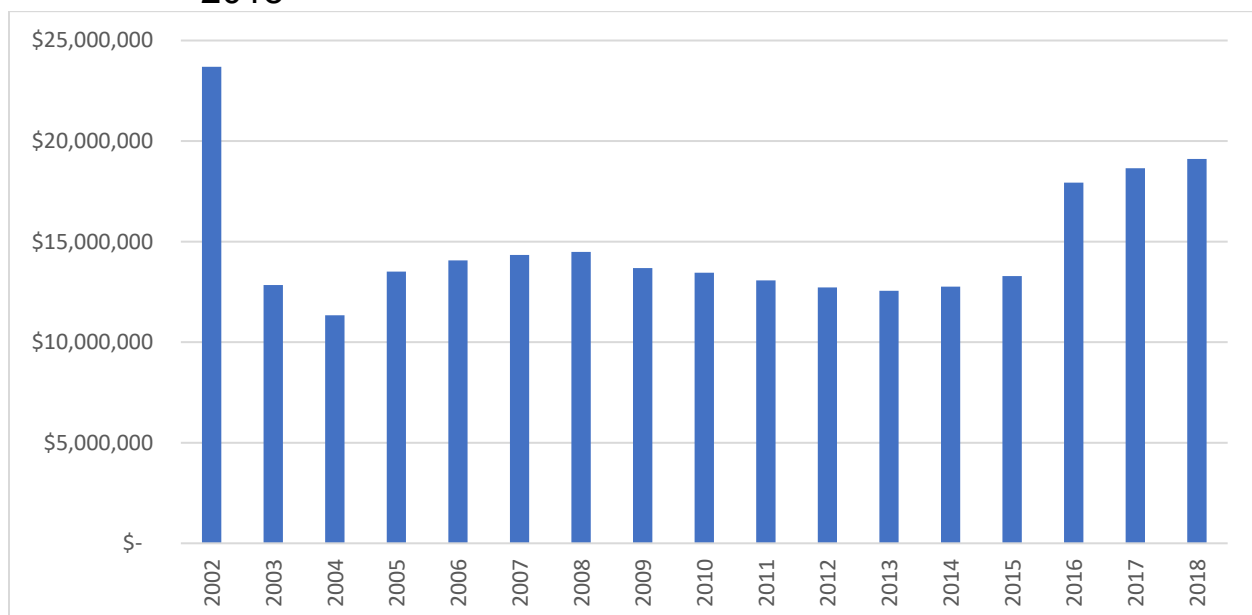
Graphs 162 through 164 provide additional indirect evidence of the possible spillover effects from the K96 and Greenwich STAR Bond project. The number of employees and total wages for general merchandise stores increased in 2016. There were almost 200 additional employees and total wages increased by more than \$4,000,000.

**Graph 162: ZIP 67226, Average Number of Employees, General Merchandise Stores, 2002 – 2018**



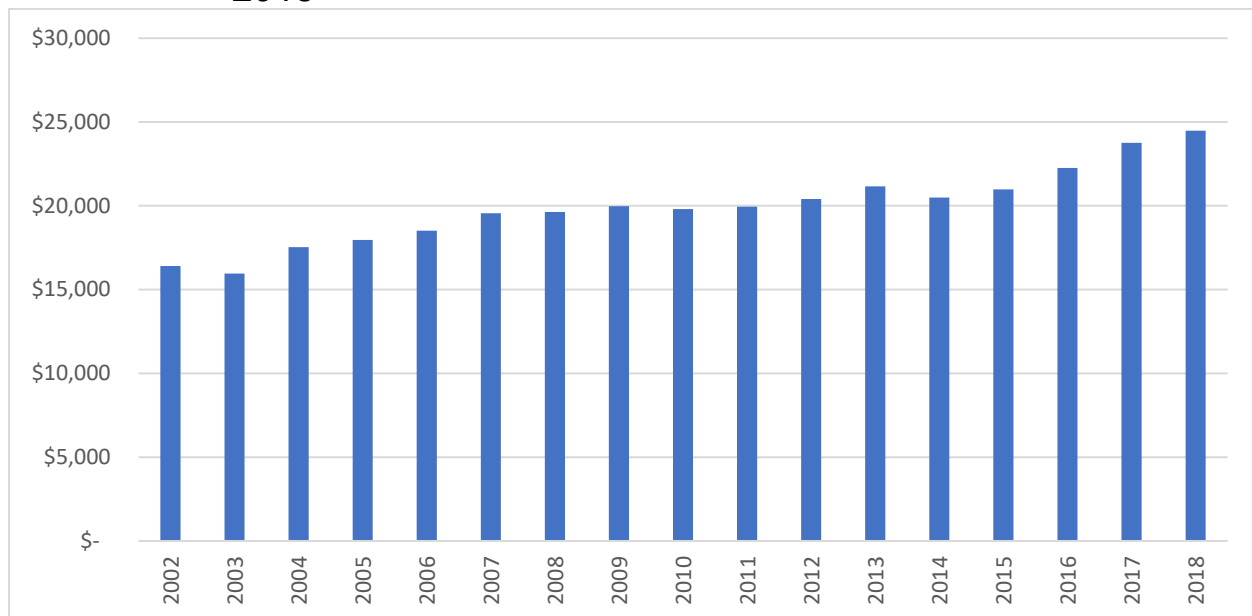
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 163: ZIP 67226, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

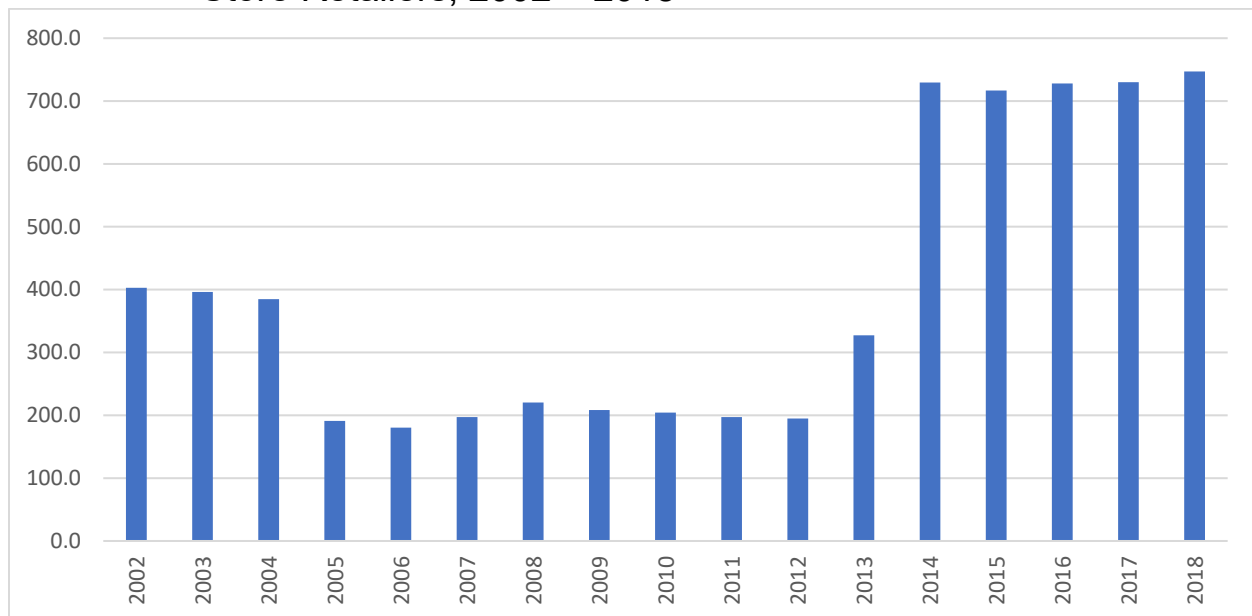
Graph 164: ZIP 67226, Average Wage, General Merchandise Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

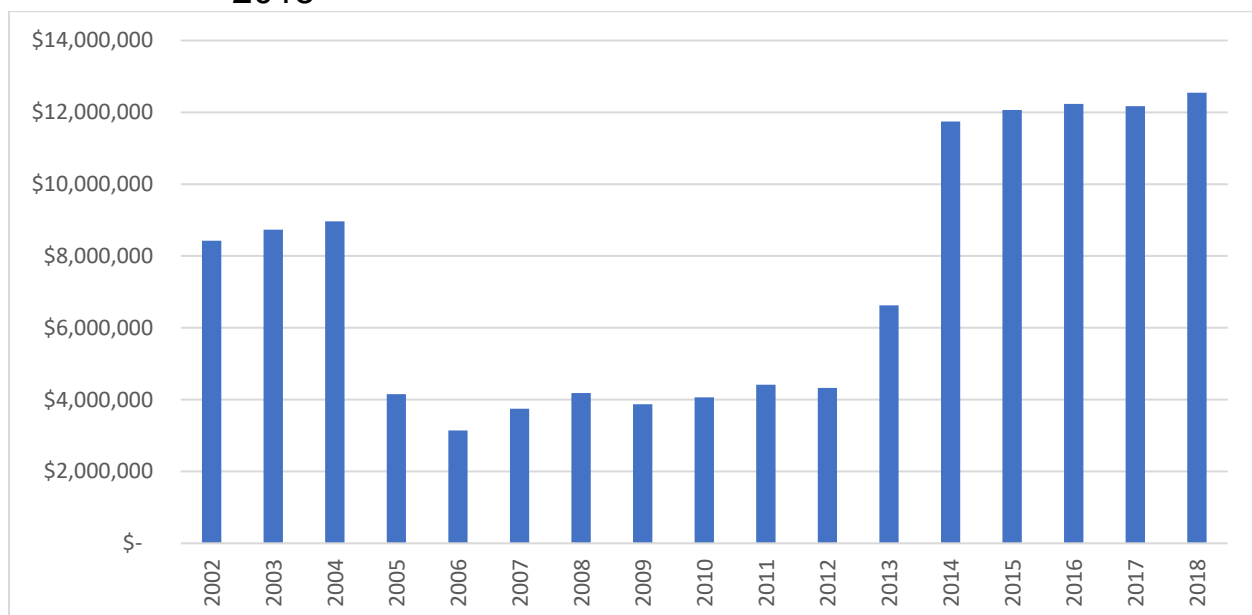
Graphs 165 through 167 show a doubling of the number of employees for miscellaneous store retailers occurred in 2014. At the same time total wages increase to about \$12,000,000 per year. Clearly, the retail sector in ZIP 67226 was positively affected by an economic event around 2013 or 2014.

**Graph 165: ZIP 67226, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



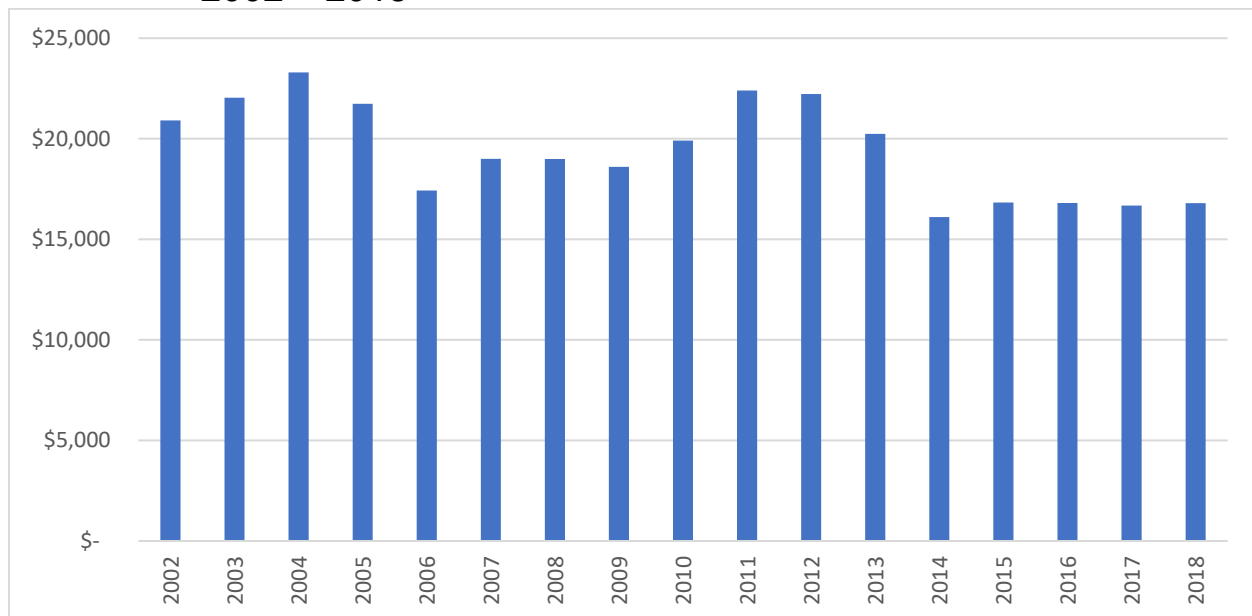
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 166: ZIP 67226, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

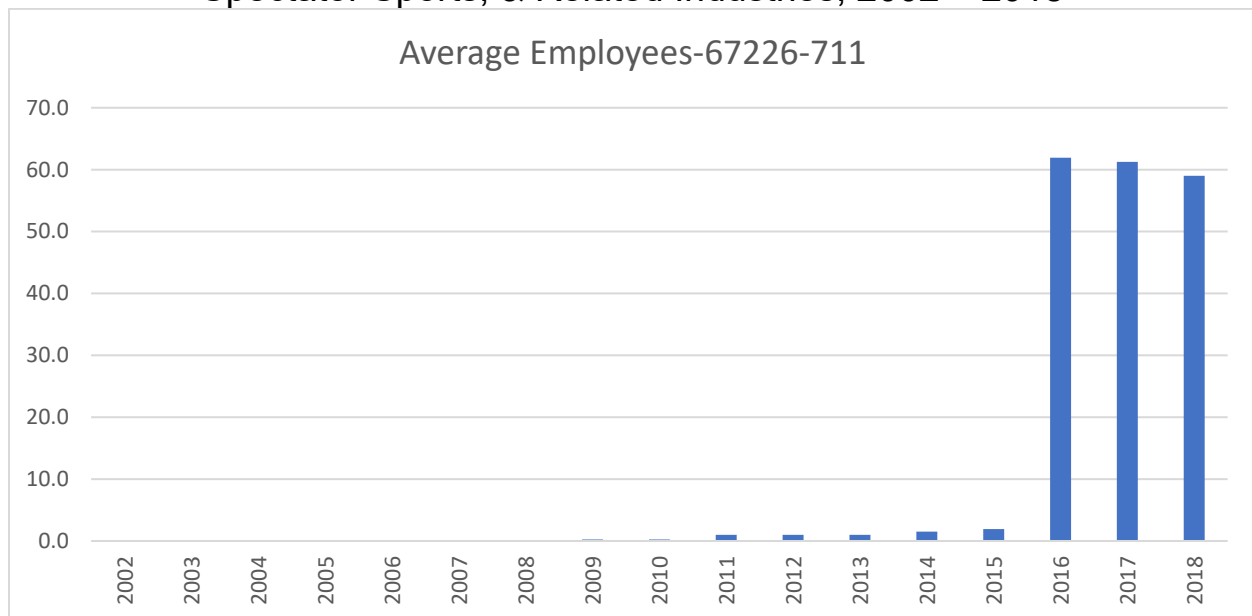
Graph 167: ZIP 67226, Average Wage, Miscellaneous Store Retailers, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

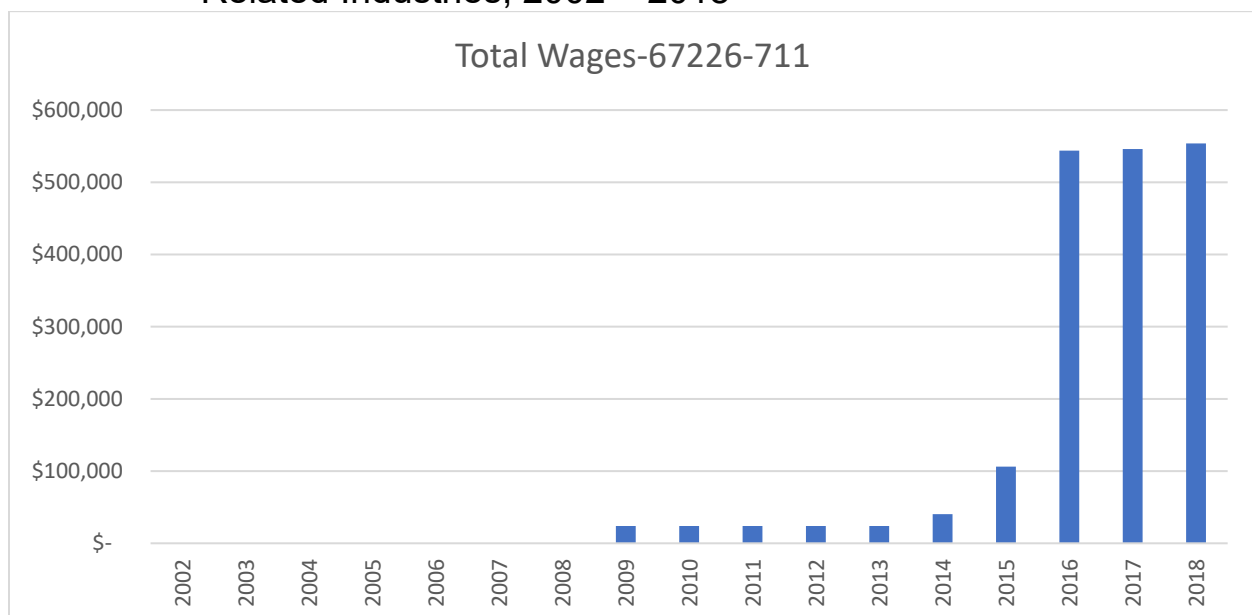
Graphs 168 through 170 show that the number of employees, although small, increased substantially in 2016 in the classification, performing arts, spectator sports, and related industries, in ZIP code 67226. Total wages for these employees were more than \$500,000 for the last three years of reported data.

**Graph 168: ZIP 67226, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



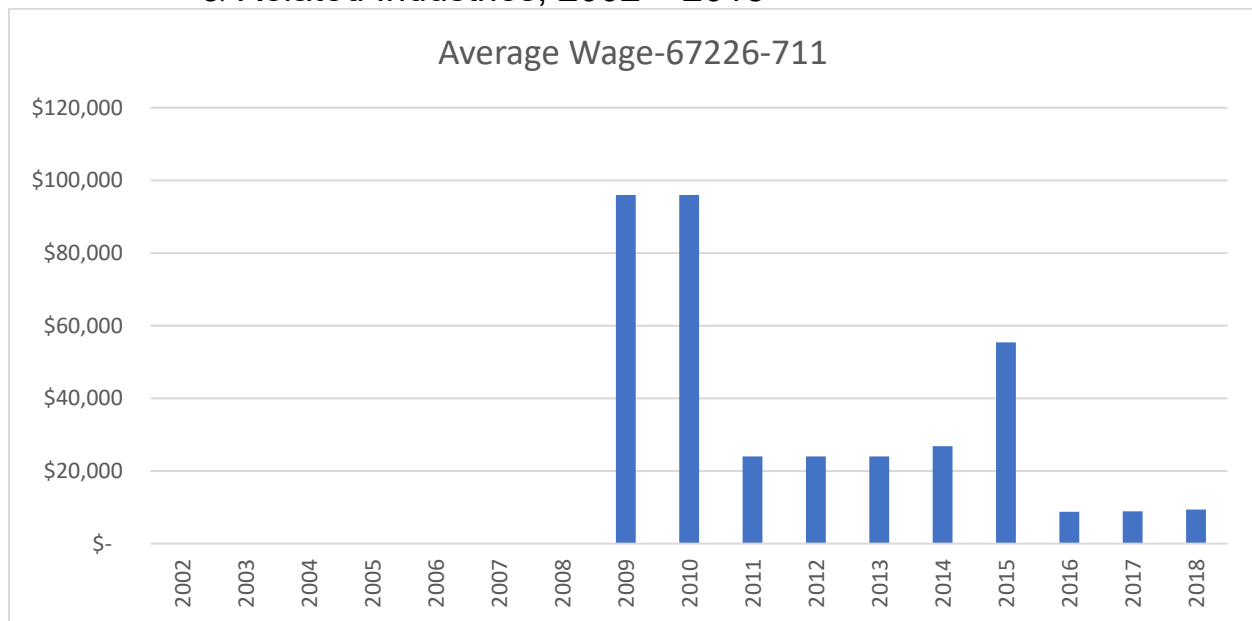
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 169: ZIP 67226, Total Wages, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 170: ZIP 67226, Average Wage, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018

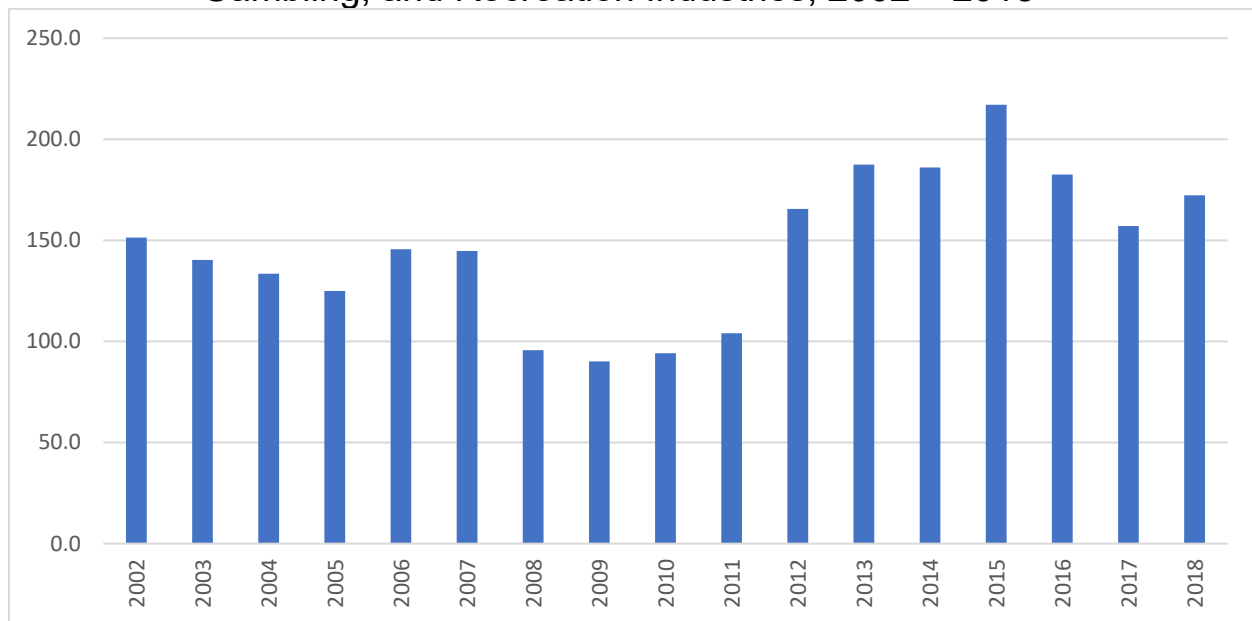


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

There were no employees during the period in the category of museums, historical sites, and similar institutions in ZIP code 67226.

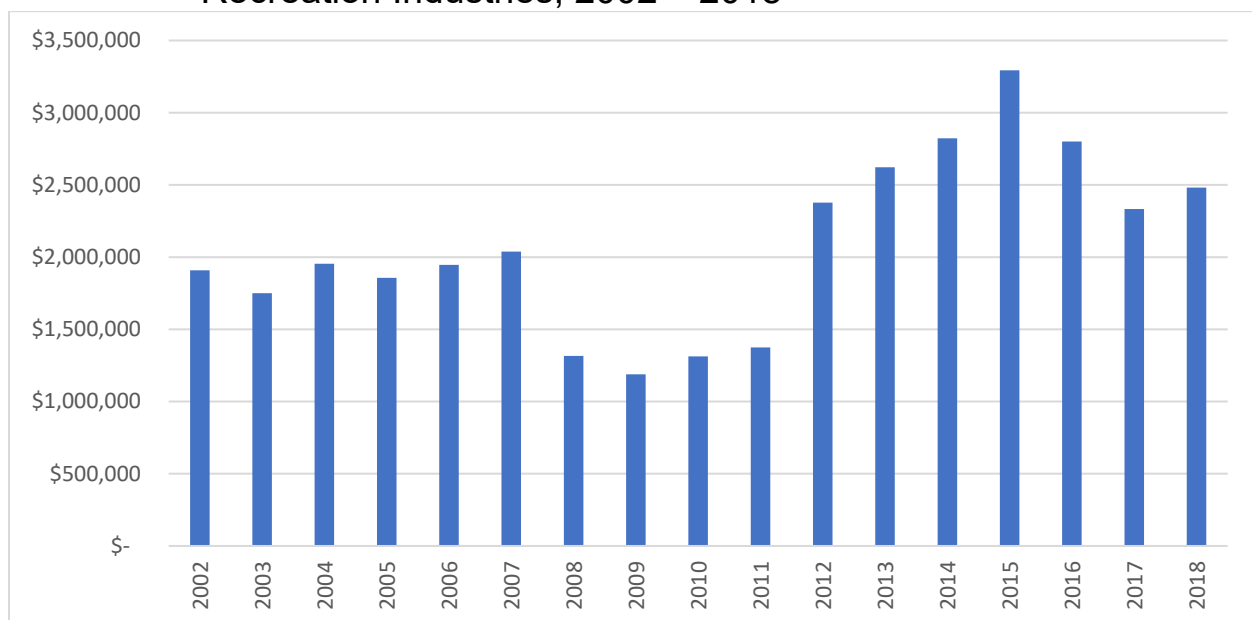
Graphs 171 through 173 suggest a slight increase in this economic sector in ZIP code 67226 starting in 2012. The number of employees and the total wages both show increases.

**Graph 171: ZIP 67226, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

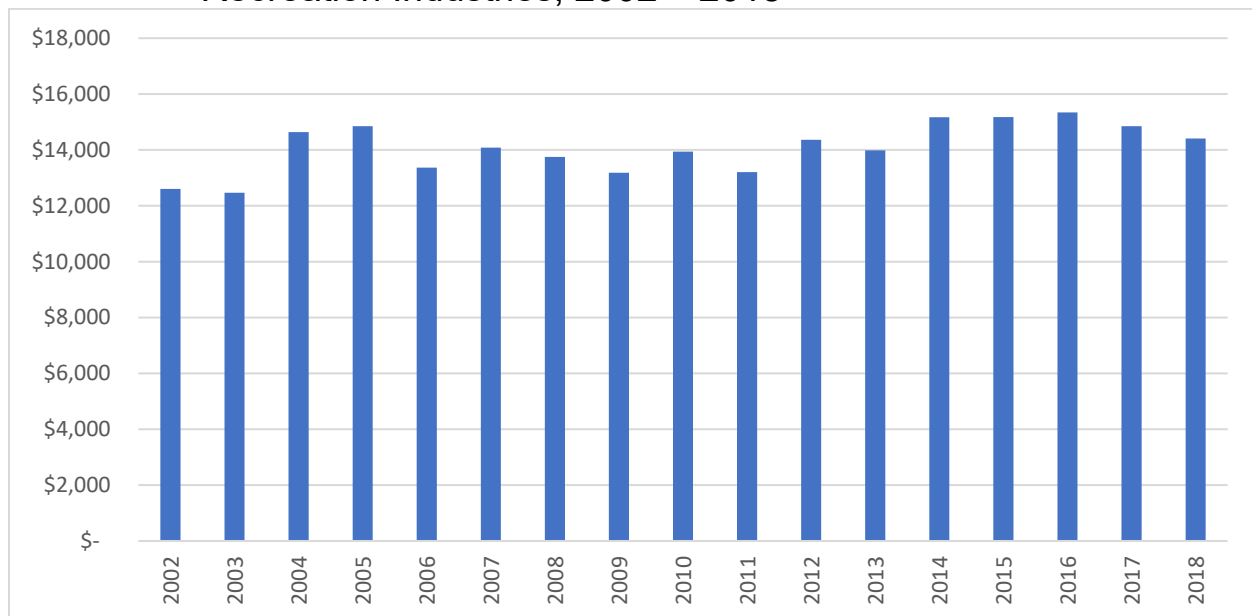
**Graph 172: ZIP 67226, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



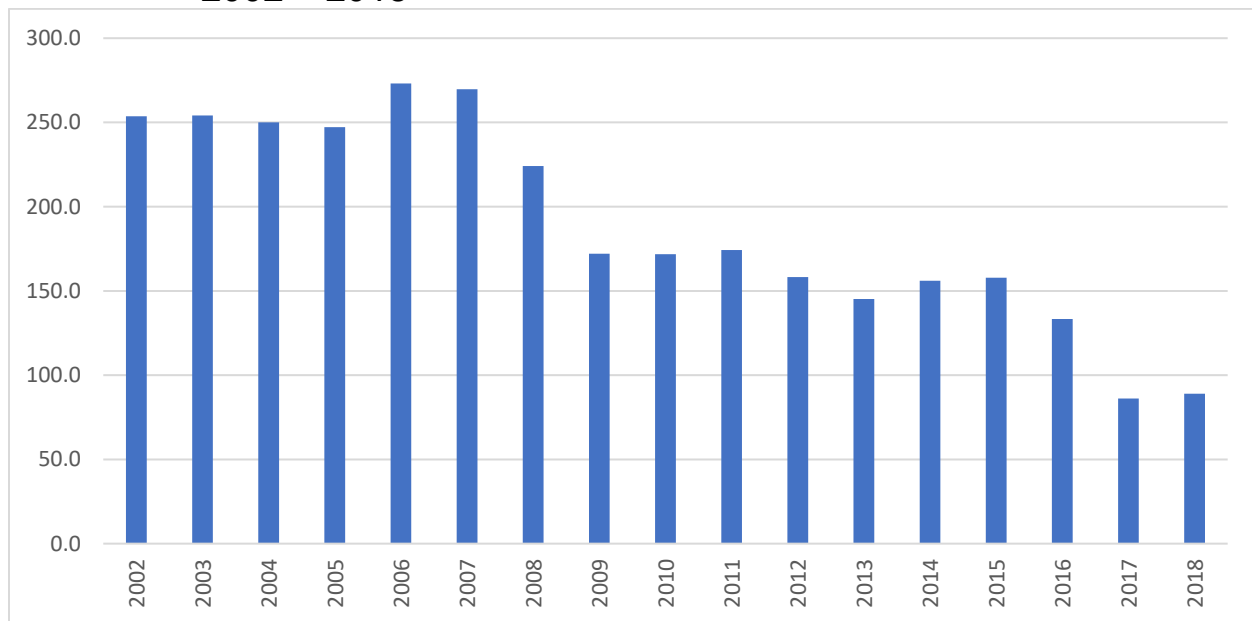
Graph 173: ZIP 67226, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

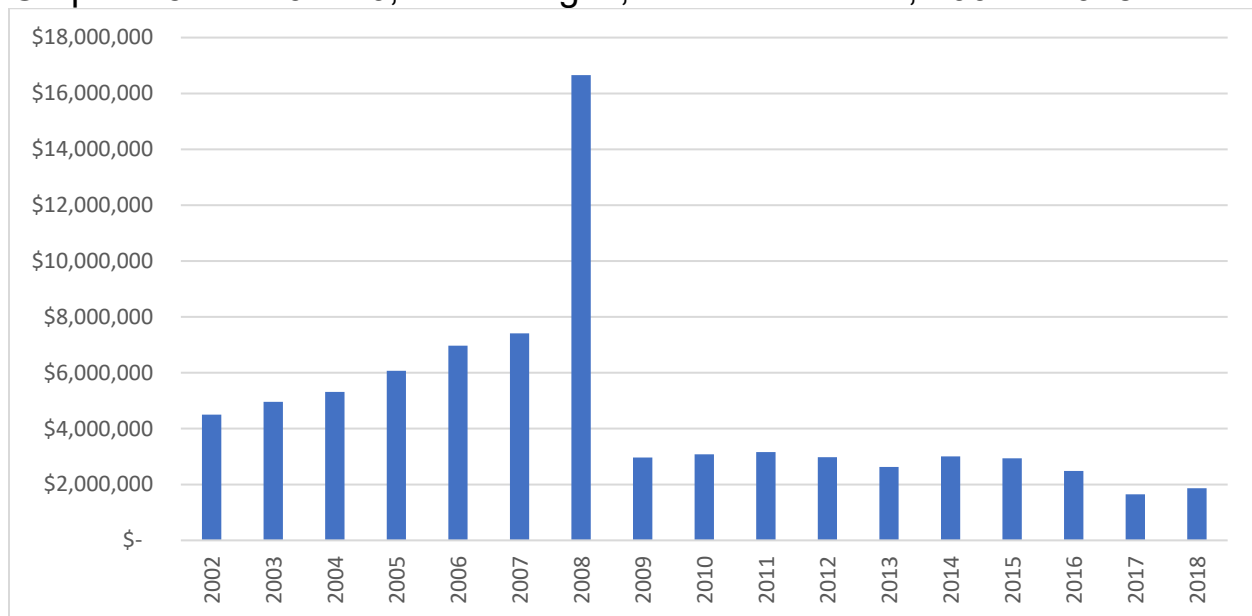
Graphs 174 through 176 show that the accommodation sector in ZIP code 67226 has actually shrunk since 2007 in ZIP code 67226 when measured by either number of employees or total wages.

Graph 174: ZIP 67226, Average Number of Employees, Accommodation, 2002 – 2018



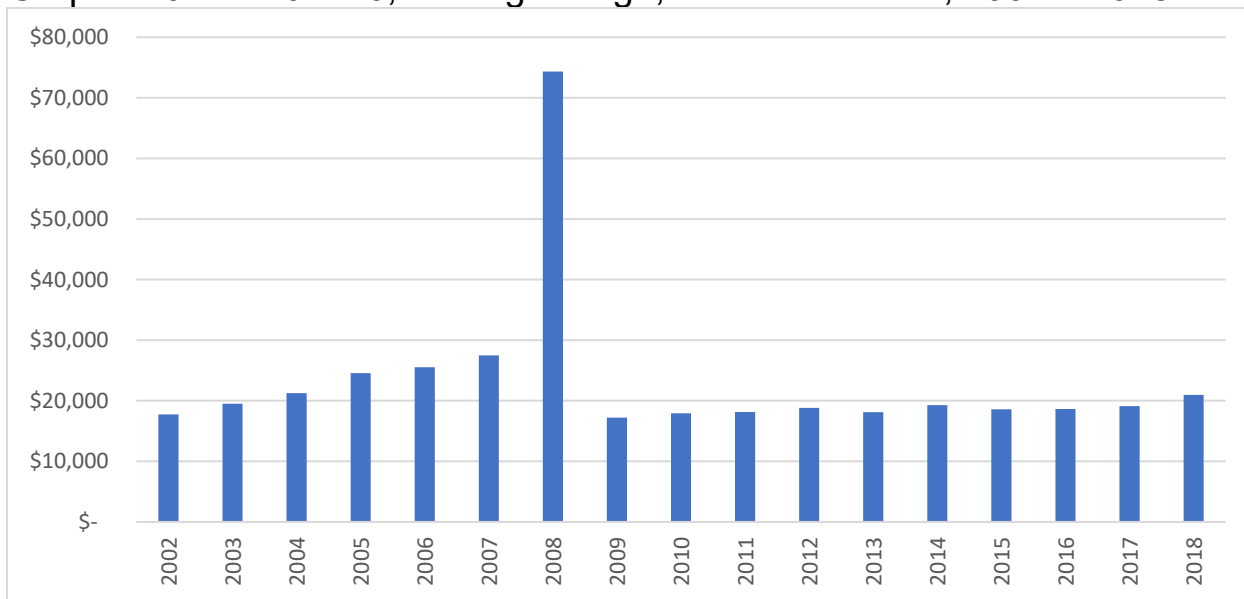
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 175: ZIP 67226, Total Wages, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

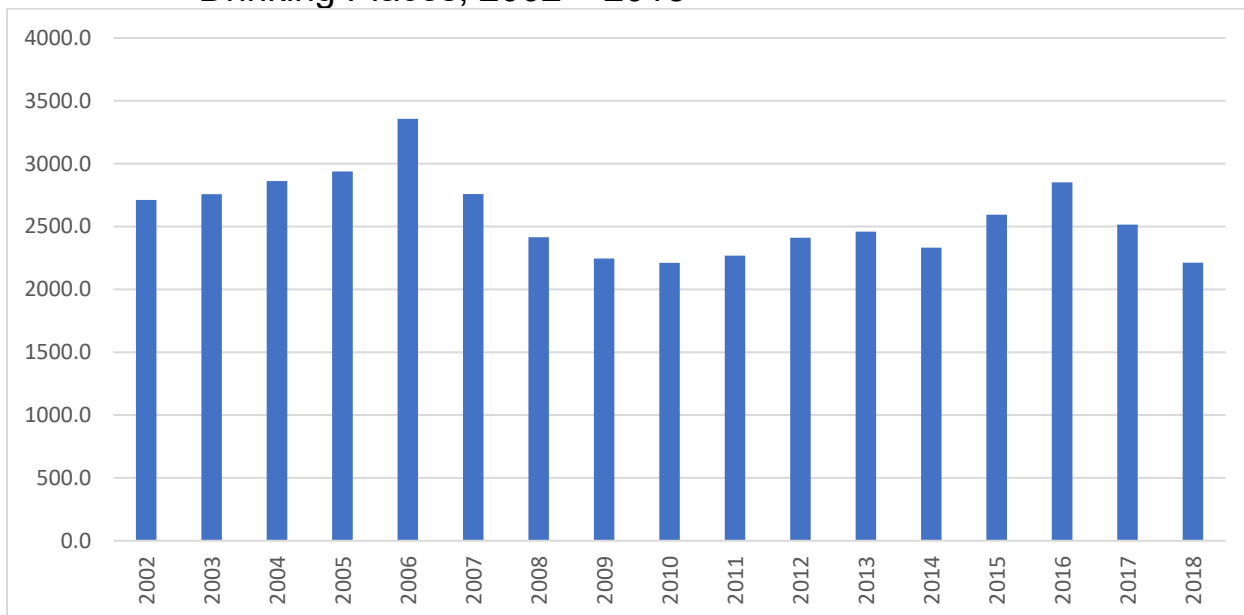
**Graph 176: ZIP 67226, Average Wage, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

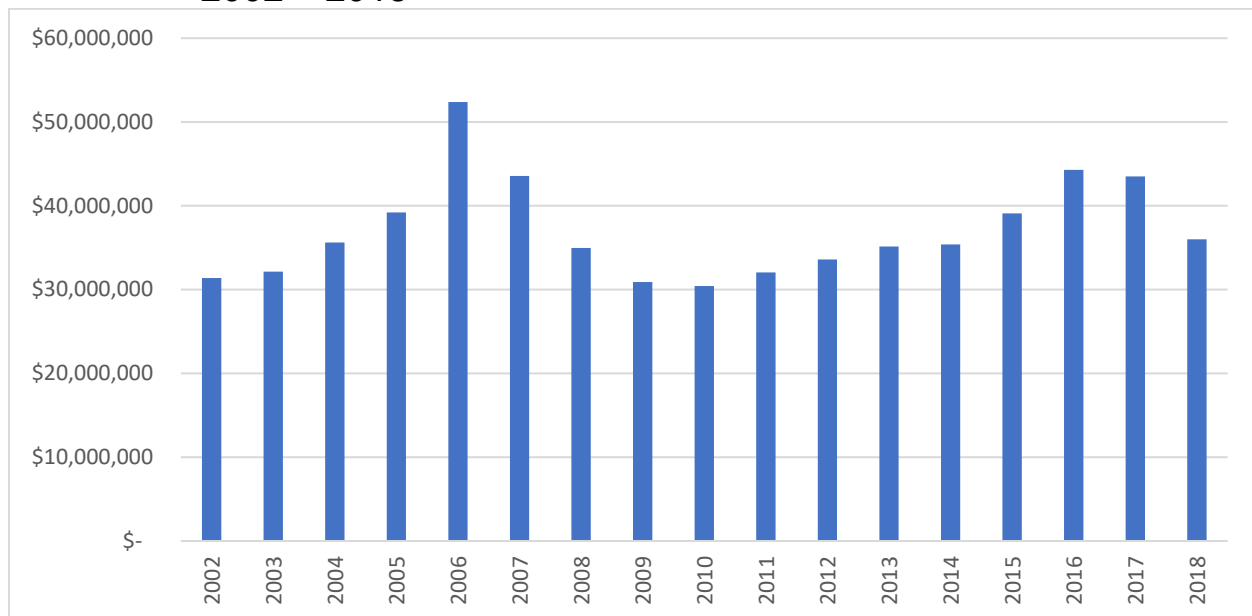
Graphs 177 through 179 show that number of employees of food services and drinking places has decreased slightly since 2002 there are still more than 2,000 people employed in this sector in ZIP code 67226.

**Graph 177: ZIP 67226, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



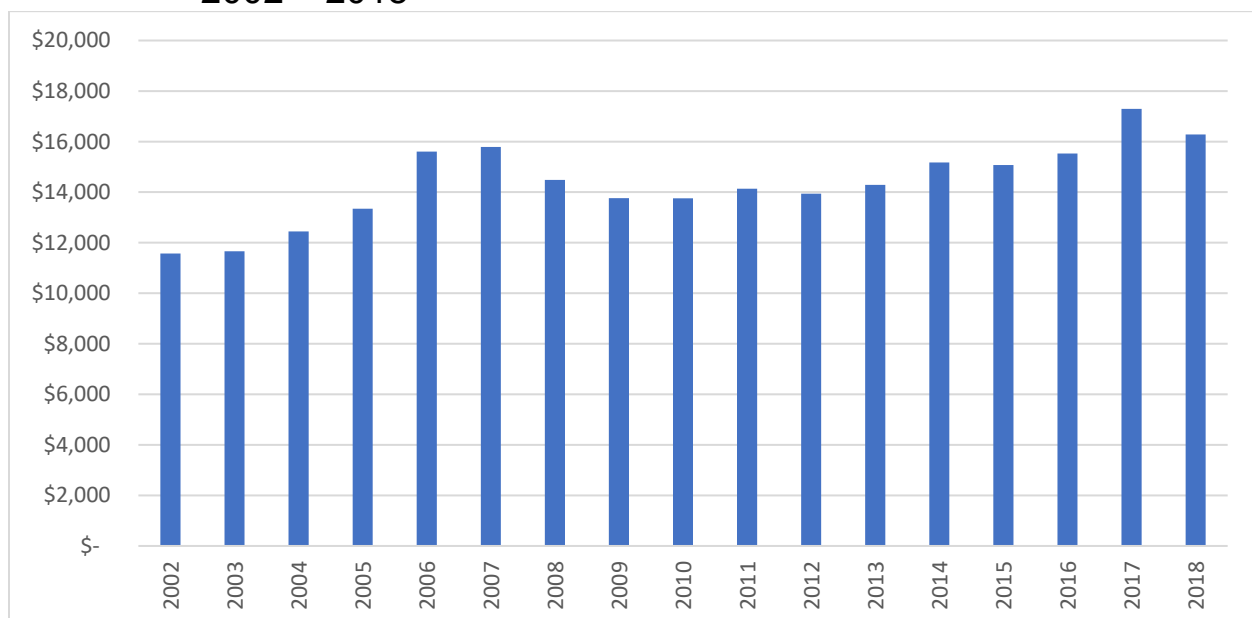
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 178: ZIP 67226, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 179: ZIP 67226, Average Wage, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

## K96 and Greenwich Area Building Permits

Building permits are required when remodeling buildings or constructing new ones. The following information provides insight into both new construction and remodeling activities within the K96 and Greenwich STAR Bond project area and in the nearby area outside the STAR Bond district. The Wichita building permit data<sup>6</sup> shows that the value of commercial building permits issued from 2008 – 2011 within the area that became the STAR Bond district was zero dollars. The value of commercial building permits issued from 2012 – 2019 within the STAR Bond district was \$32,403,588.

The value of commercial building permits issued from 2008 – 2011 adjacent to the K96 and Greenwich STAR Bond district was zero. The value of commercial building permits adjacent to K96/Greenwich, 2012 – 2019 was \$17,056,491.

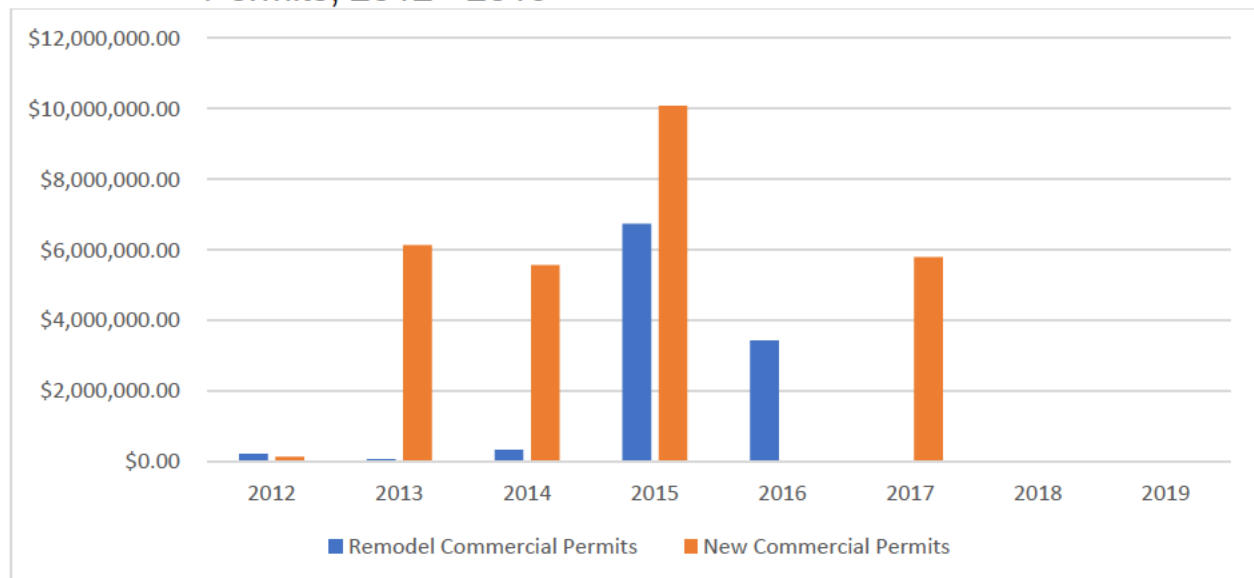
Value of residential building permits adjacent to K96/Greenwich, 2008 – 2011 was zero dollars. Value of residential building permits adjacent to K96/Greenwich, 2012 – 2019 was \$35,012,399.82.

There is strong evidence from the commercial and residential building permit data that the K96 and Greenwich STAR Bond district had significant economic impact both within and adjacent to its boundaries.

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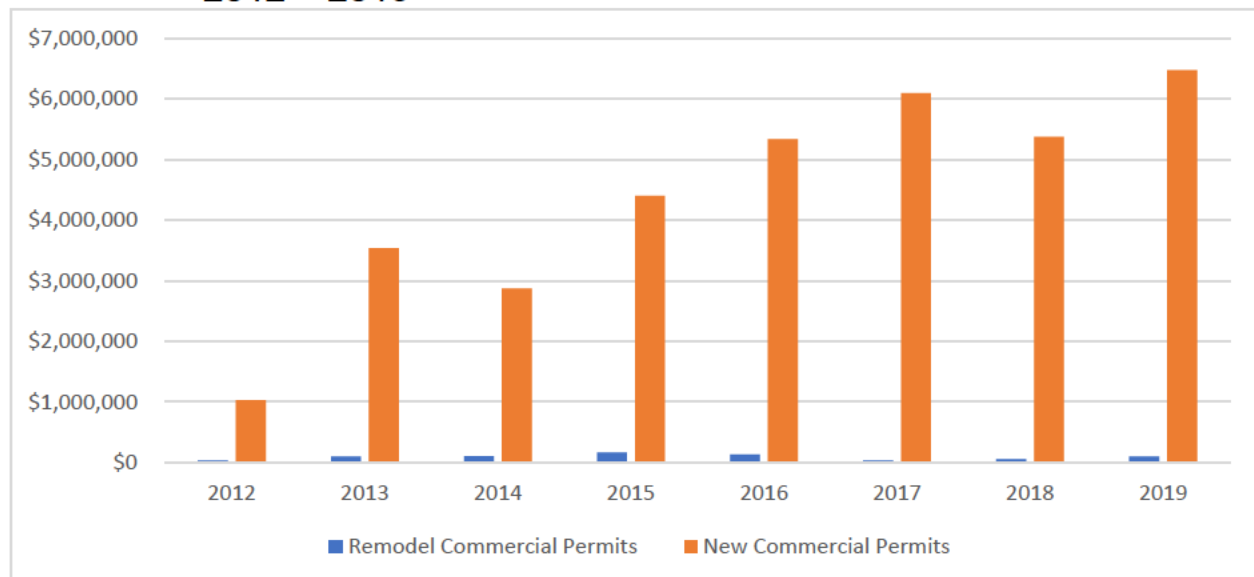
<sup>6</sup> Permits issued by map no Mark Elder COM New and Rem K96.xlsx and Permits Issue by Map No Mark Elder RES New and Rem K96 All Adjacent.xlsx.

**Graph 180: K96/Greenwich STAR Bond District Commercial Building Permits, 2012 - 2019**



Source: Permits Issued by Map No Mark Elder COM New and Rem K96 v2.xlsx

**Graph 181: Value of Building Permits, K96 and Greenwich Adjacent Area, 2012 – 2019**



Source: City of Wichita

Table 31: Value of Building Permits, K96 and Greenwich Adjacent Area,  
2012 - 2019

Year	2012	2013	2014	2015	2016	2017	2018	2019
Remodel Commercial Permits	\$27,781	\$98,345	\$103,475	\$159,700	\$130,180	\$27,500	\$54,867	\$96,489
New Commercial Permits	\$1,028,326	\$3,538,070	\$2,872,838	\$4,401,640	\$5,339,398	\$6,096,221	\$5,377,327	\$6,479,189

Source: City of Wichita

K96 Greenwich STAR Bond project

Begin date 2014

Sales Tax through 2019 = \$ 33,223,247.45

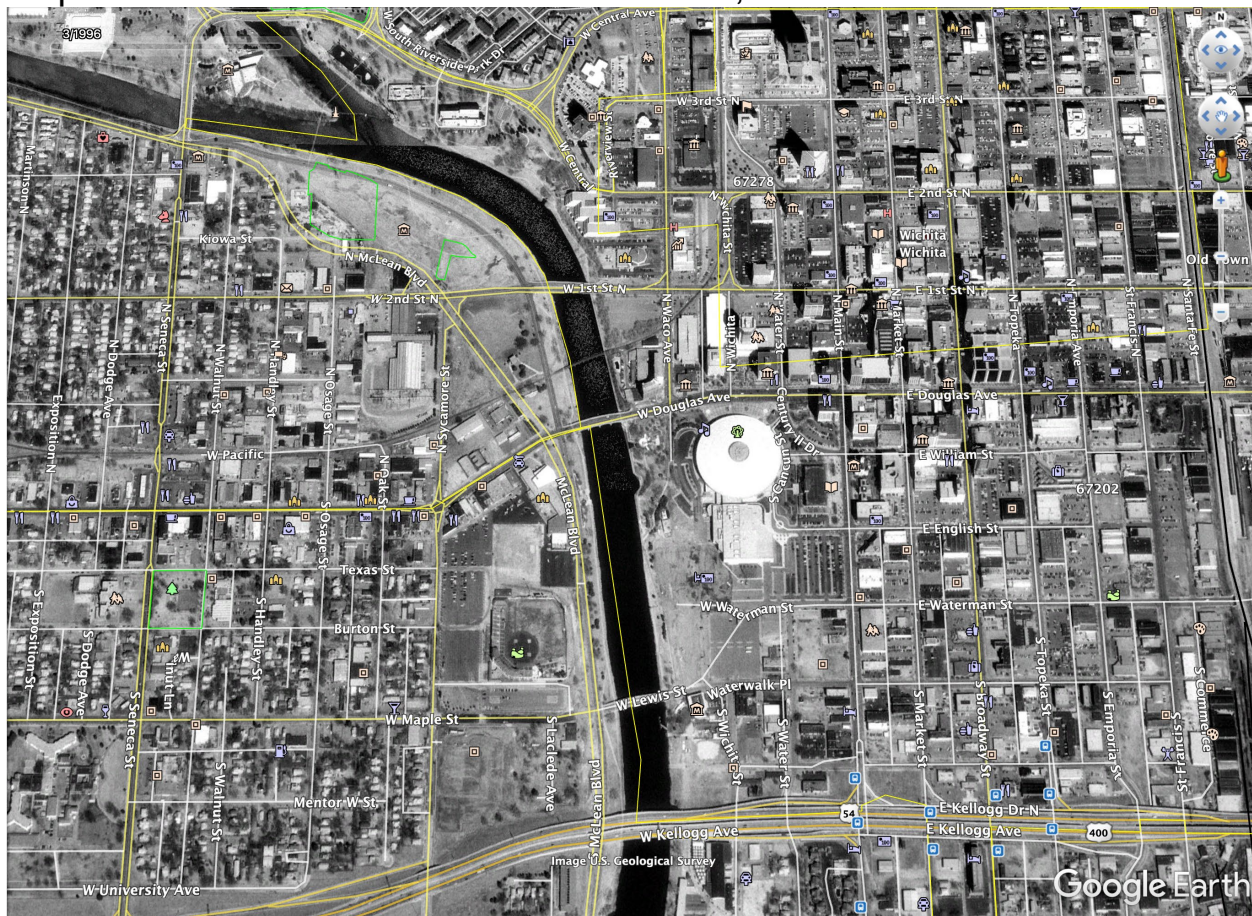
Annual Average (6 years) = \$ 5,537,207.91

Wichita K96/Greenwich ZIP Code: 67226

## Riverwalk East – 67202

The Riverwalk East STAR Bond district includes both developed urban properties and some undeveloped land. The Little Arkansas River flows through the area and has historically limited development along its banks. Map 14 provided an aerial view of the district and the surrounding area.

Map 14: Riverwalk East STAR Bond district, 3/1996



Source: USDA map retrieved from Google Earth

The charts in this section show the average annual number of employees, average wage, and total wages by three digit NAICS code and ZIP code for all businesses within the code category that were doing business in ZIP 67202. Because of the types and density of businesses in the center of Wichita the

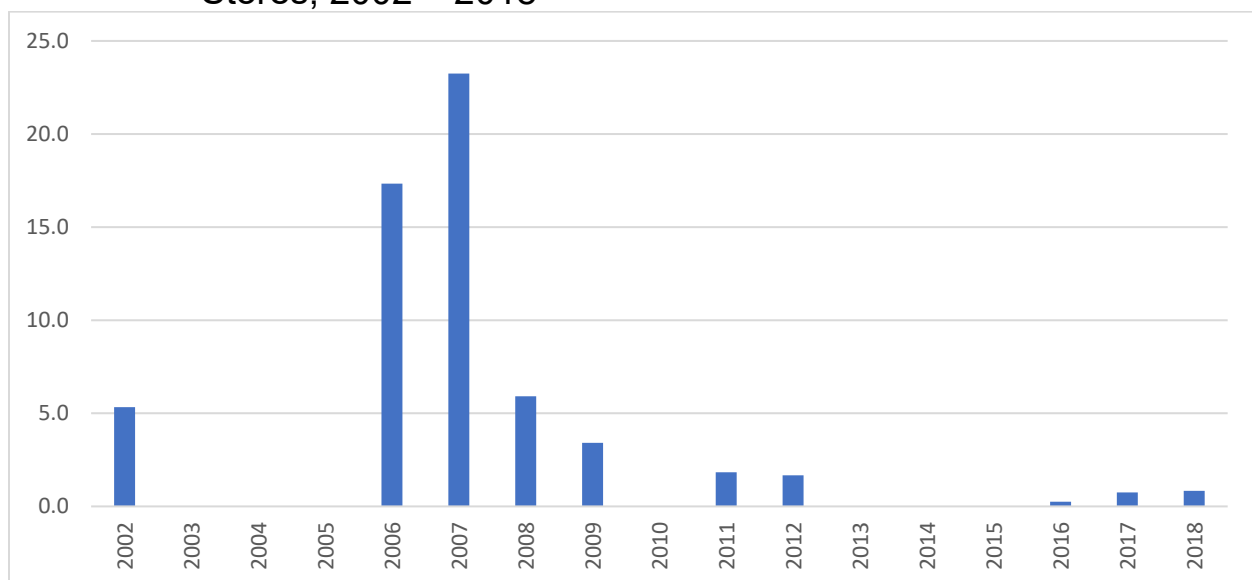


effects of the Riverwalk STAR Bond projects are muted. The underlying data is collected by the Kansas Department of Labor on a monthly basis for each quarter of the year. We use the data on an annual basis.

### Labor Data by NAICS and ZIP

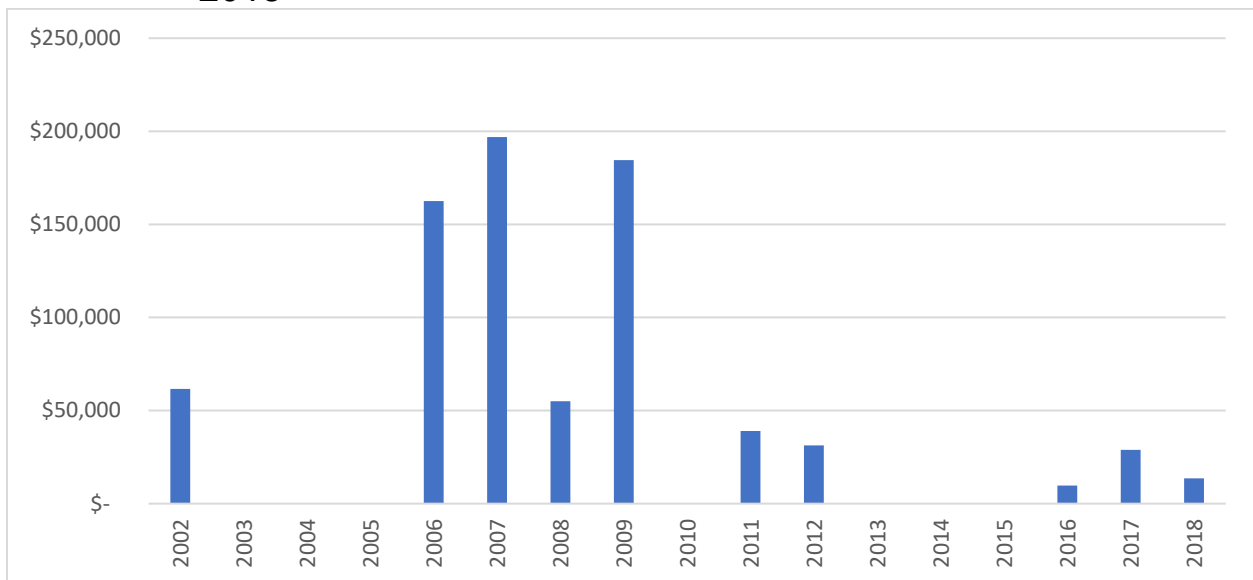
Graphs 182 through 184 provide evidence of the paucity of retail businesses in the center of most cities. The number of employees in food and beverage stores for the entire time period in ZIP code 67202 never reaches 25 people. The total wages and the average wage suggest that these jobs generally poorly paid.

**Graph 182: ZIP 67202, Average Number of Employees, Food & Beverage Stores, 2002 – 2018**



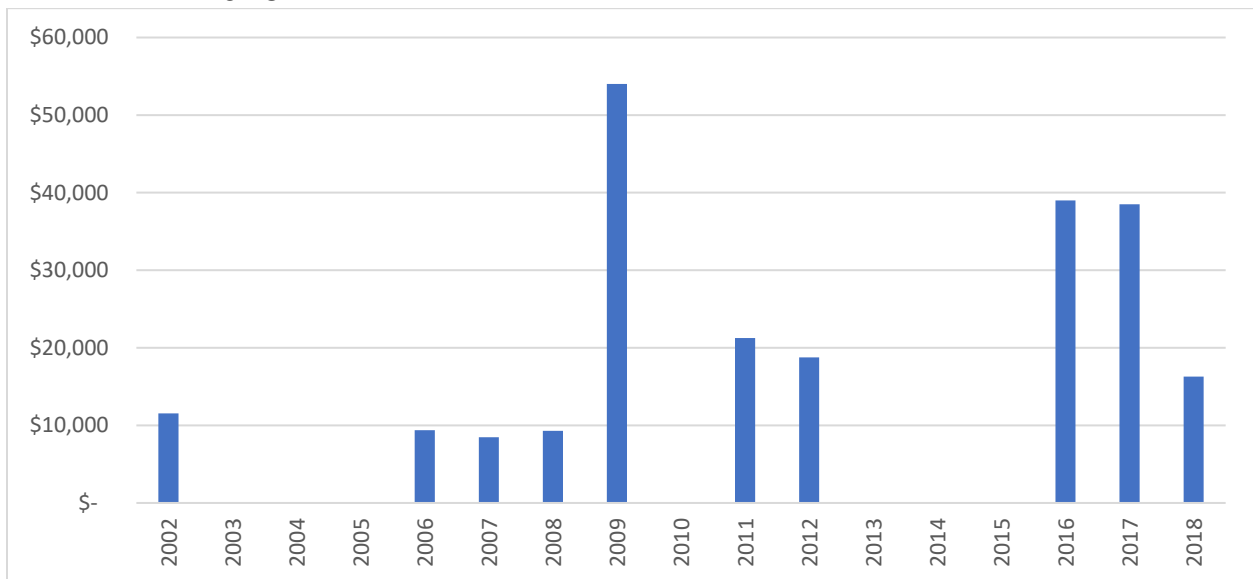
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 183: ZIP 67202, Total Wages, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 184: ZIP 67202, Average Wage, Food & Beverage Stores, 2002 – 2018

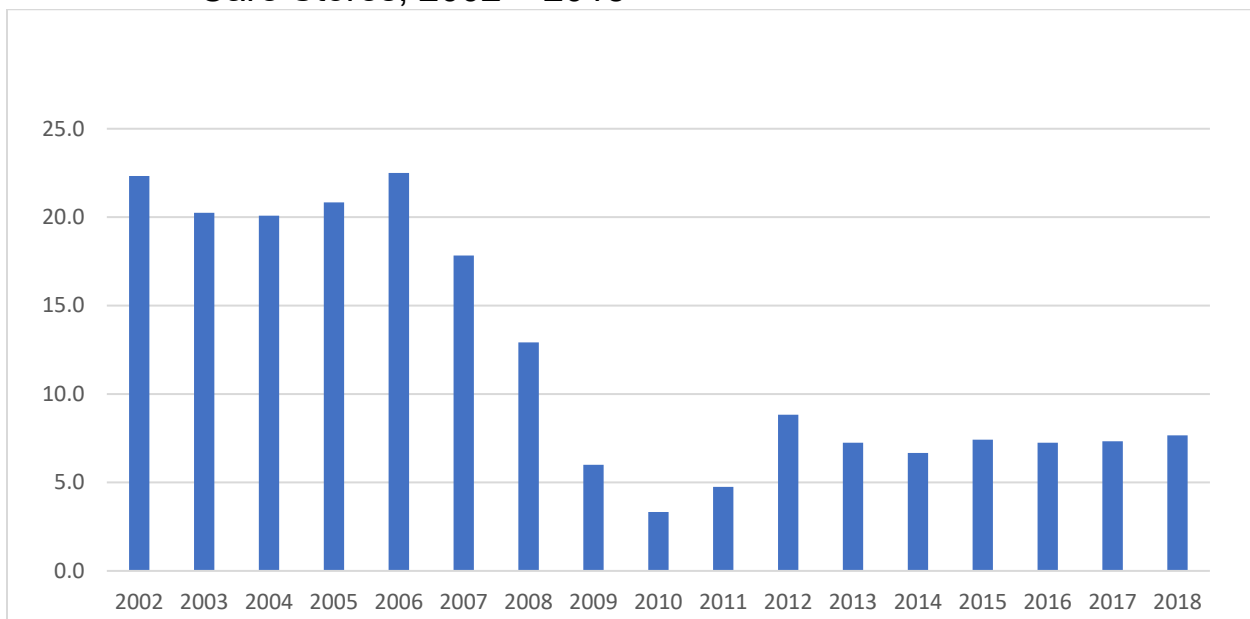


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 185 through 187 reveal a drop in employment in health and personal care stores starting in 2007. Although there are no years with no employees,

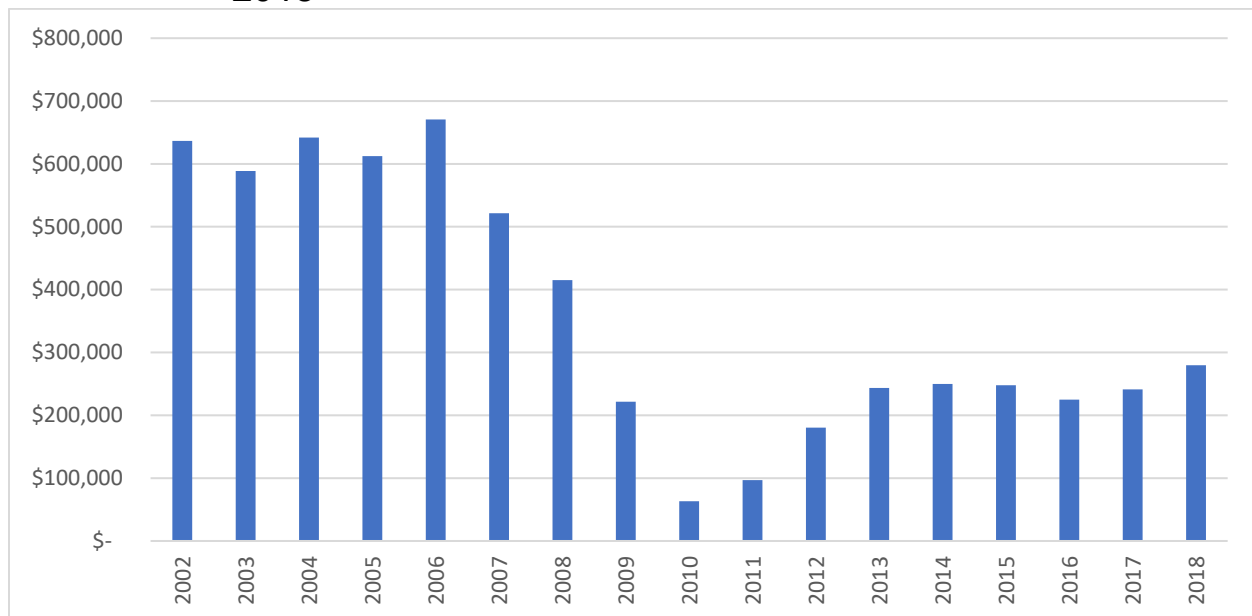
there are also no years when employment reached 25 people. The average wage for health and personal care employees is around \$30,000 per year.

Graph 185: ZIP 67202, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018



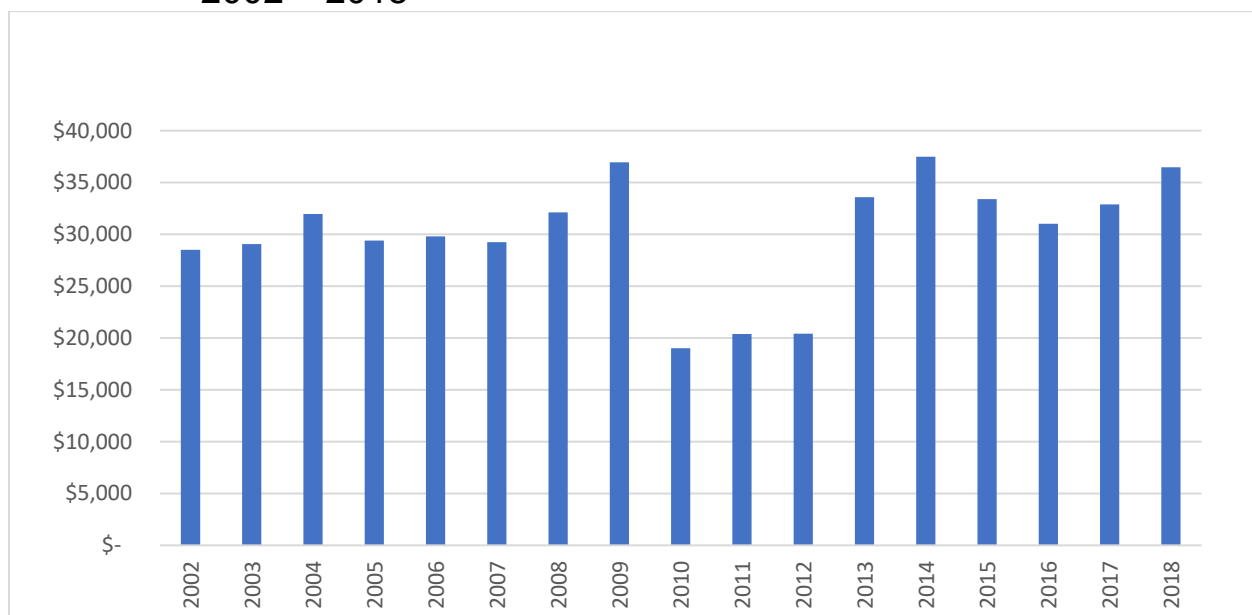
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 186: ZIP 67202, Total Wages, Health & Personal Care Stores, 2002 – 2018**



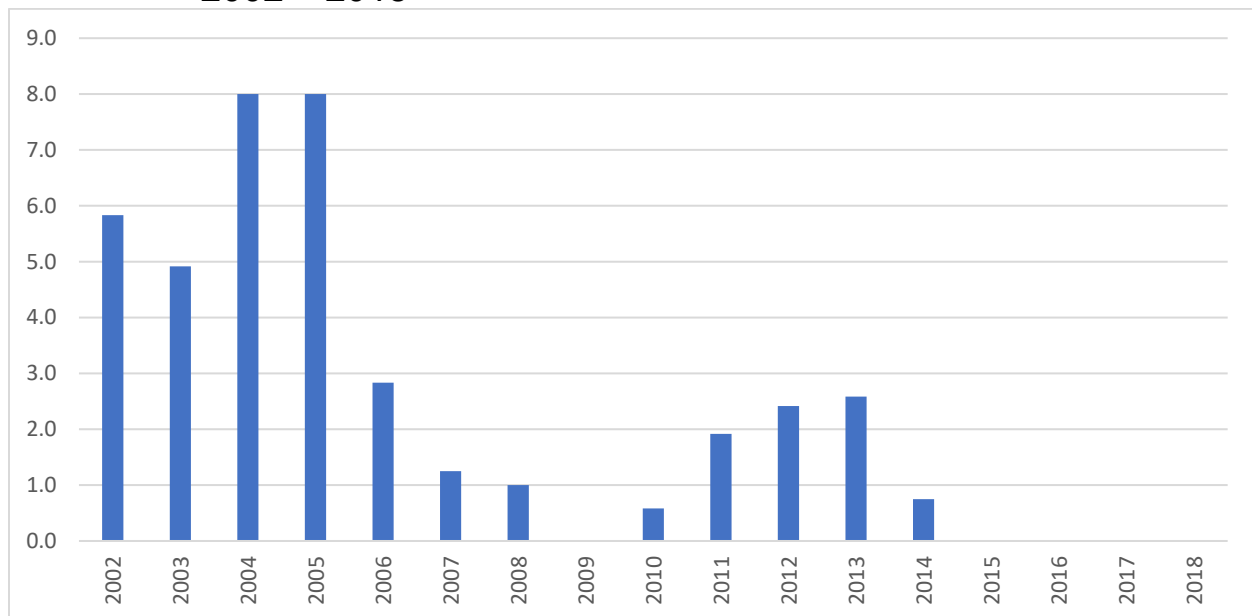
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 187: ZIP 67202, Average Wage, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

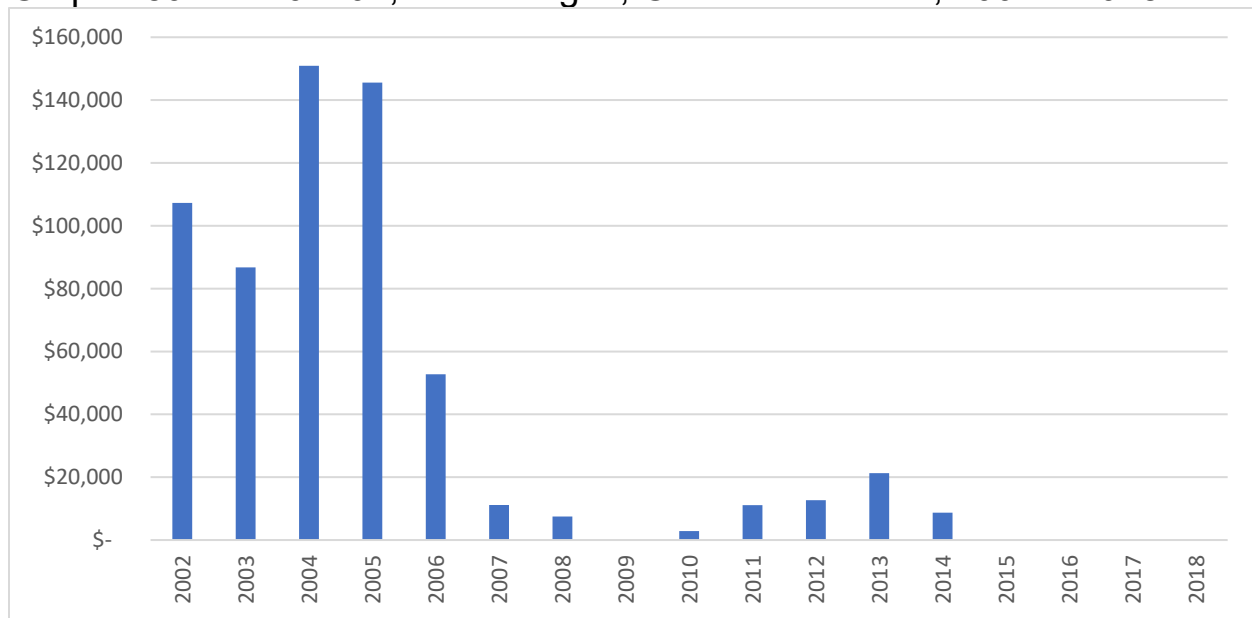
Graph 188: ZIP 67202, Average Number of Employees, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

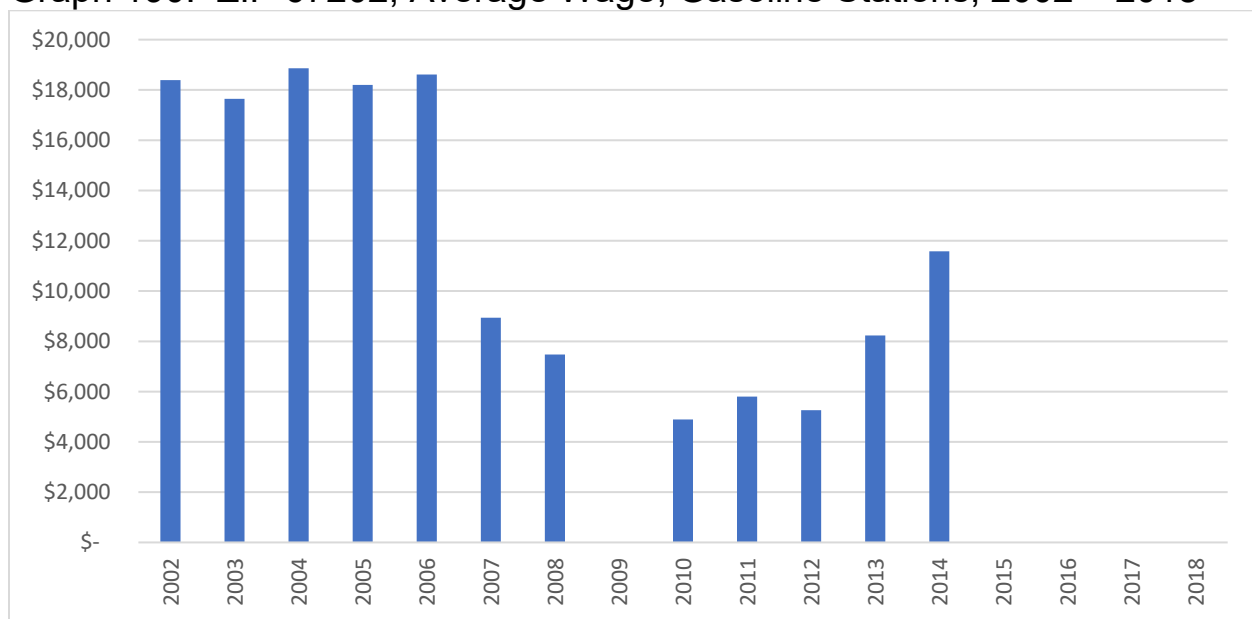
Graphs 188 through 190 show that employment at gasoline stations peaked at 8 people in 2004 and 2005 and diminished to zero in 2015. Clearly, the center of Wichita does not seem as a good location for gasoline stores.

Graph 189: ZIP 67202, Total Wages, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 190: ZIP 67202, Average Wage, Gasoline Stations, 2002 – 2018

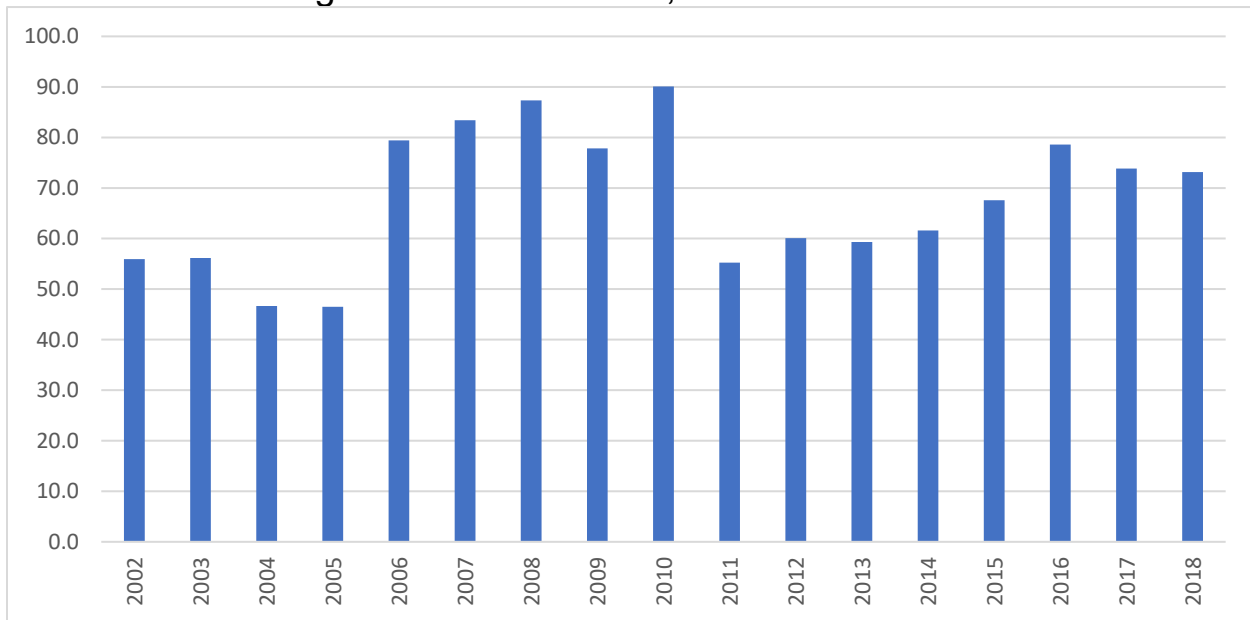


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 191 through 193 show a small increase in the number of employees working at clothing and clothing accessories stores between 2006 and 2010.

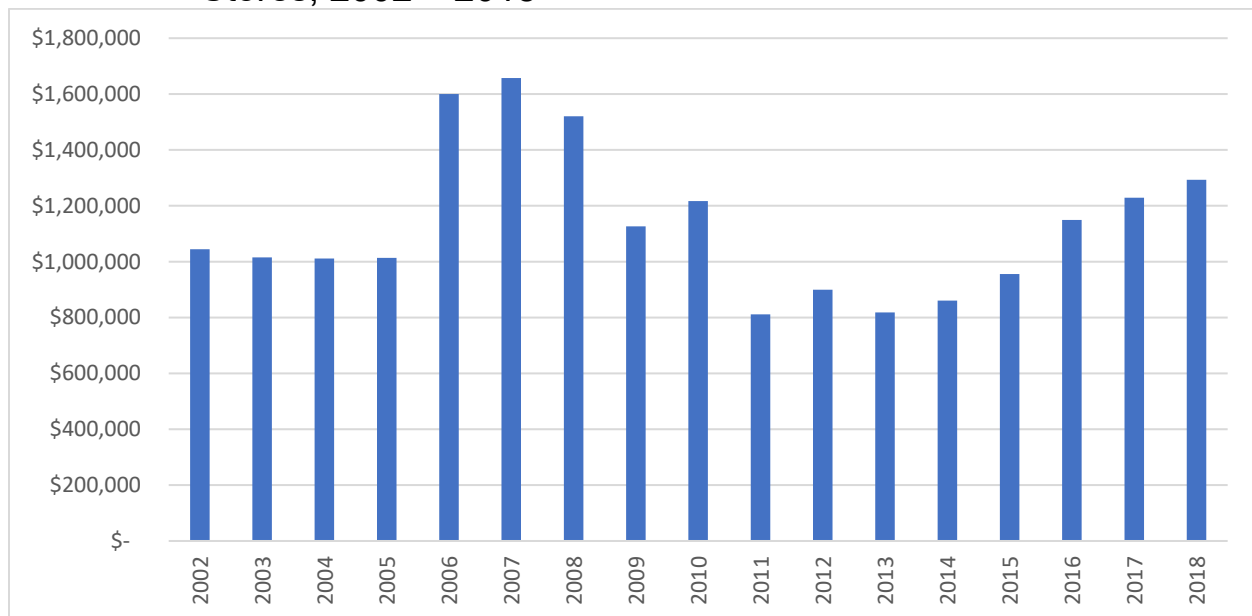
The peak number of employees was 90 employees in 2010. Total wages at clothing and clothing accessories stores in ZIP 67202 were slightly above \$1,600,000 in 2007.

Graph 191: ZIP 67202, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018



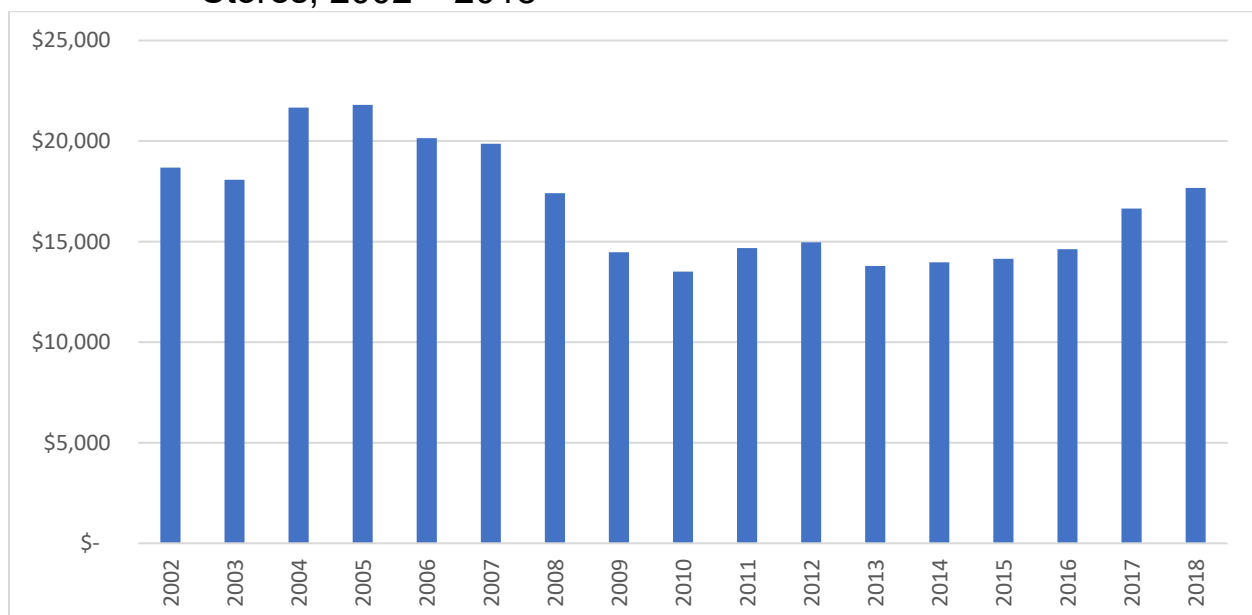
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 192: ZIP 67202, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 193: ZIP 67202, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018**

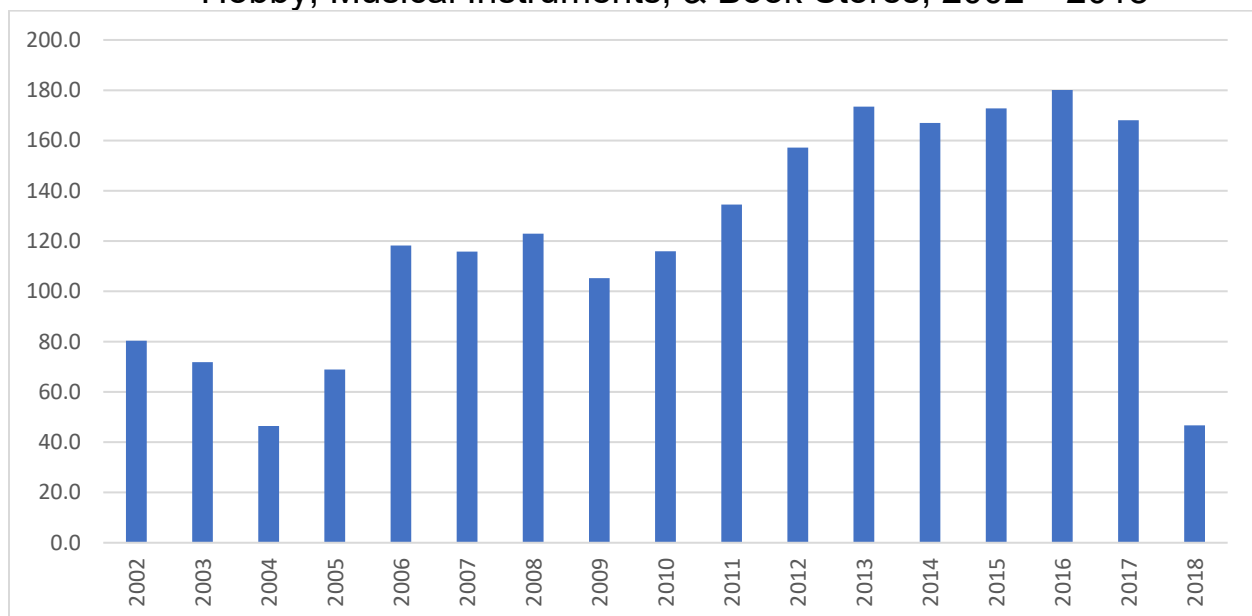


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



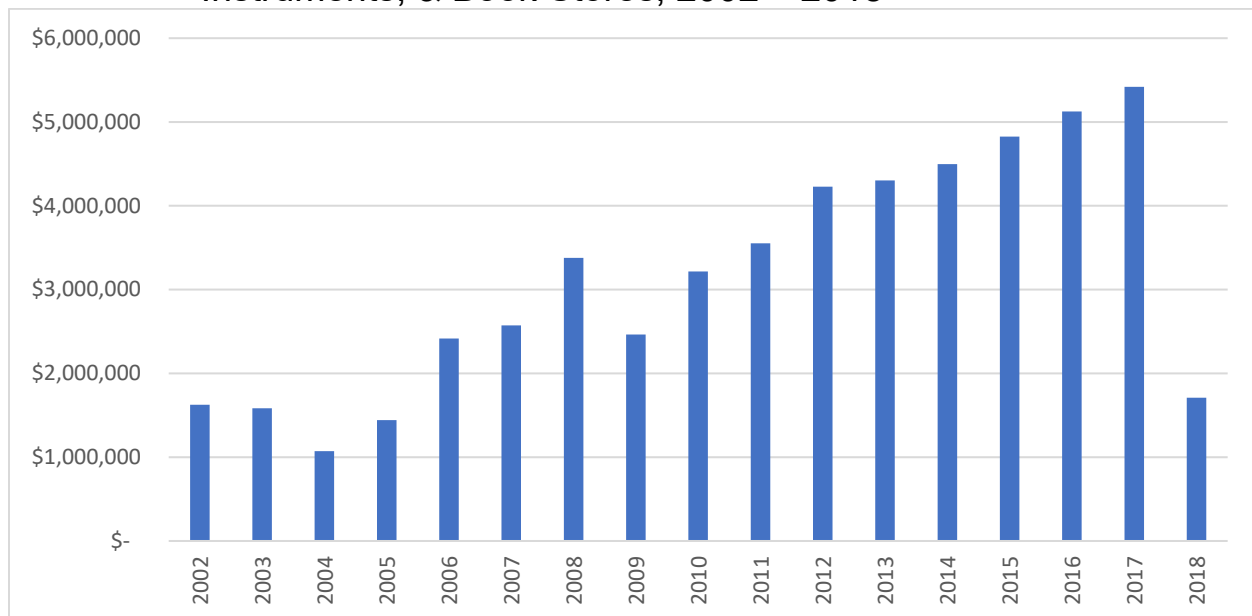
Graphs 194 through 196 show that the number of employees in sporting goods, hobby, musical instrument, and book stores increased fairly steadily in ZIP 67202 from 2004 through 2017. Total wages during this time period increased from \$1,000,000 to more than \$5,000,000. However, the 2018 data shows a major drop in both employment level and total wages.

Graph 194: ZIP 67202, Average Number of Employees, Sporting Goods, Hobby, Musical Instruments, & Book Stores, 2002 – 2018



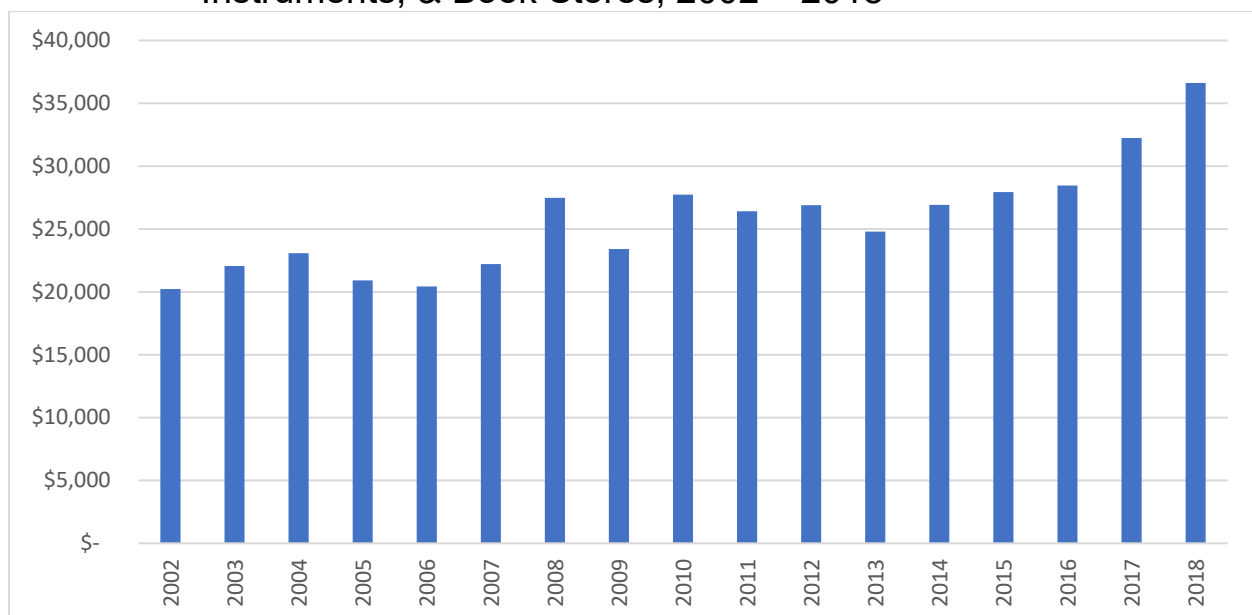
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 195: ZIP 67202, Total Wages, Sporting Goods, Hobby, Musical Instruments, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

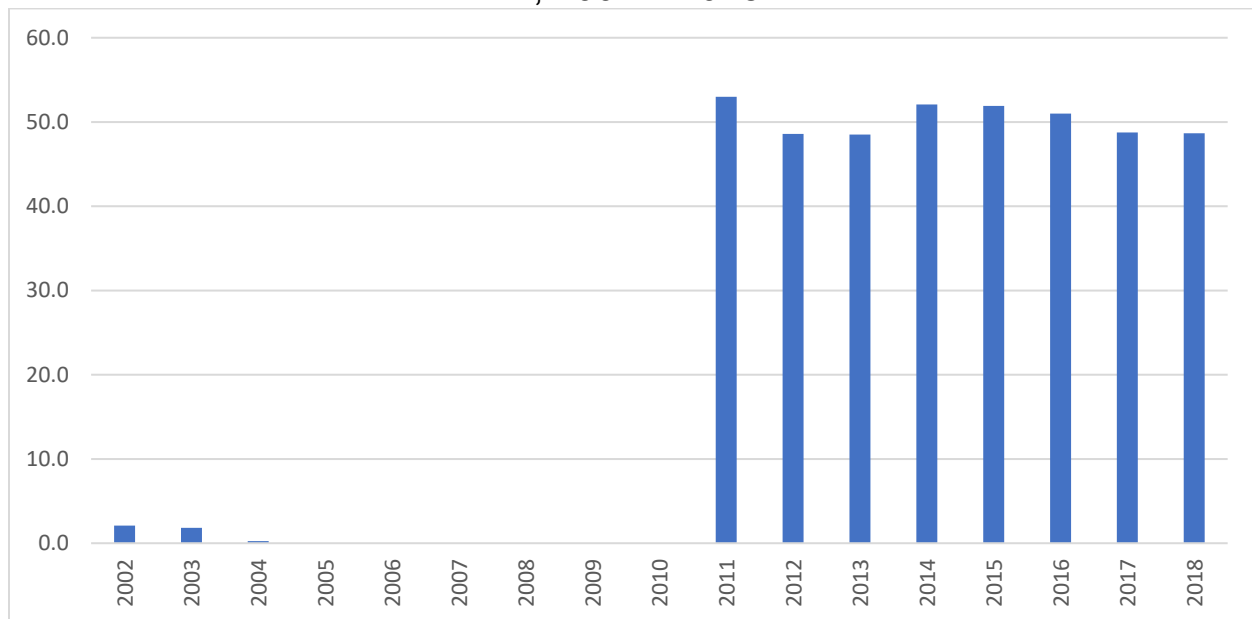
**Graph 196: ZIP 67202, Average Wage, Sporting Goods, Hobby, Musical Instruments, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

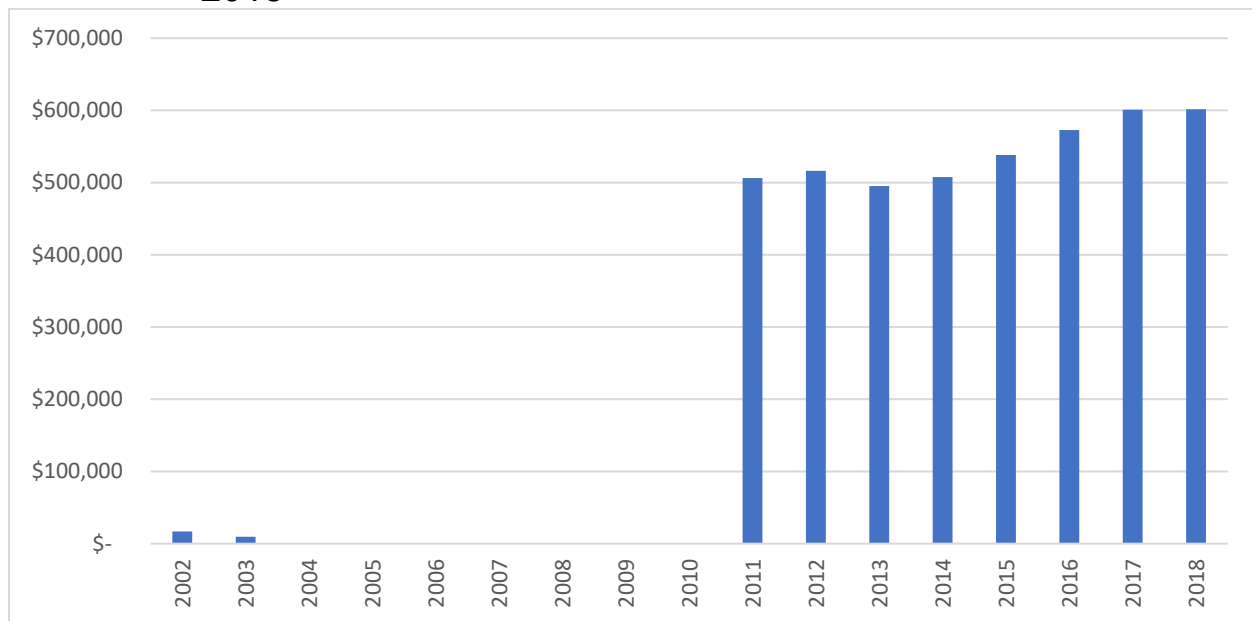
Graphs 197 through 199 reveal new economic activity in ZIP 67202 beginning in 2011. Although there were a couple of employees of general merchandise stores in 2002 and 2003, there were essentially, no employees before 2011. The number of employees at general merchandise stores has fluctuated around 50 people from 2011 through 2018. Graph 198 shows that total wages have climbed from \$500,000 to \$600,000 during that time period.

Graph 197: ZIP 67202, Average Number of Employees, General Merchandise Stores, 2002 – 2018



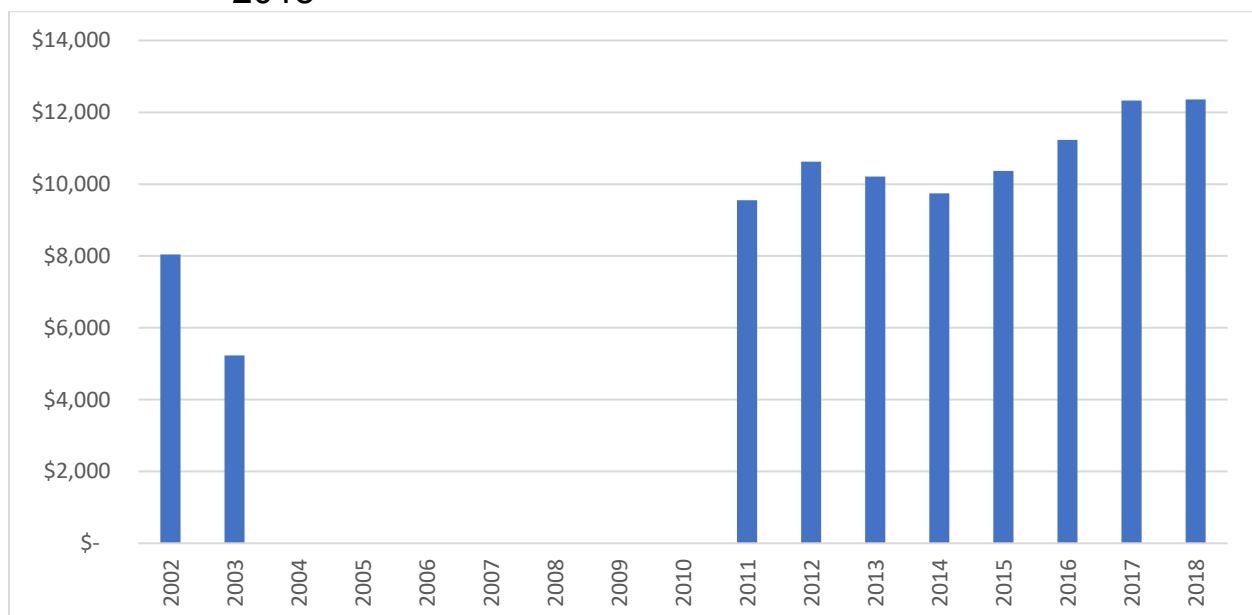
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 198: ZIP 67202, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

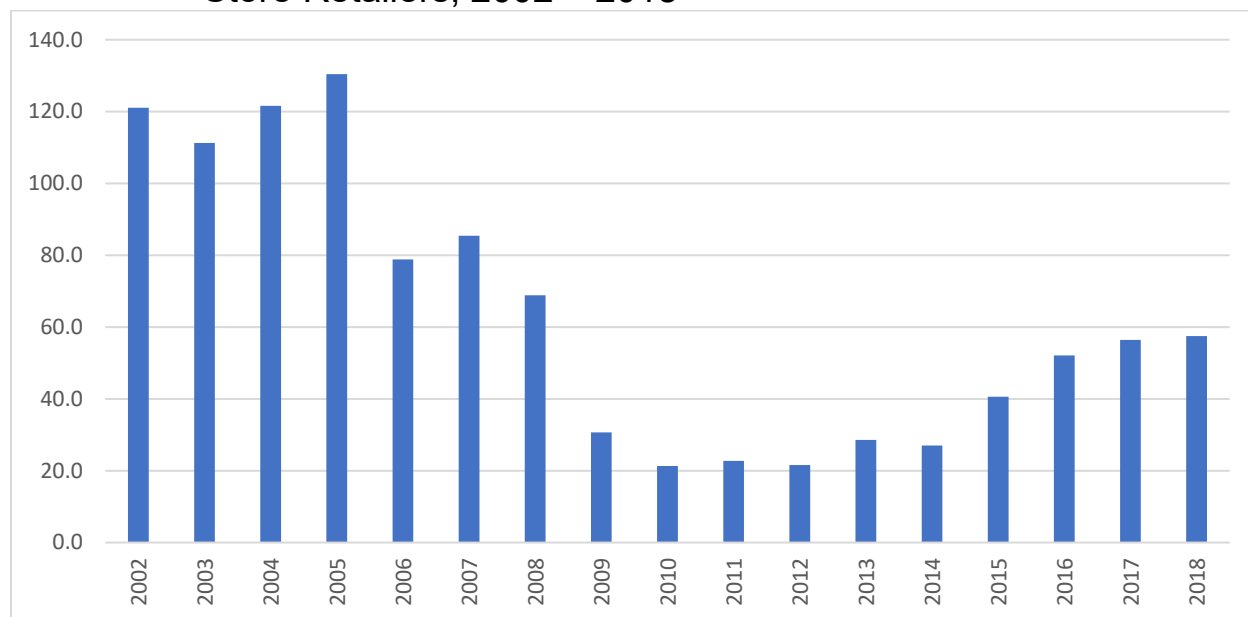
**Graph 199: ZIP 67202, Average Wage, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

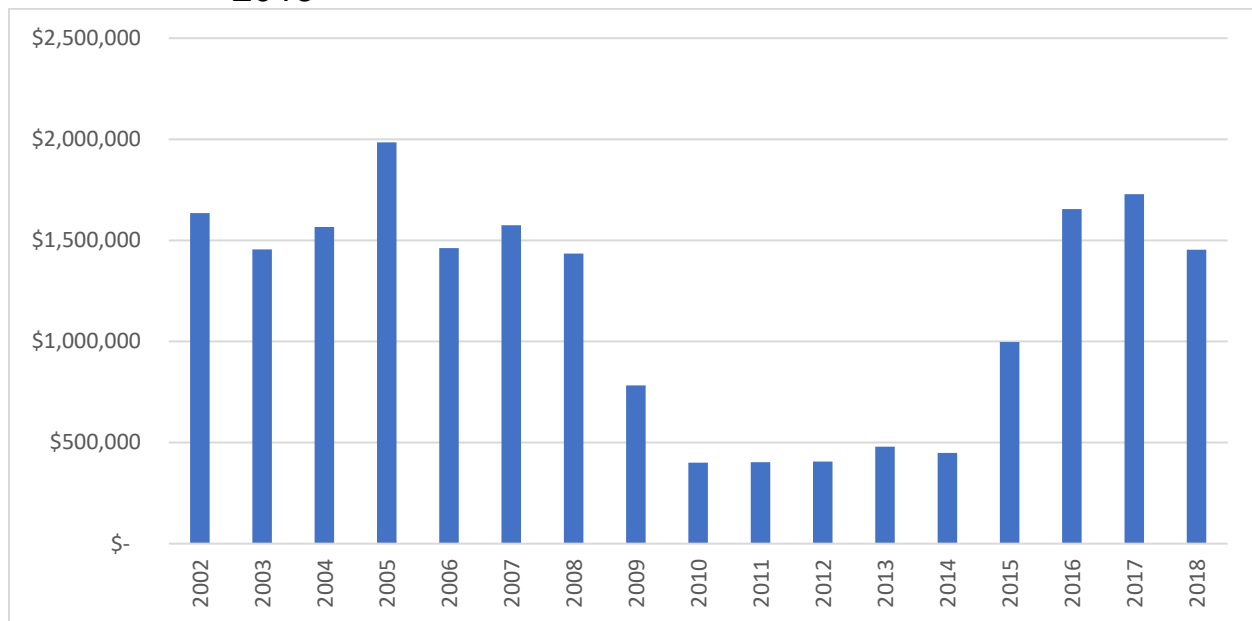
Graphs 200 through 202 reveal that the number of employees in the catchall category, miscellaneous store retailers declined from an initial level of about 120 people to a low of around 20 people between 2010 and 2012 and then grew again to almost 60 people. Even though this number of employees is only half the earlier number, total wages have returned to the previous level of approximately \$1,500,000.

Graph 200: ZIP 67202, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018



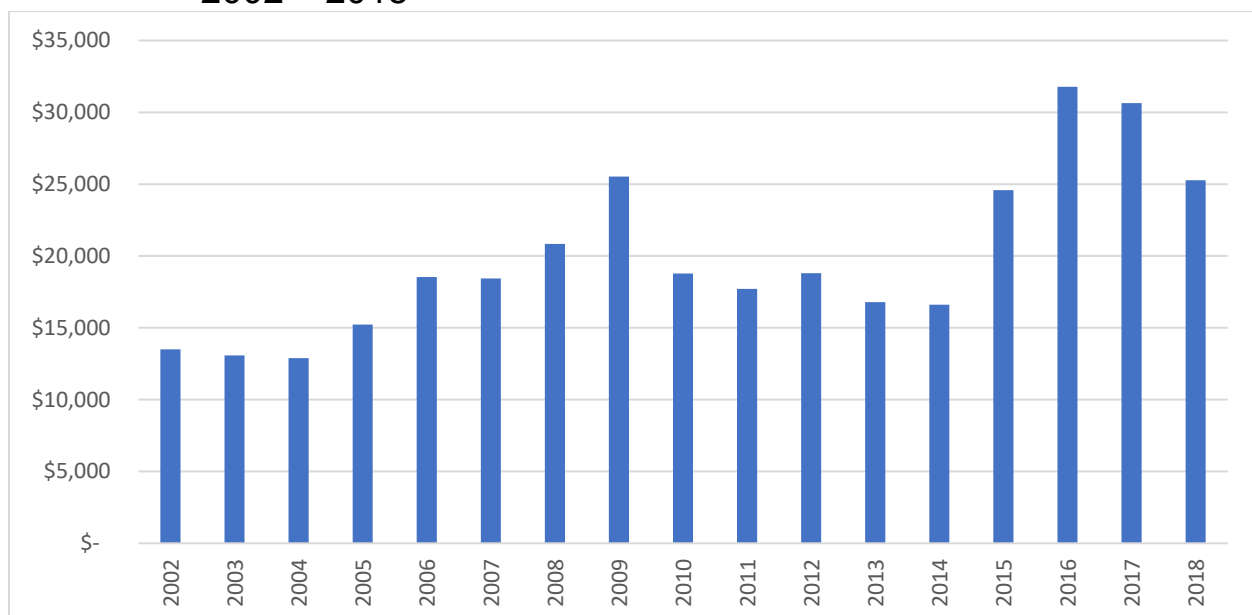
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 201: ZIP 67202, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

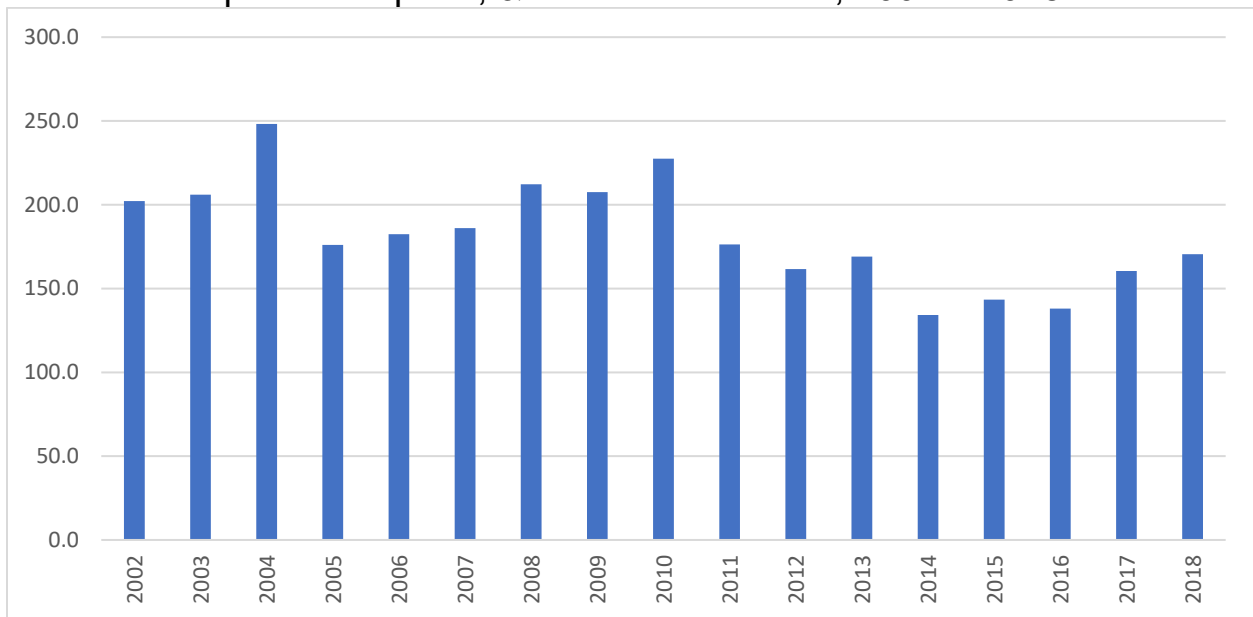
**Graph 202: ZIP 67202, Average Wage, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

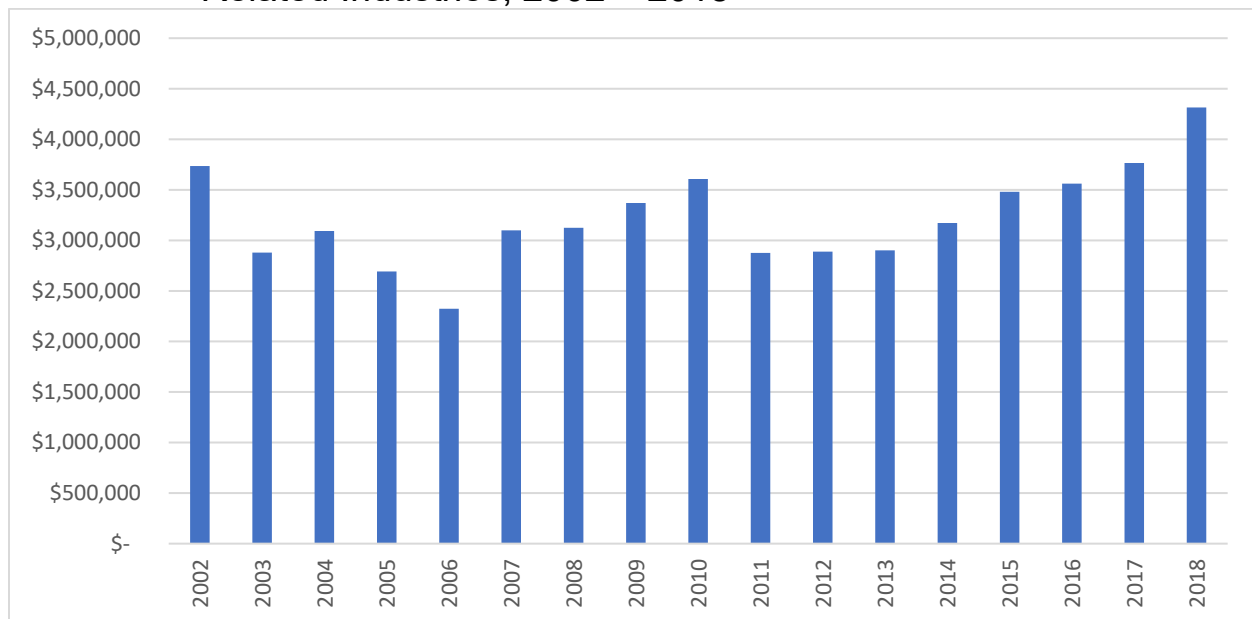
Graphs 203 through 205 show that in ZIP 67202 the number of employees in the performing arts, spectator sports, and related industries has fluctuated from 200 in 2002 to 170 in 2018. Total wages in 2018 were over \$4,000,000 and the average wage was approximately \$25,000.

Graph 203: ZIP 67202, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018



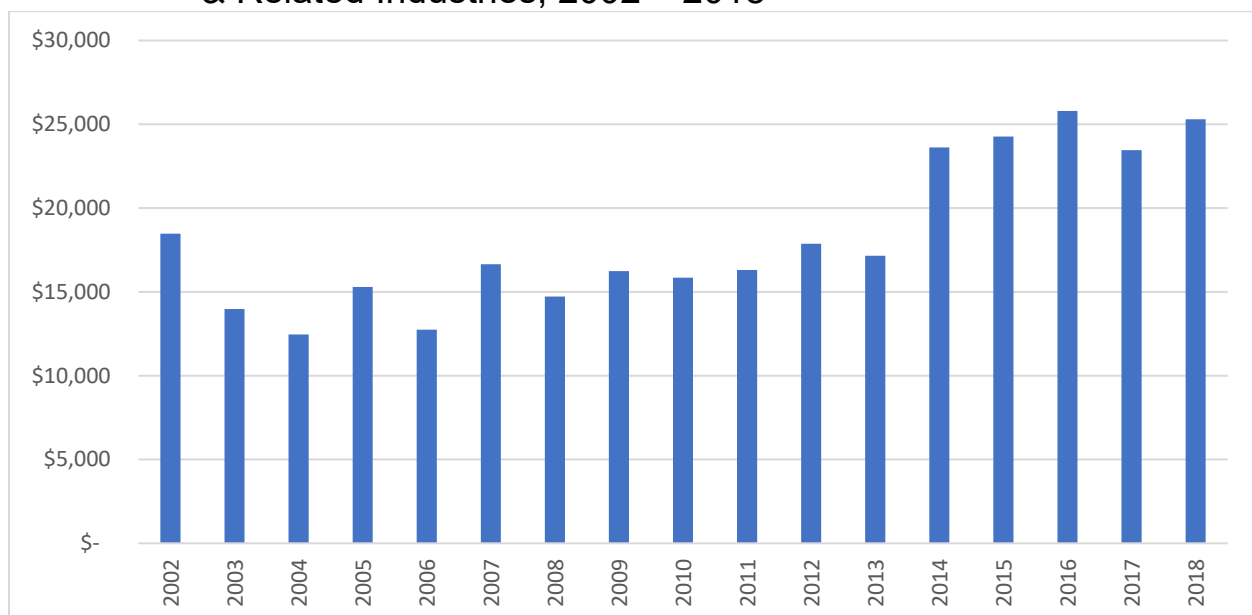
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 204: ZIP 67202, Total Wages, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 205: ZIP 67202, Average Wage, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**

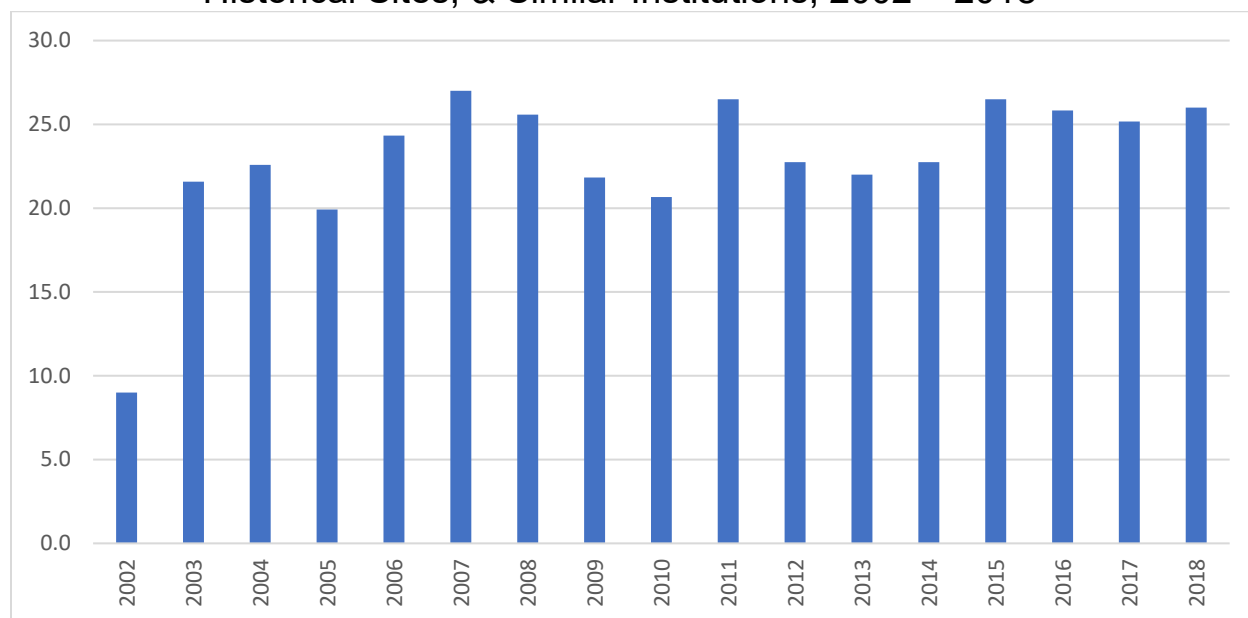


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



Graph 206 shows that the average number of employees at museums, historical sites, and similar institutions in ZIP 67202 has remained relatively constant at about 25 employees.

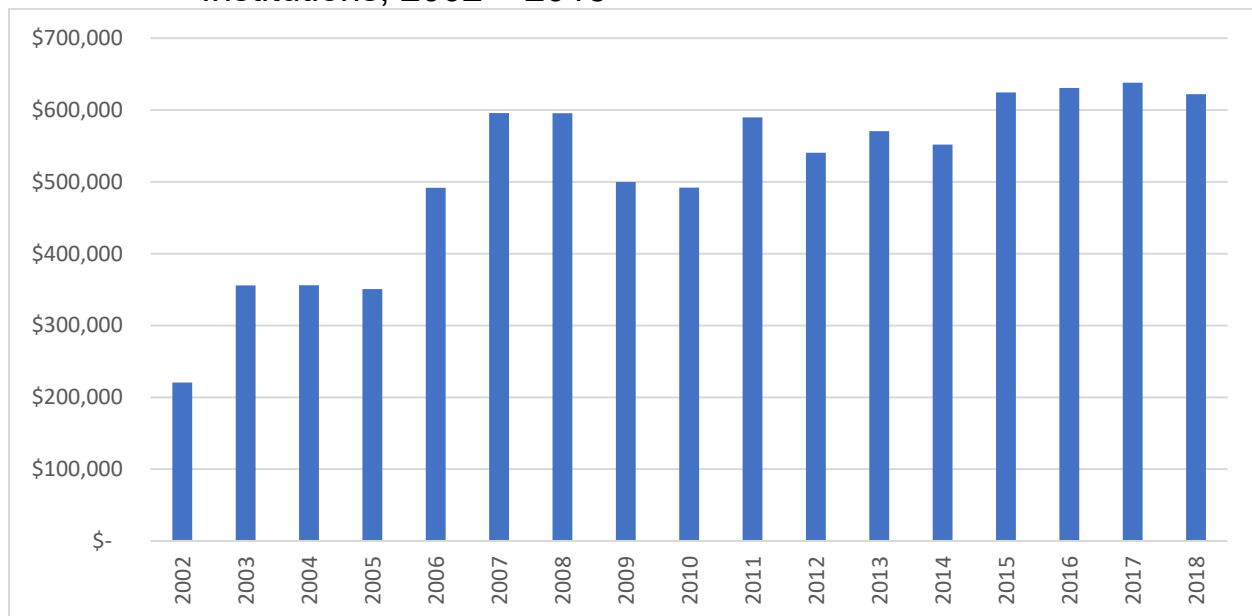
Graph 206: ZIP 67202, Average Number of Employees, Museums, Historical Sites, & Similar Institutions, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

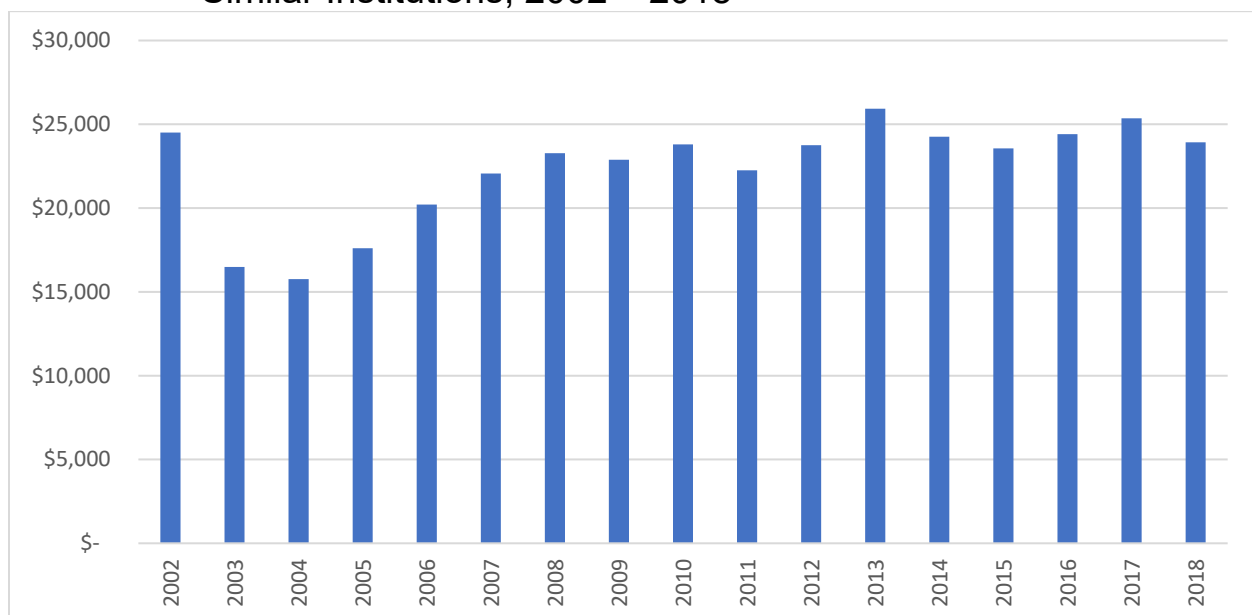
Graph 207 shows that total wages at museums, historical sites, and similar institutions has remained relatively constant at about \$600,000 for the last twelve years. Graph 208 shows that the average wage for 2018 was approximately \$24,000.

**Graph 207: ZIP 67202, Total Wages, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

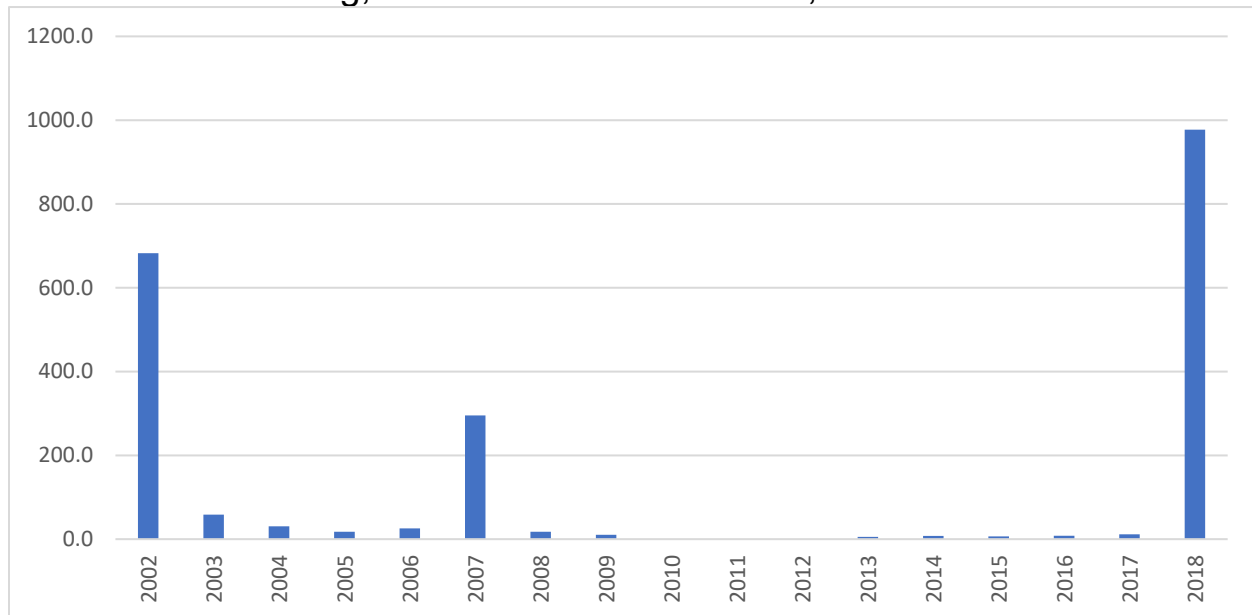
**Graph 208: ZIP 67202, Average Wage, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

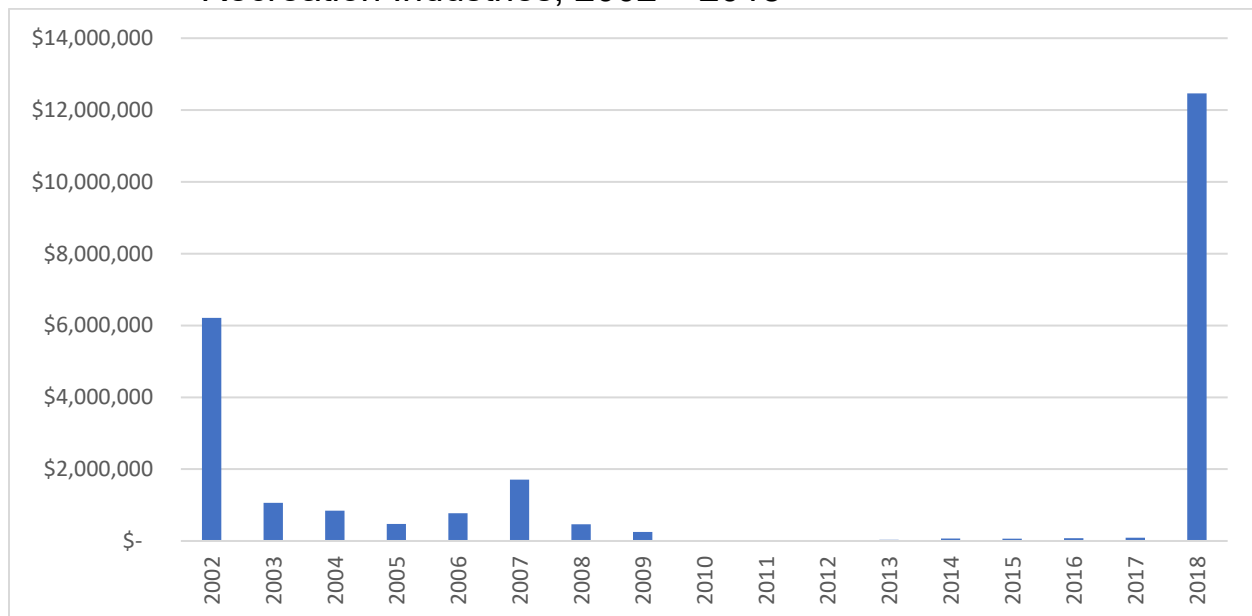
Graphs 209 through 211 present an unusual economic sector in ZIP 67202. The number of employees fluctuates between zero and nearly 1000 from 2002 through 2018. Graph 211 shows that there are three years, 2010 – 2012, with zero average wage because there are zero employees.

**Graph 209: ZIP 67202, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



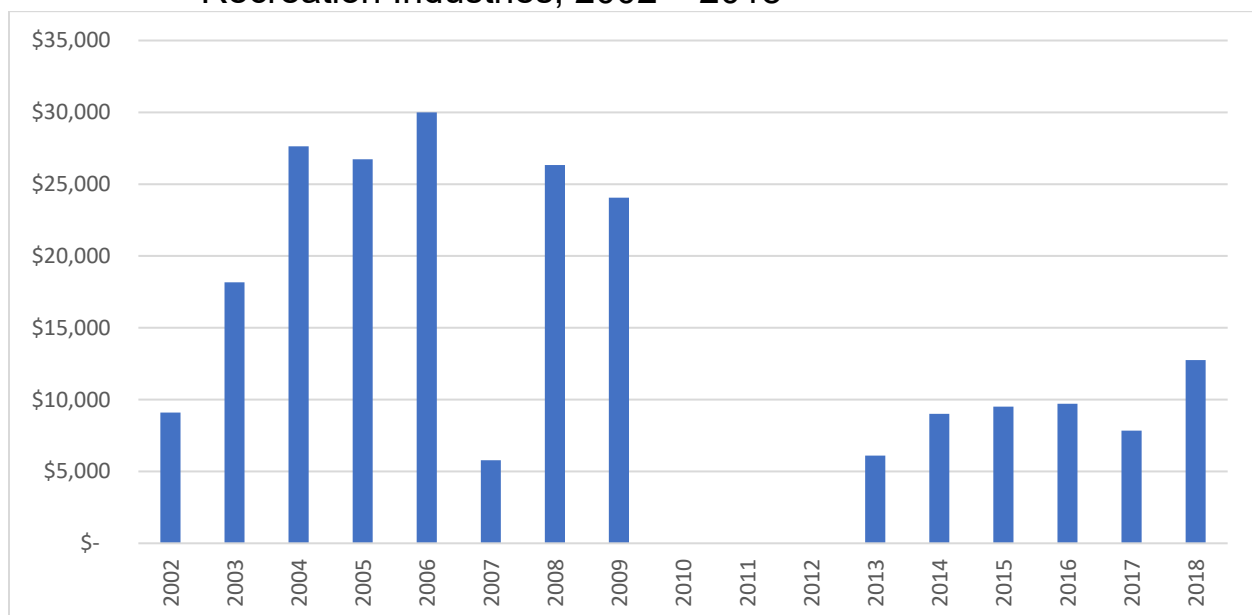
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 210: ZIP 67202, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

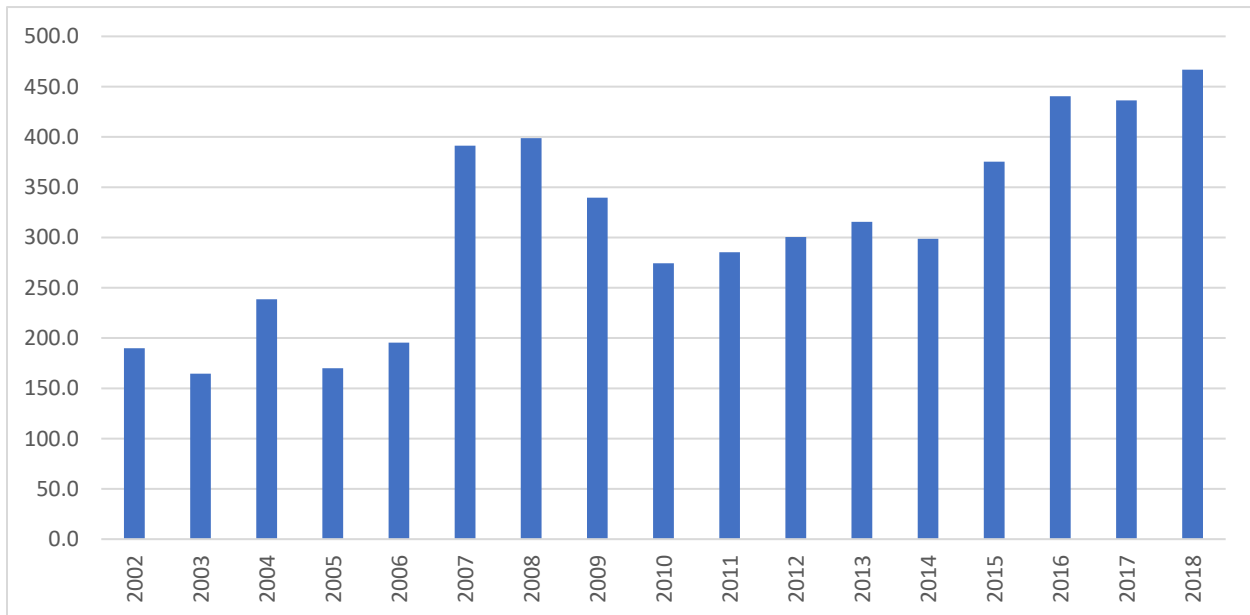
**Graph 211: ZIP 67202, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

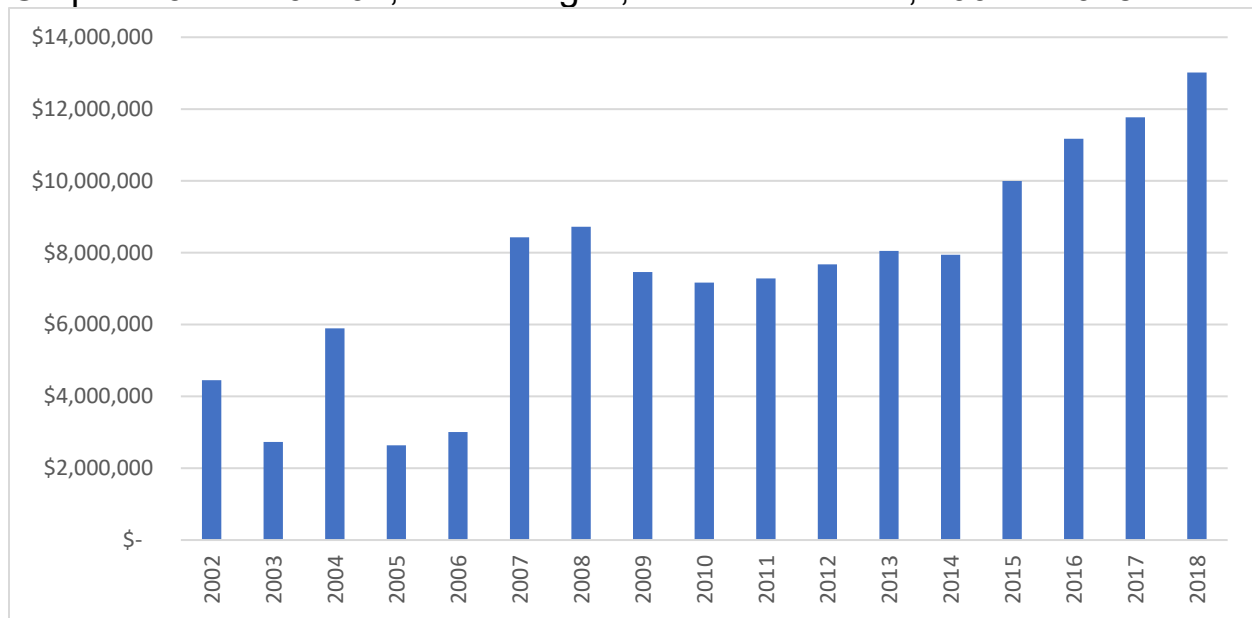
Graphs 212 through 214 show that in ZIP 67202 the number of employees working in the accommodation sector rose from under 200 in 2002 to more than 450 in 2018. During that same time interval total wages rose from \$4,500,000 to over \$13,000,000. And, the average wage since 2010 has been over \$25,000.

Graph 212: ZIP 67202, Average Number of Employees, Accommodation, 2002 – 2018



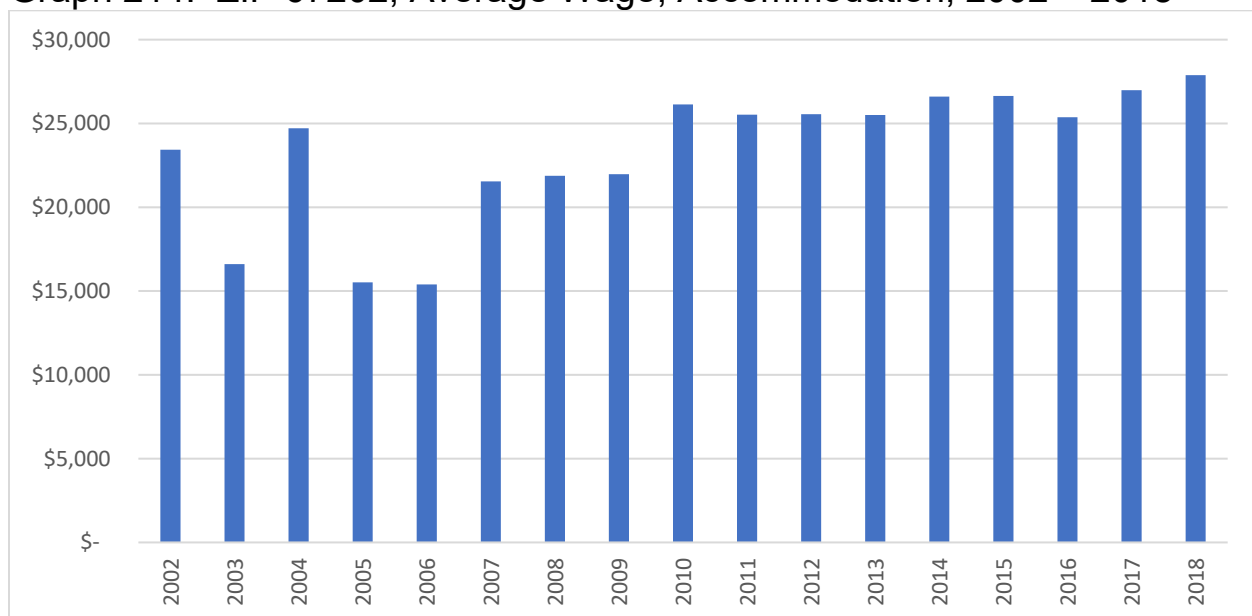
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 213: ZIP 67202, Total Wages, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 214: ZIP 67202, Average Wage, Accommodation, 2002 – 2018**

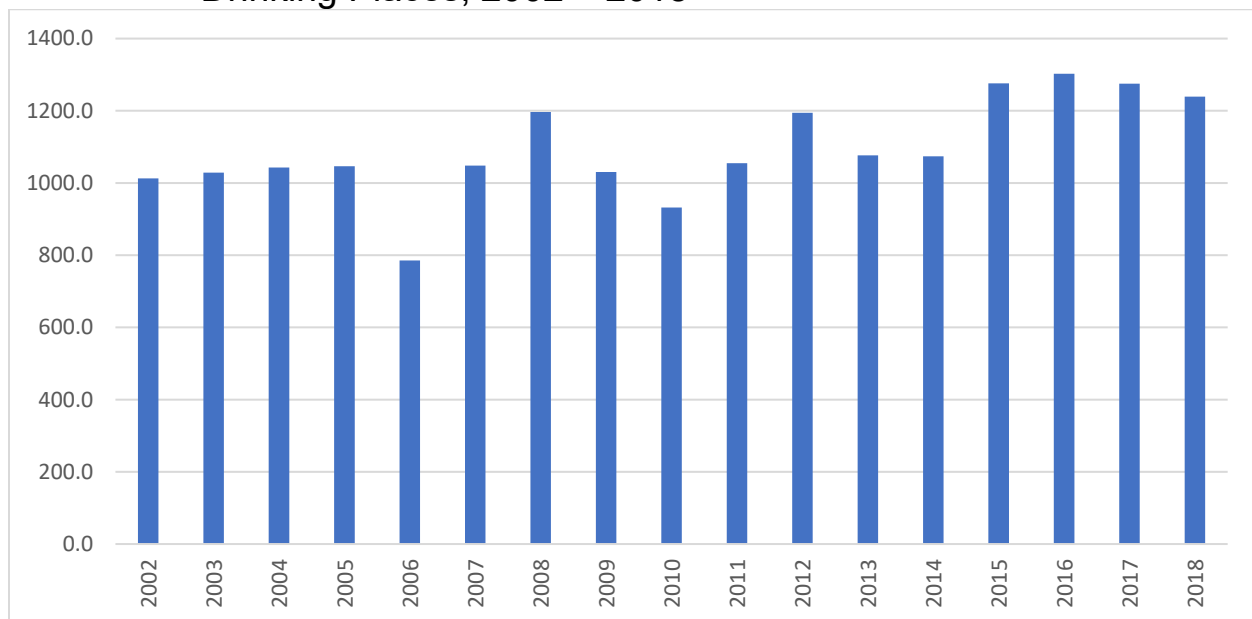


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 215 through 217 show that in ZIP 67202 the number of employees has remained relatively constant from 2002 through 2018. Total wages and the

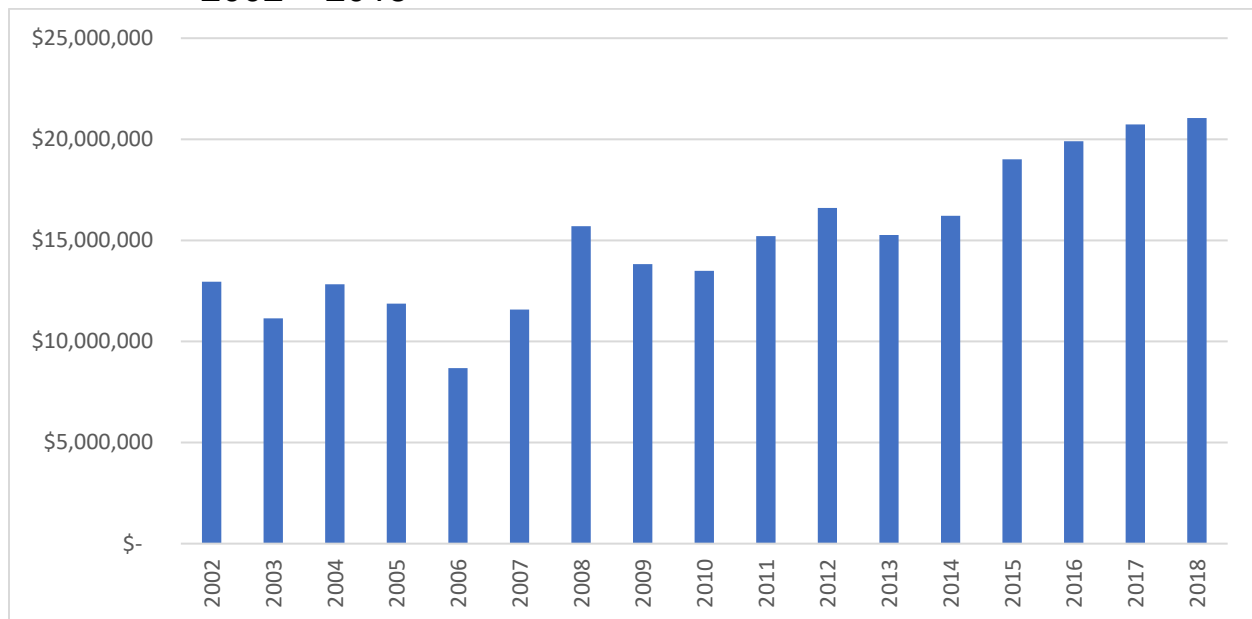
average wage have increased during the same period. Thus, it appears that the food services and drinking places sector has been fairly stable during this time period.

**Graph 215: ZIP 67202, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



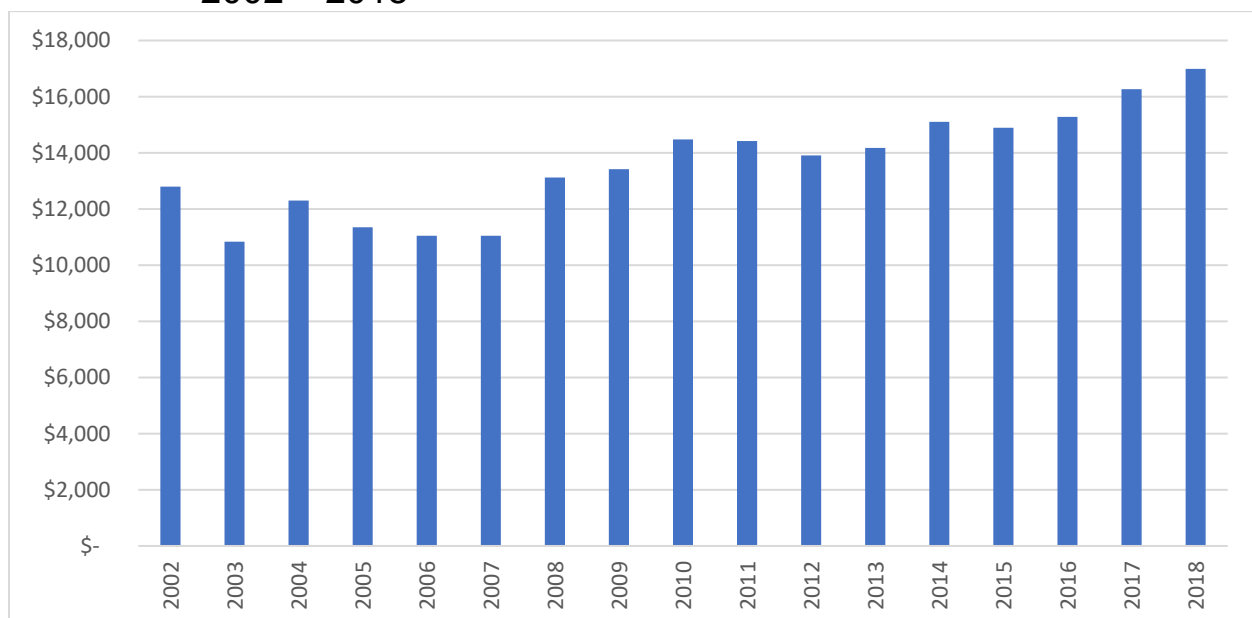
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 216: ZIP 67202, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 217: ZIP 67202, Average Wage, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



The two large and stable sectors, as measured by this labor data, in ZIP 67202 are accommodation (NAICS 721) and food services and drinking places (NAICS 722).

### Riverwalk West – 67203

The Riverwalk West STAR Bond district includes both developed urban properties and some undeveloped land. It also includes an established neighborhood area known as Delano. The Little Arkansas River flows through the area and has historically limited development along its banks. The area to the west of the Riverwalk West STAR Bond district is mostly established residential. Map 15 provided an aerial view of the district and the surrounding area.

Map 15: Riverwalk West STAR Bond district

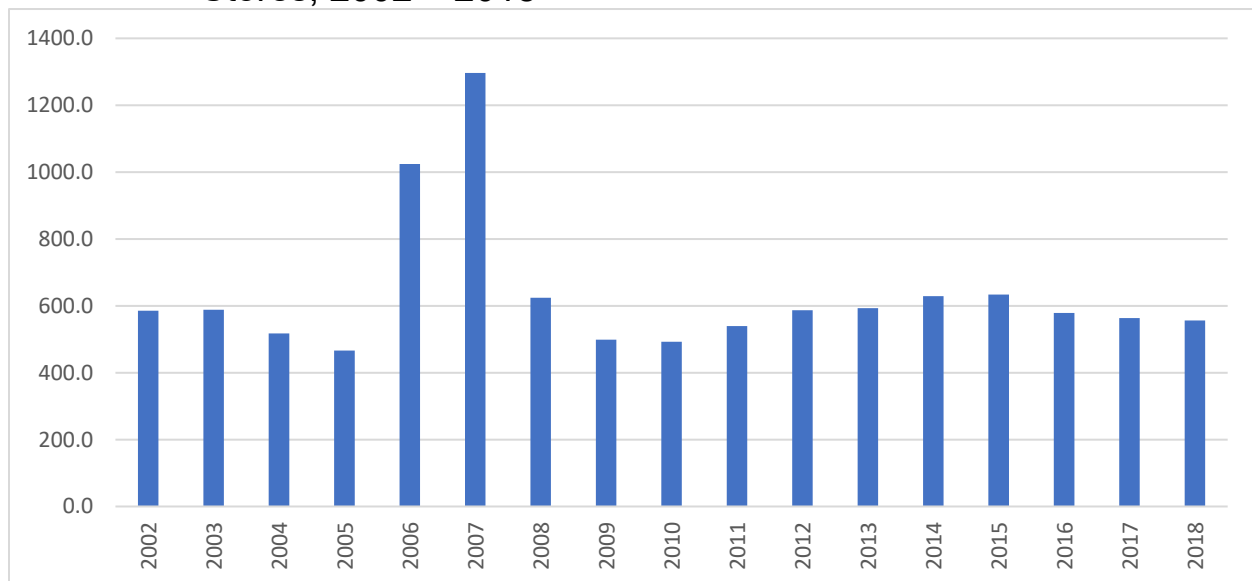


Source: Maxar Technologies, U.S. Geological Survey, USDA Farm Service Agency. Retrieved from Google Maps.

## Labor Data by NAICS and ZIP

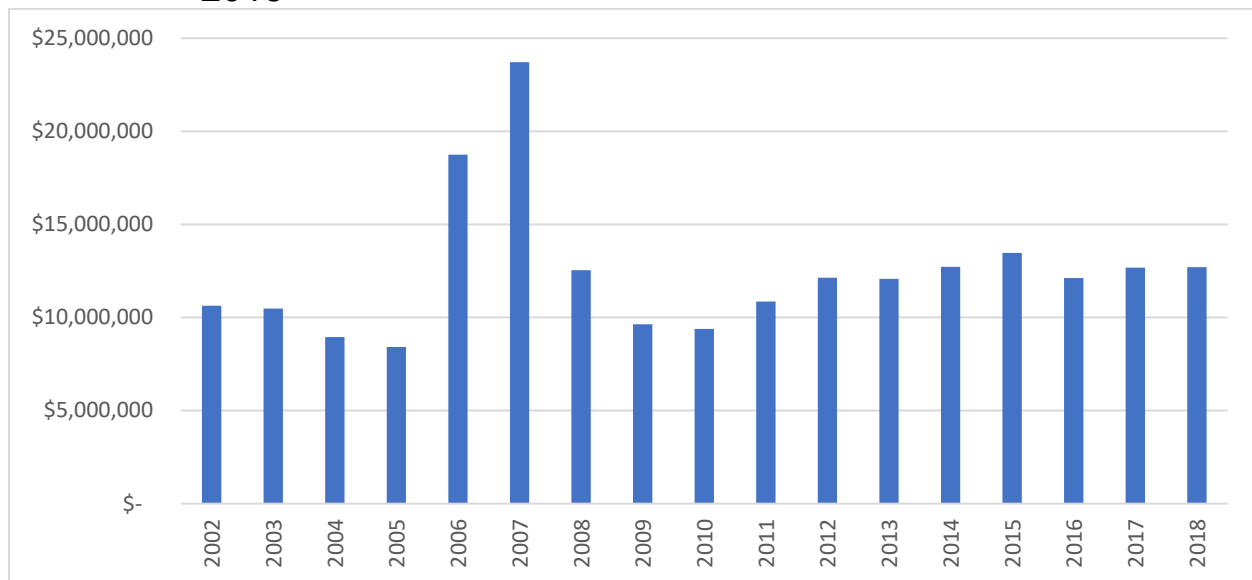
Graphs 218 through 220 show that the number of employees at food and beverage stores in ZIP 67203 were relatively stable in the range of 450 to 600 people. There were two years, 2006 and 2007, when the number of employees spiked to nearly 1300 people. Whatever was the cause of the spike, it was short-lived. Total wages in 2018 were over \$12,500,000.

Graph 218: ZIP 67203, Average Number of Employees, Food & Beverage Stores, 2002 – 2018



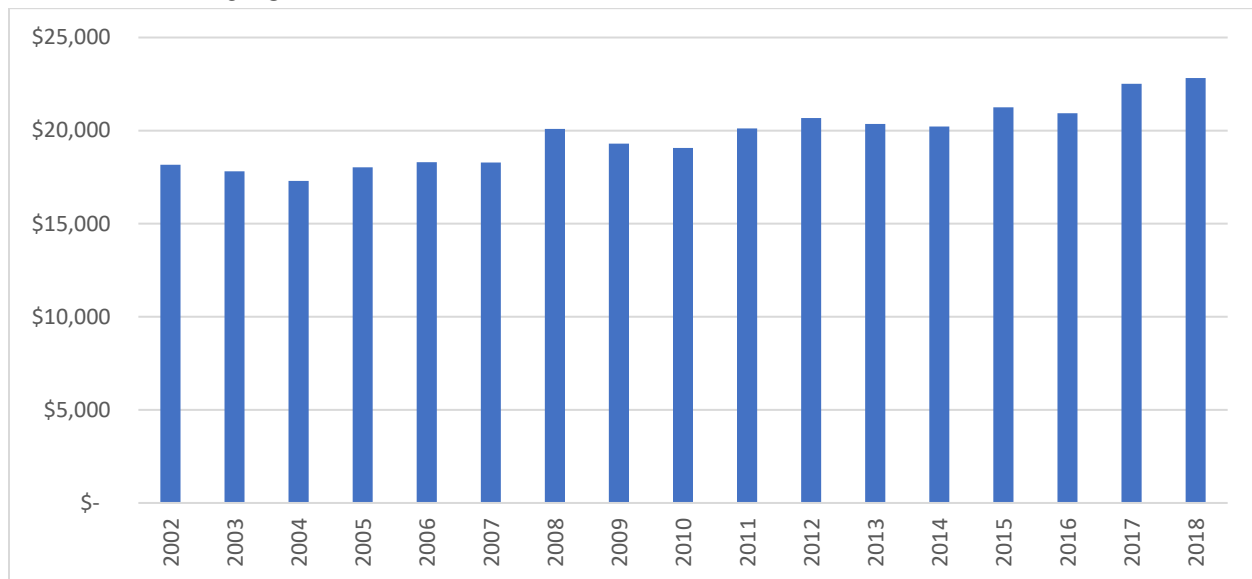
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 219: ZIP 67203, Total Wages, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

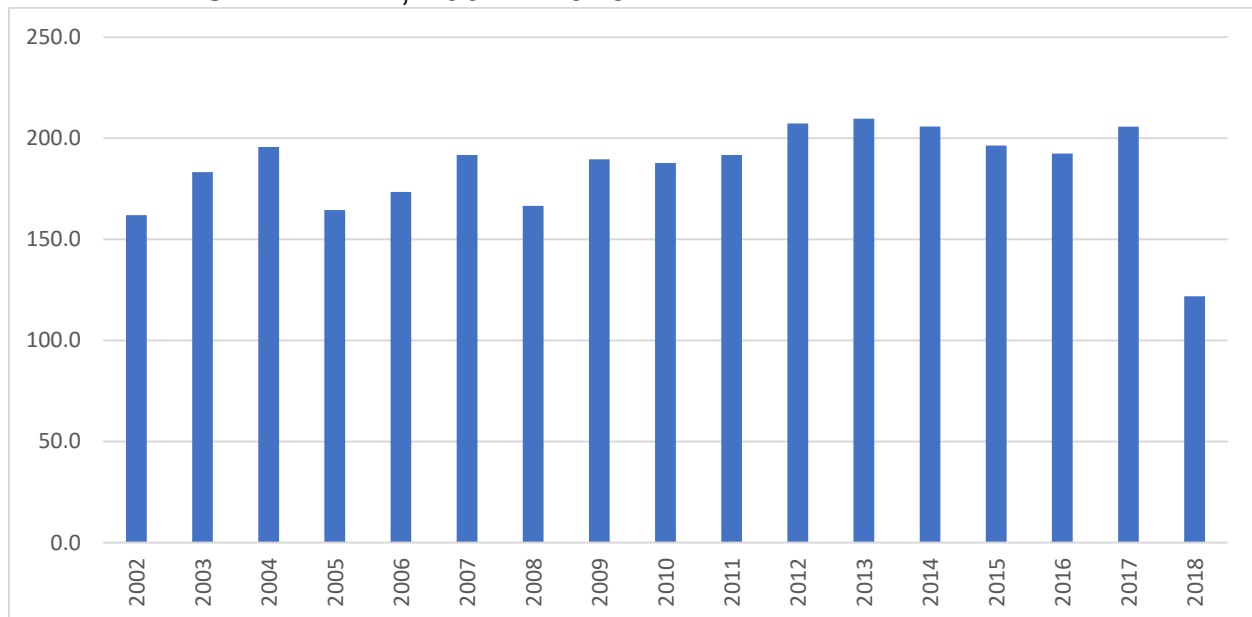
Graph 220: ZIP 67203, Average Wage, Food & Beverage Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

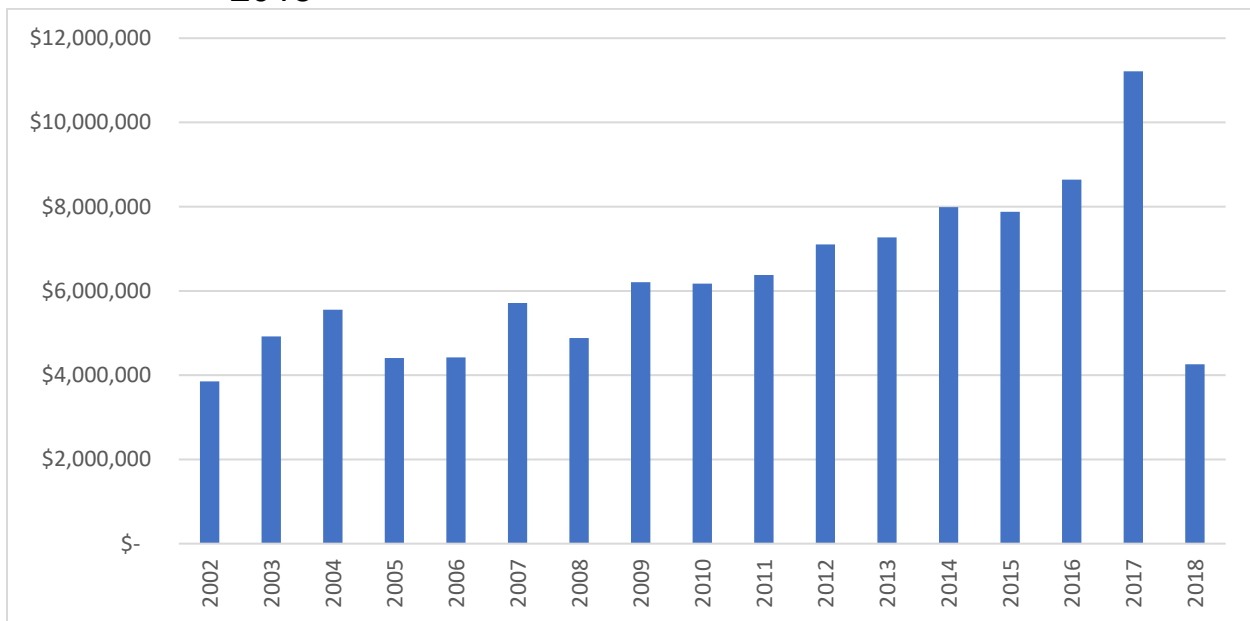
Graphs 221 through 223 show that number of employees at health and personal care stores in ZIP 67203 was fairly stable from 2002 through 2017, but decreased by nearly 40 percent in 2018. This decrease was also reflected in total wages and the average wage.

Graph 221: ZIP 67203, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018



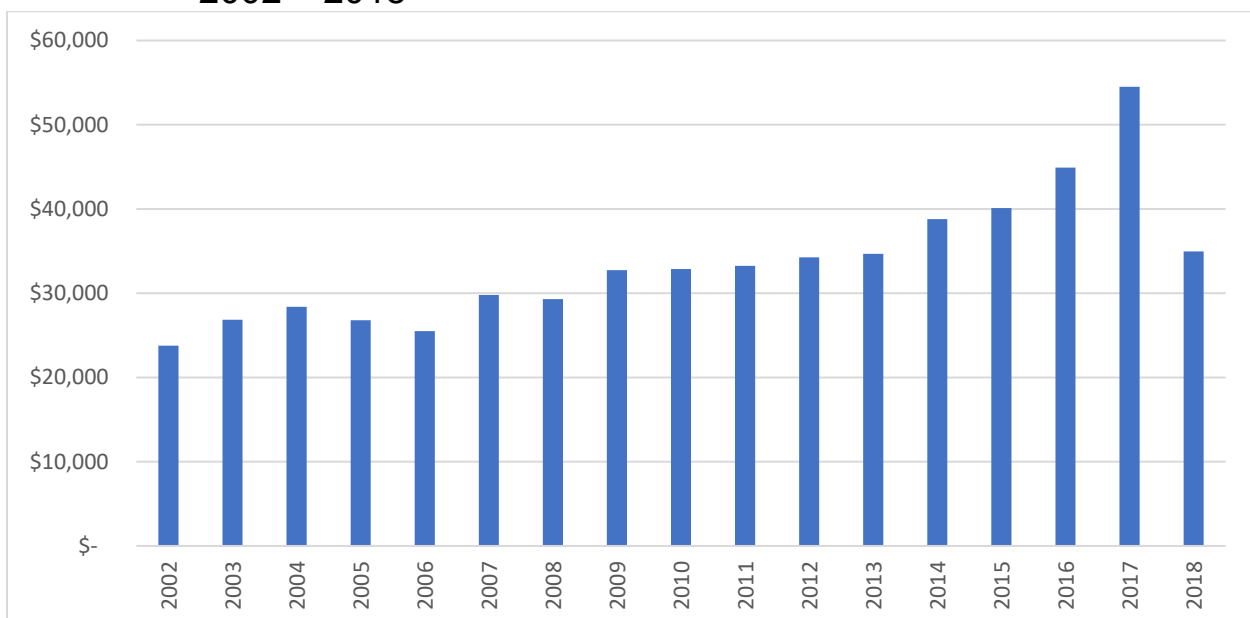
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 222: ZIP 67203, Total Wages, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

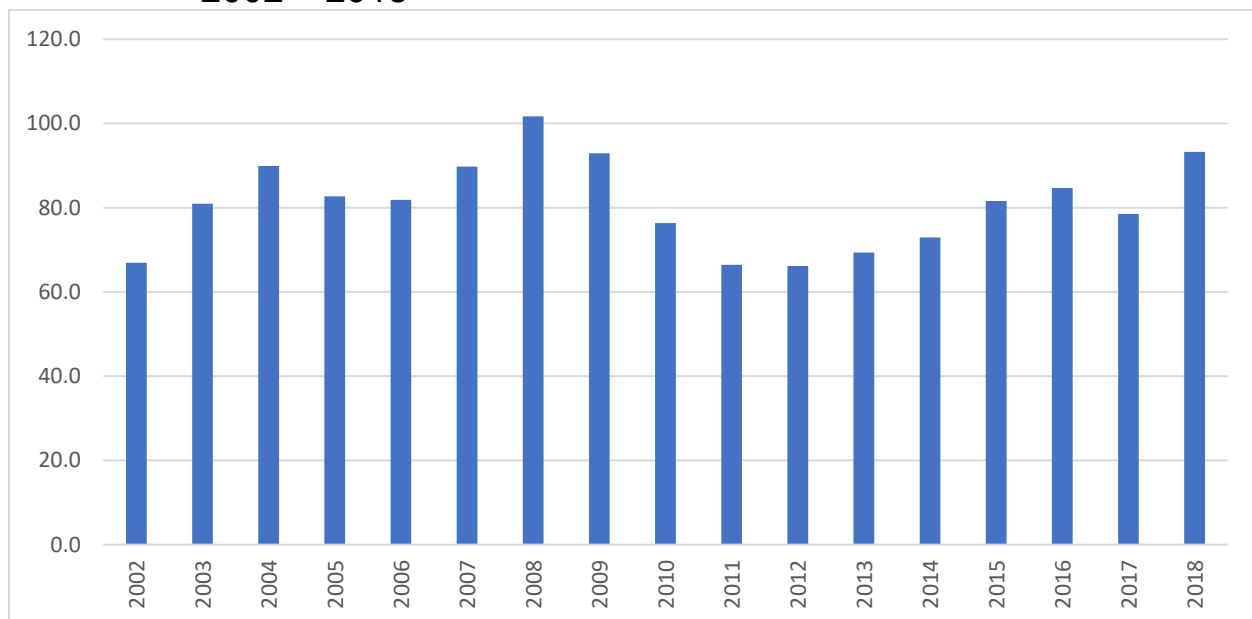
**Graph 223: ZIP 67203, Average Wage, Health & Personal Care Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 224 shows that the number of employees of gasoline stations has varied between 66 and 101 people between 2002 and 2018. There were no abrupt changes from one year to the next, although there is some fluctuation in number of employees over the total time period.

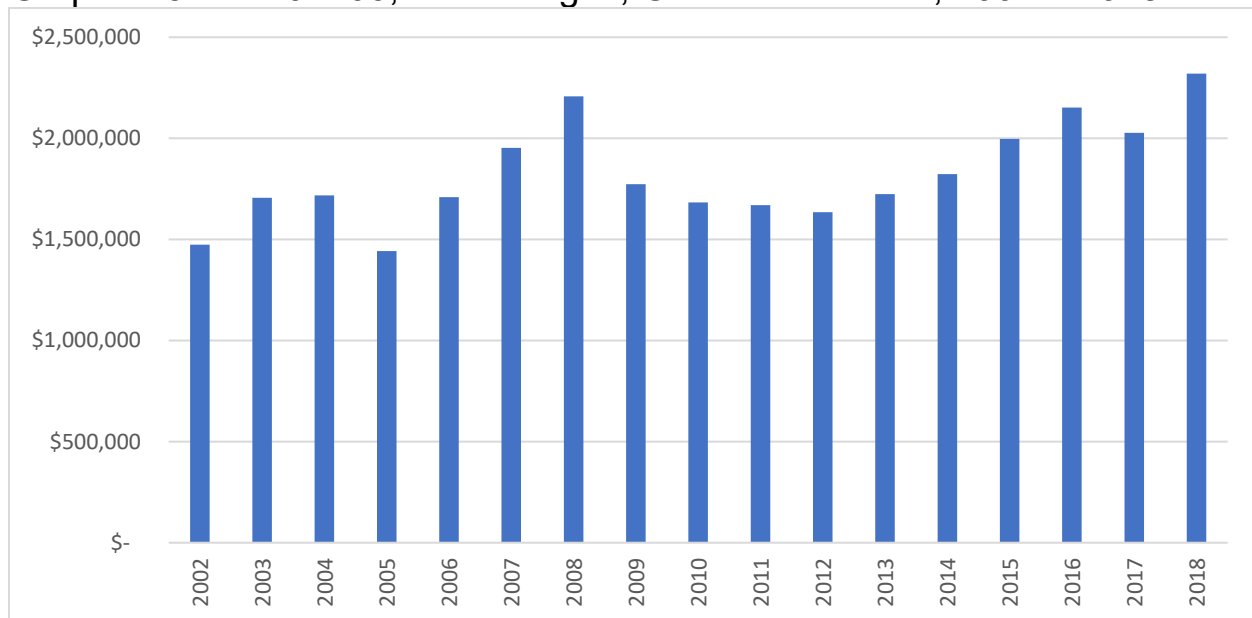
Graph 224: ZIP 67203, Average Number of Employees, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

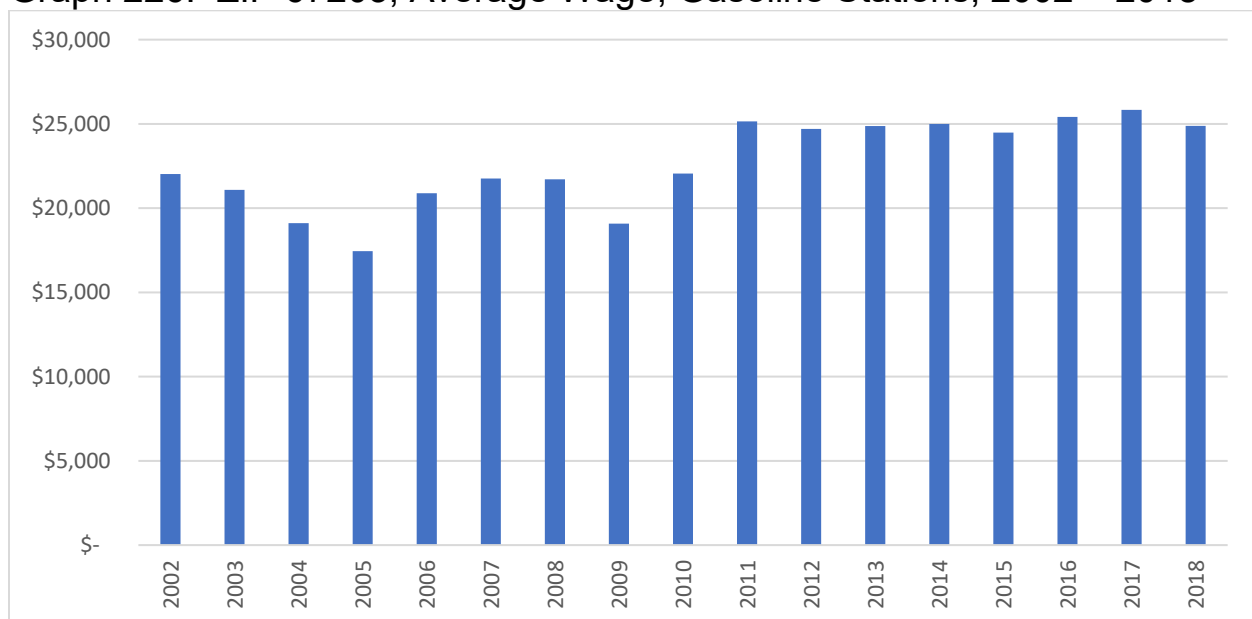
Graphs 225 and 226 show that total wages and average wage follow the changes in number of employees at gasoline stations in ZIP 67203.

**Graph 225: ZIP 67203, Total Wages, Gasoline Stations, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

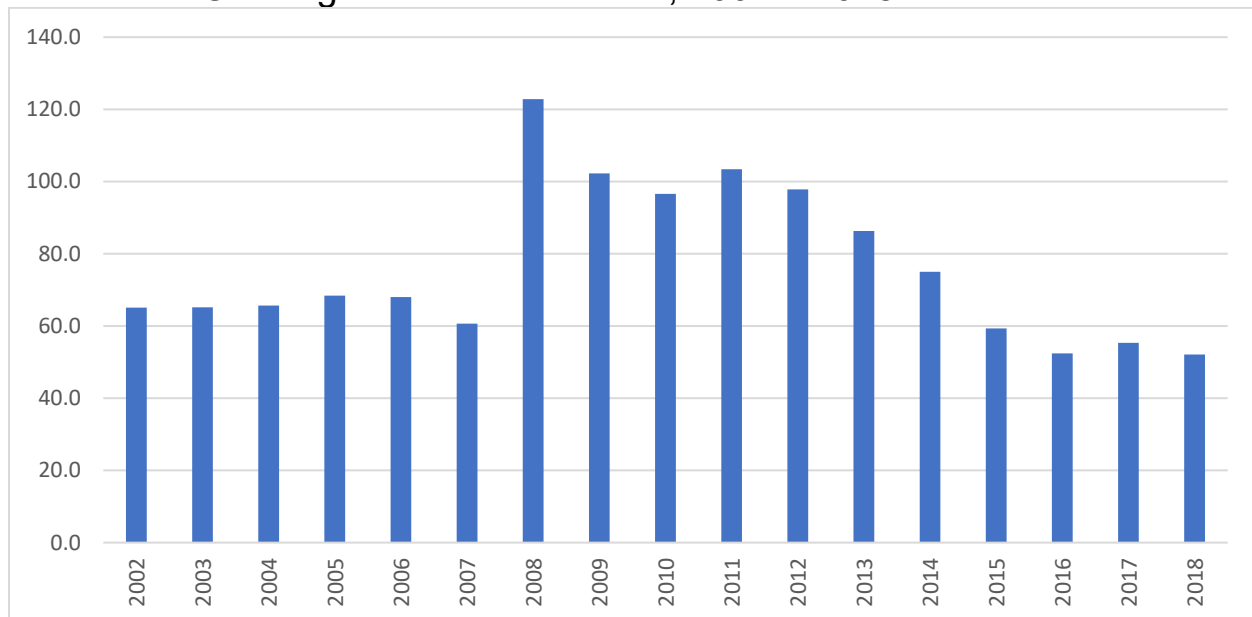
**Graph 226: ZIP 67203, Average Wage, Gasoline Stations, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 227 shows that there was a doubling in the number of employees of clothing and clothing accessories stores in ZIP 67203 that occurred in 2008. This was followed by an ongoing decline in the number of employees, which stabilized in 2016 at a level slightly below the level from 2002 to 2007.

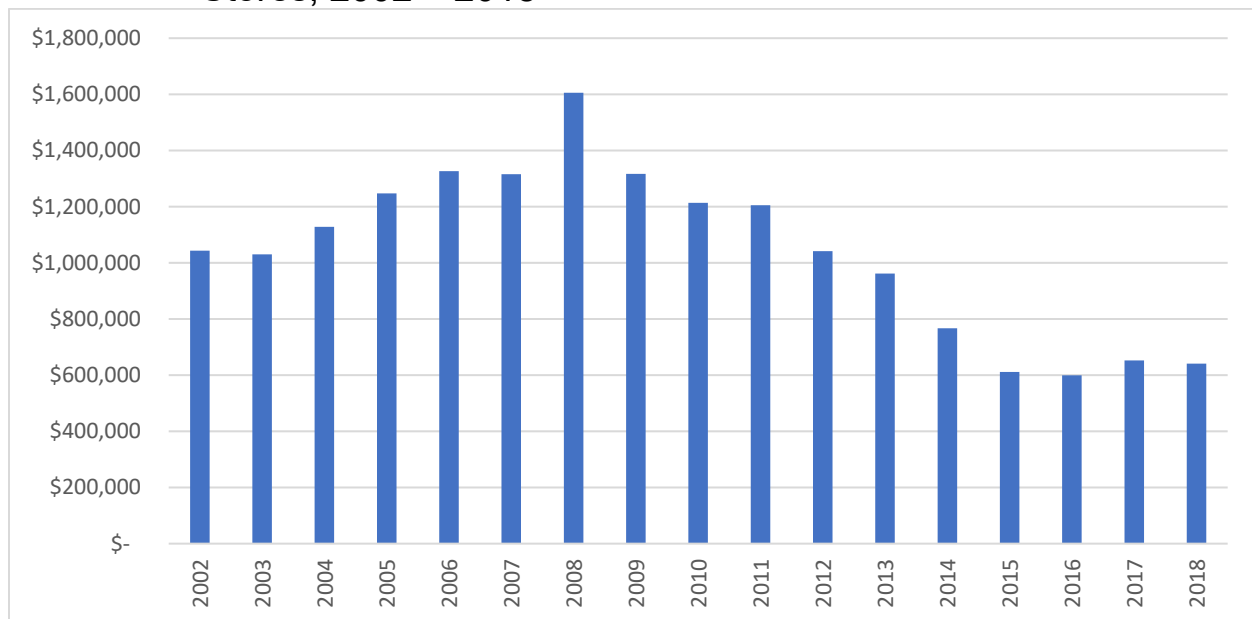
Graph 227: ZIP 67203, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



Graph 228: ZIP 67203, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018

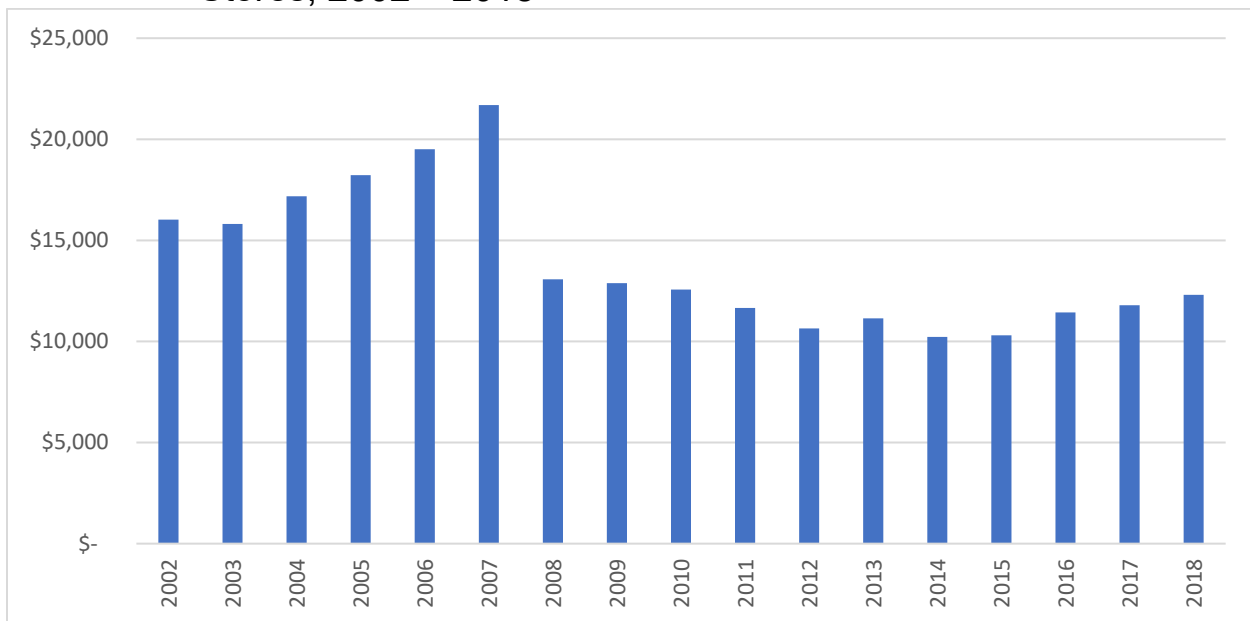


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 228 shows that total wages reached their highest point (\$1,600,000) in 2008 and then declined to a low of \$600,000.

Graph 229 shows that there was a rise in average wage from 2002 through 2007, followed by a sharp decline and then a relatively stable average wage level from 2008 to 2018.

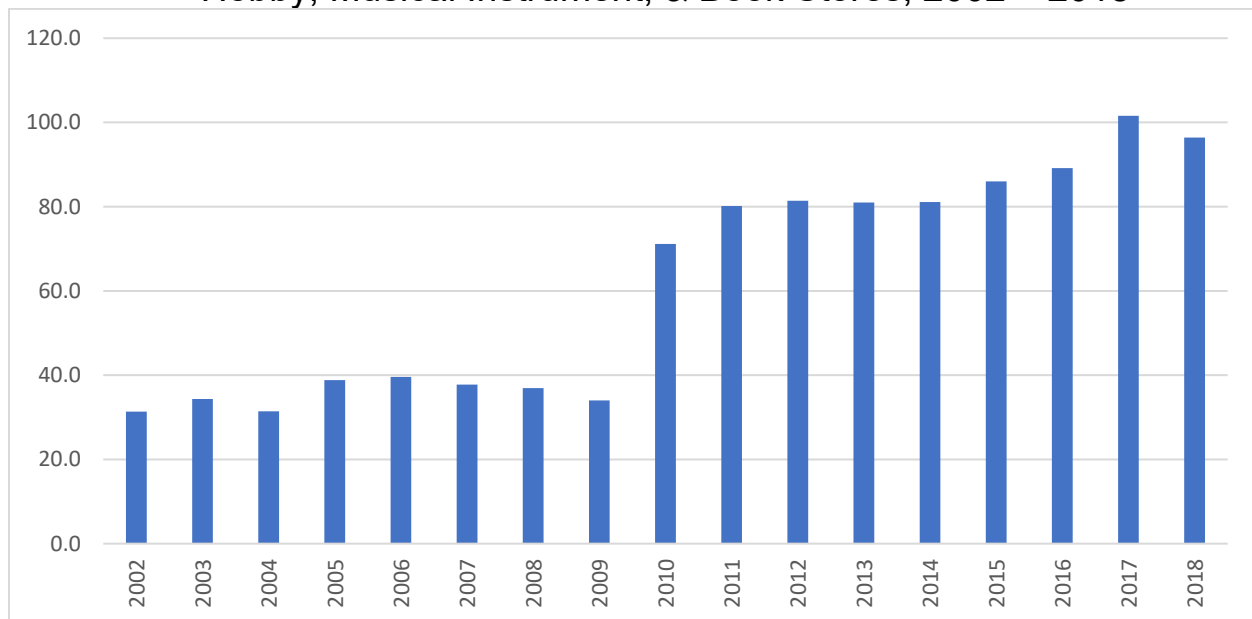
Graph 229: ZIP 67203, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

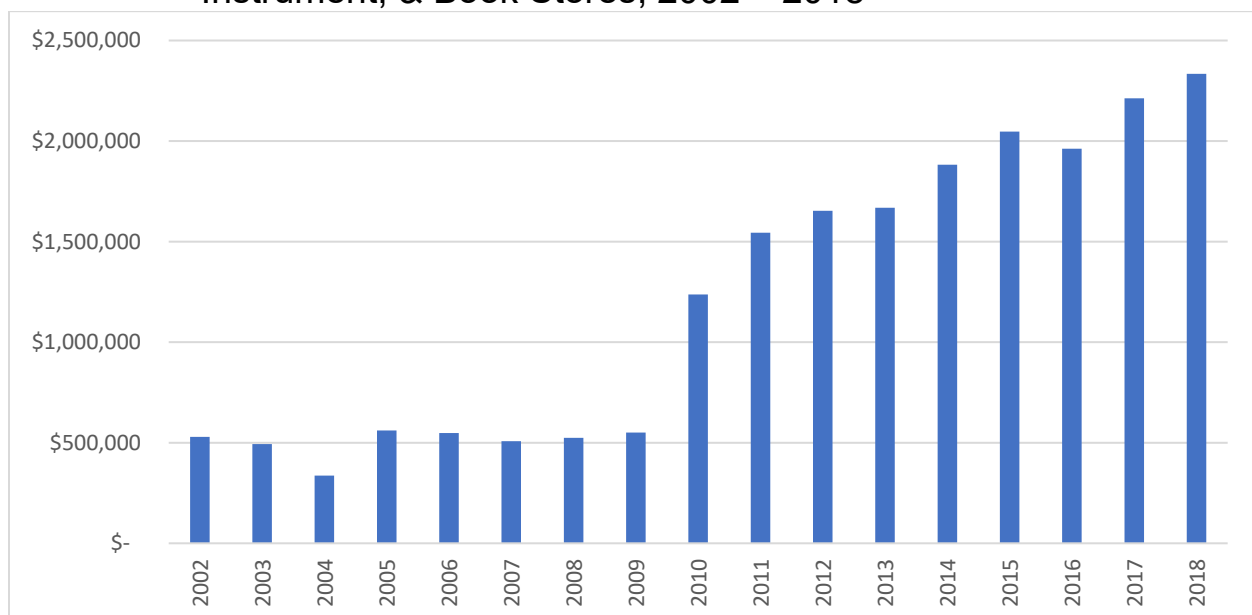
Graphs 230 through 232 show that in ZIP 67203 the number of employees in sporting goods, hobby, musical instrument, and book stores increased sharply in 2010. Although the size of the increase was small (37 people) the timing was similar to the increases in employees in food and beverage stores and in clothing and clothing accessories stores. The increase in the number of employees in sporting goods, hobby, musical instrument, and book stores was also reflected in total wages and the average wage.

**Graph 230: ZIP 67203, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



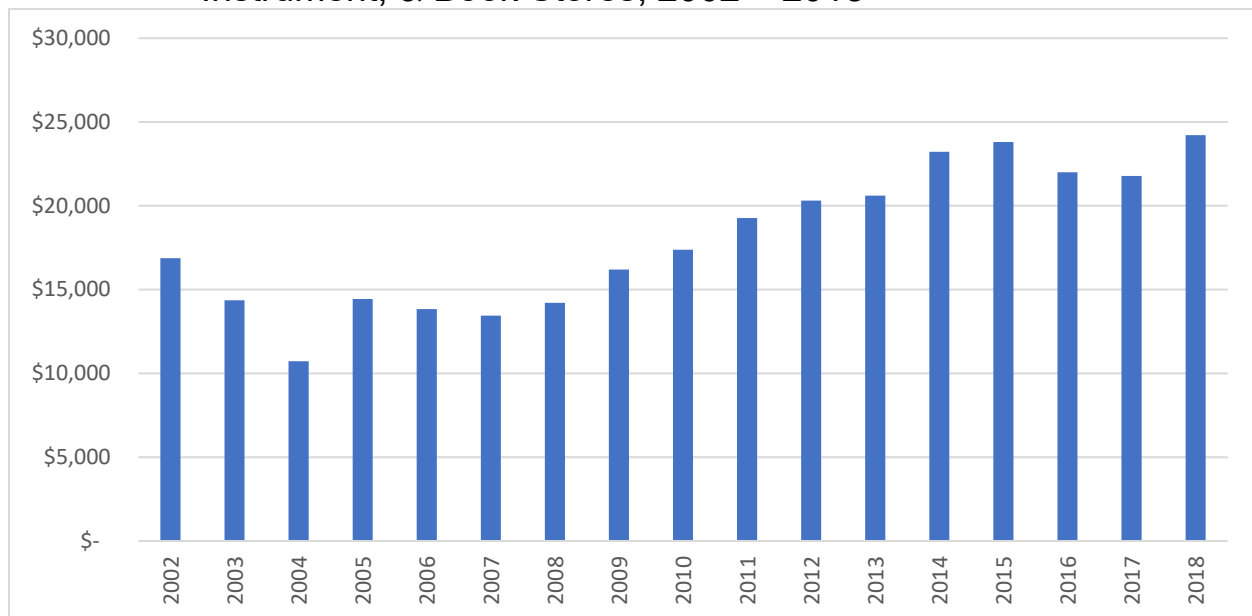
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 231: ZIP 67203, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

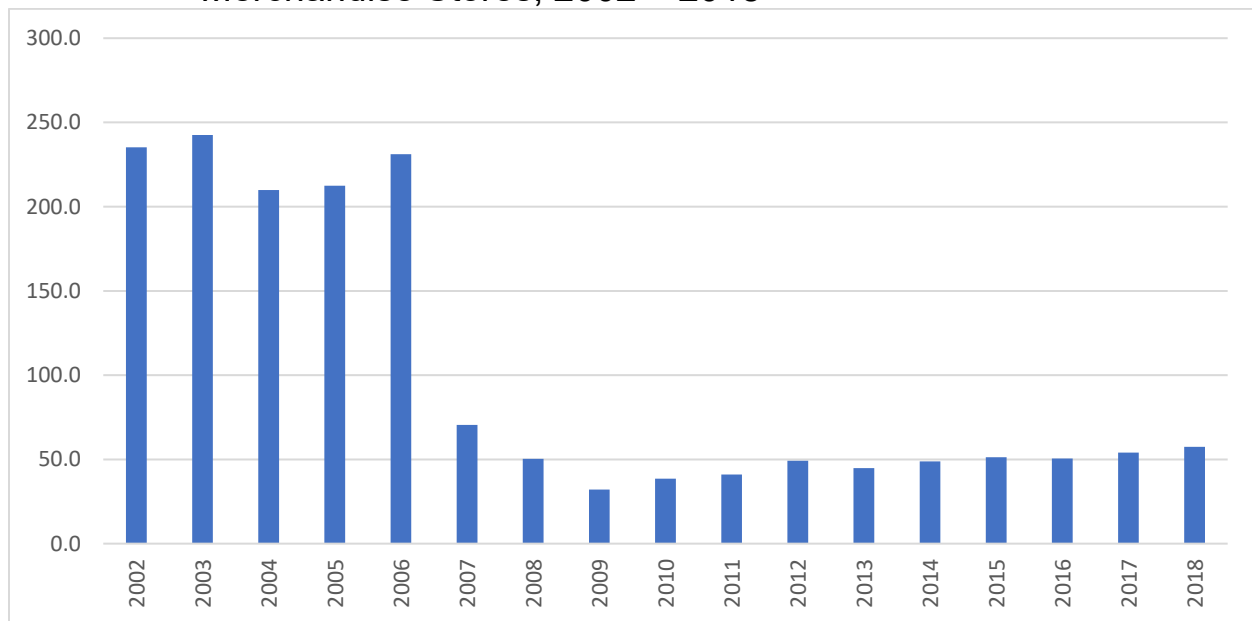
Graph 232: ZIP 67203, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

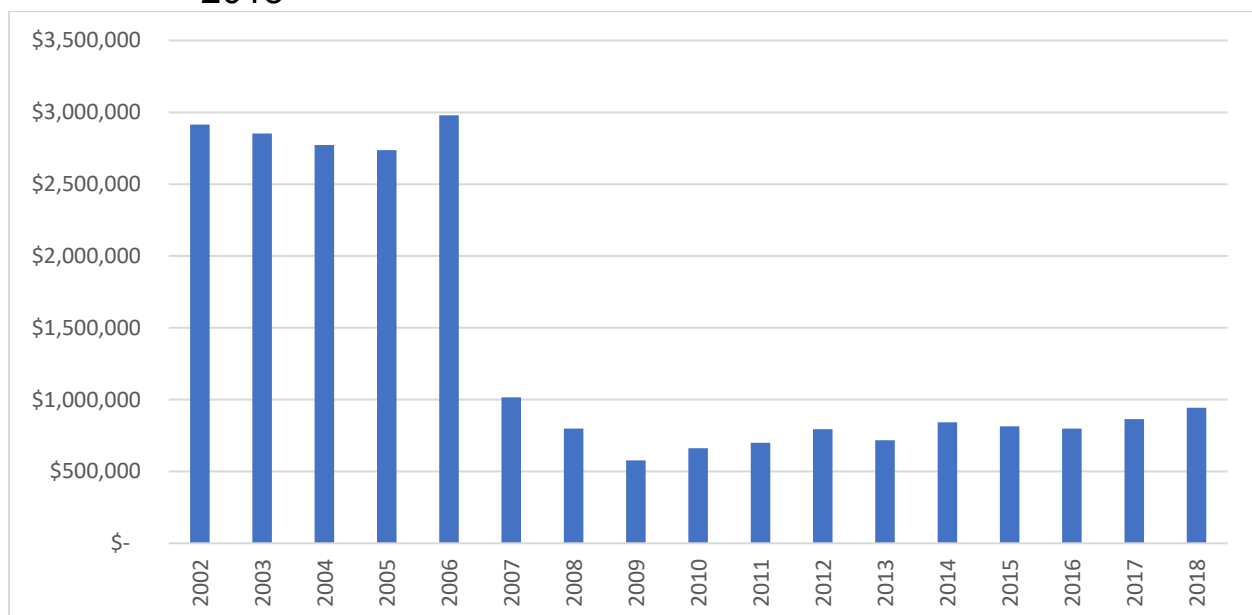
Graphs 233 through 235 show that the number of employees in general merchandise stores decreased substantially in 2007. The level of employment was relatively flat both before and after the event that caused the decline. Total wages, of course, show the same pattern; however, the average wage actually increased.

**Graph 233: ZIP 67203, Average Number of Employees, General Merchandise Stores, 2002 – 2018**



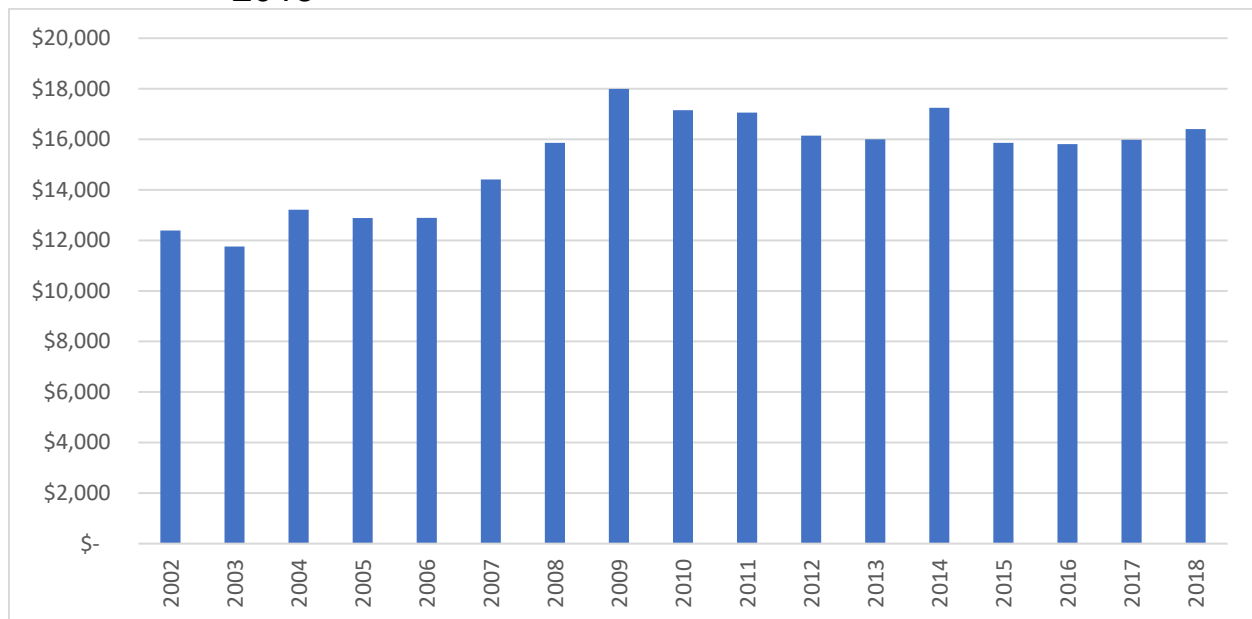
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 234: ZIP 67203, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

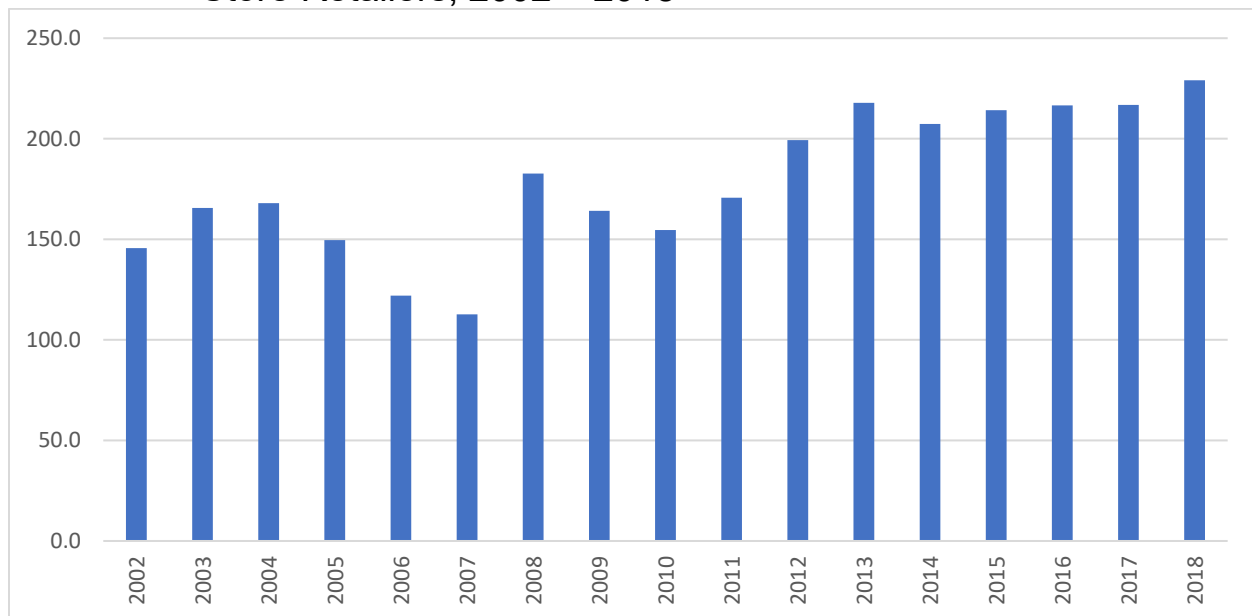
Graph 235: ZIP 67203, Average Wage, General Merchandise Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

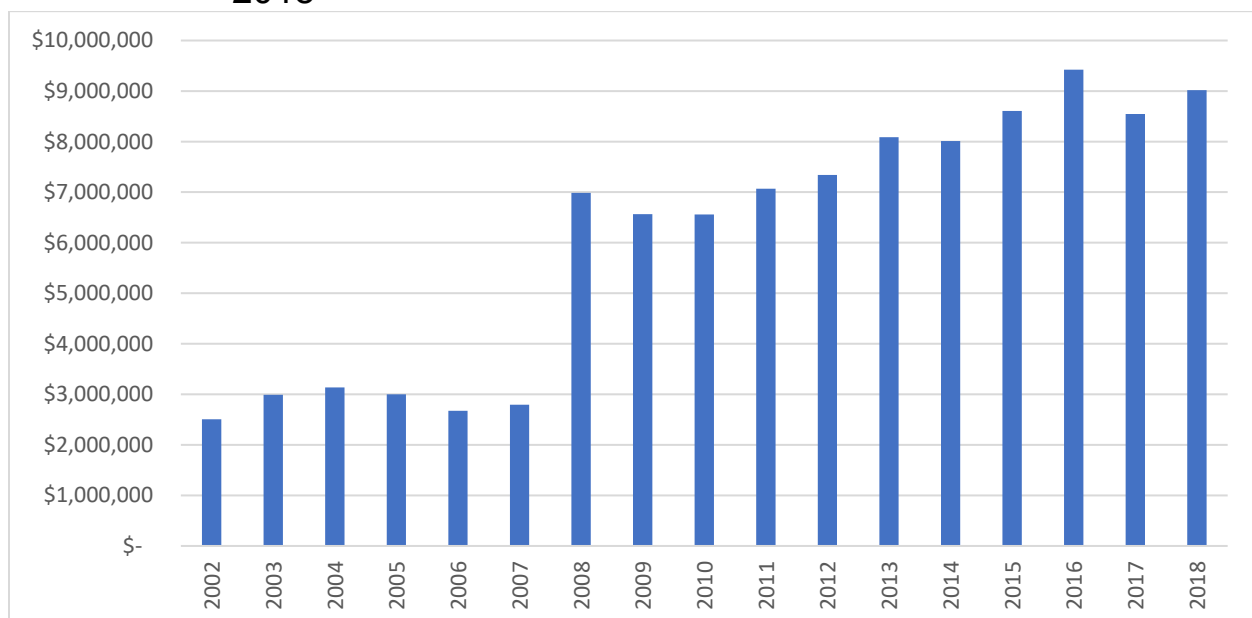
Graphs 236 through 238 show that in ZIP 67203 the number of employees of miscellaneous store retailers increased from slightly below 150 to about 225 over the period from 2002 to 2018. The graph of total wages suggests that something happened in 2008 that led to an obvious increase in total wages.

**Graph 236: ZIP 67203, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



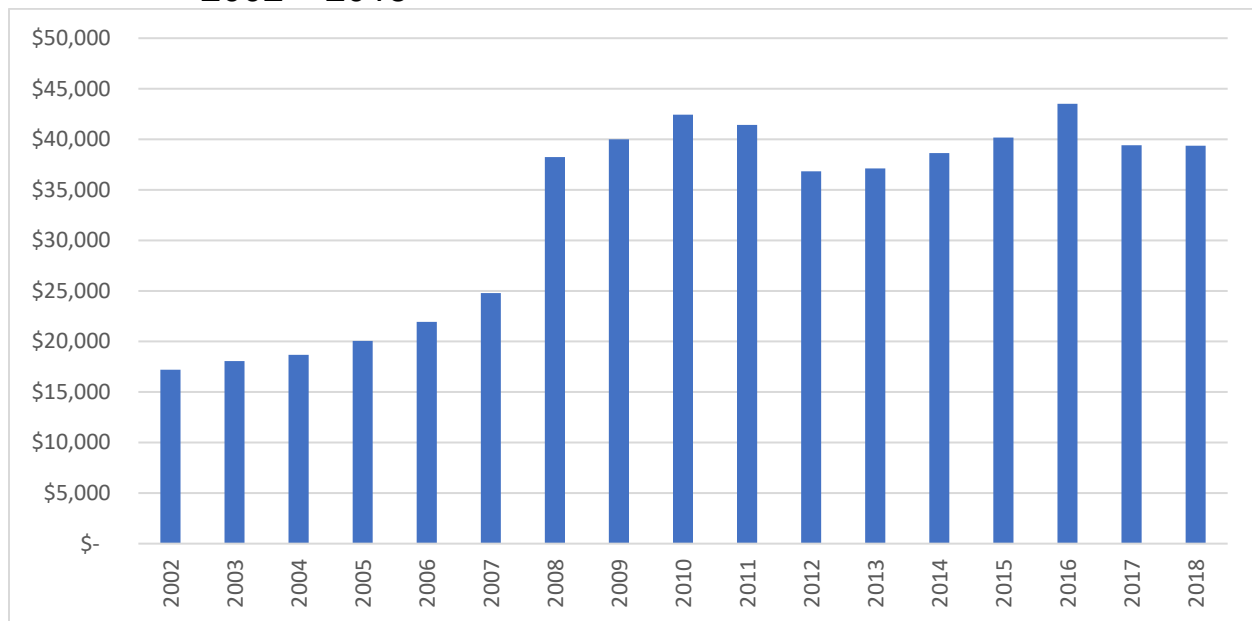
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 237: ZIP 67203, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 238: ZIP 67203, Average Wage, Miscellaneous Store Retailers, 2002 – 2018

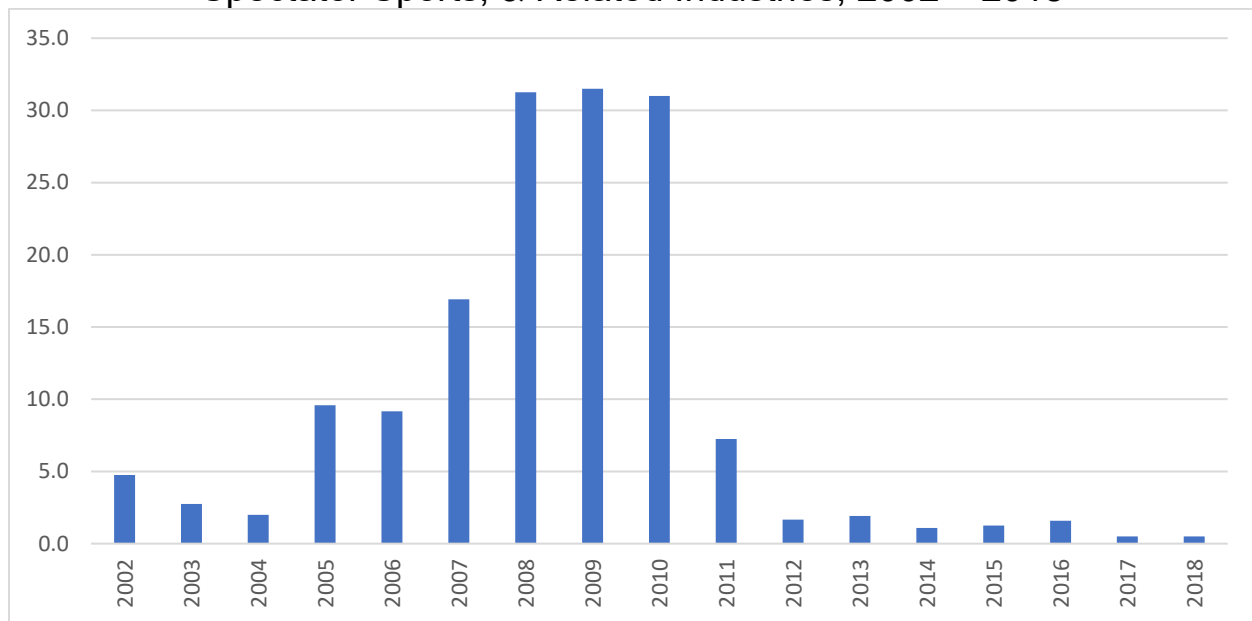


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 239 through 241 show that in ZIP 67203 there were three years, 2008 – 2010, in which there were more than 30 employees in the performing arts, spectator sports, and related industries. For most of the years between 2002 and 2018 there were fewer than 5 employees.

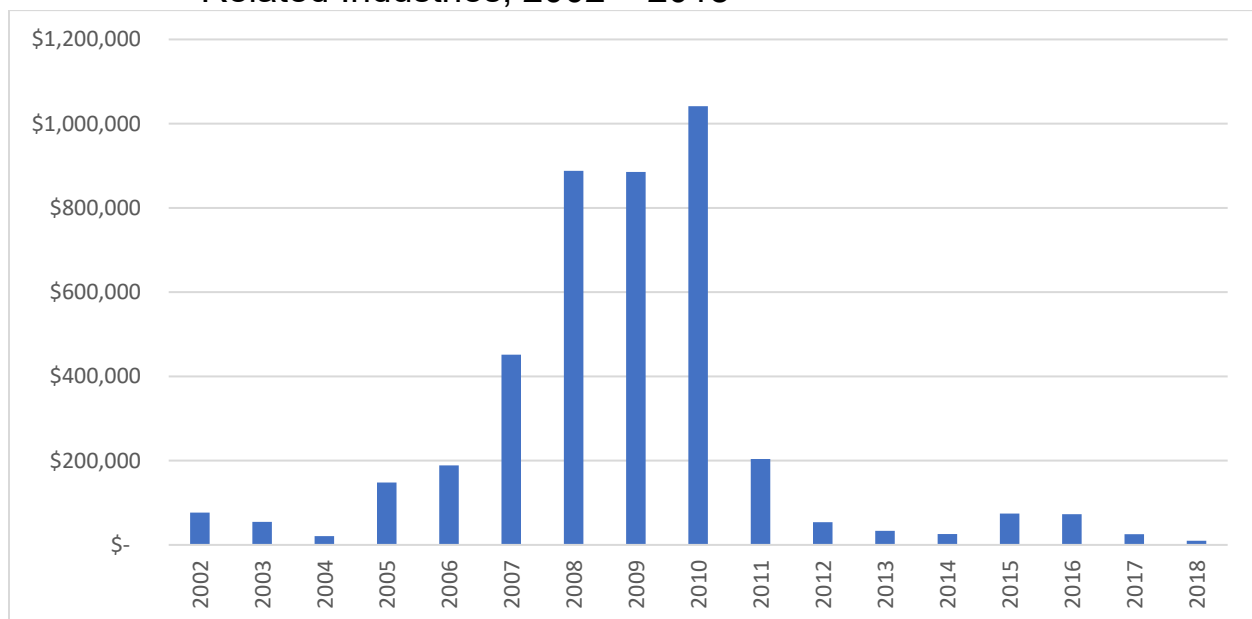


**Graph 239: ZIP 67203, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



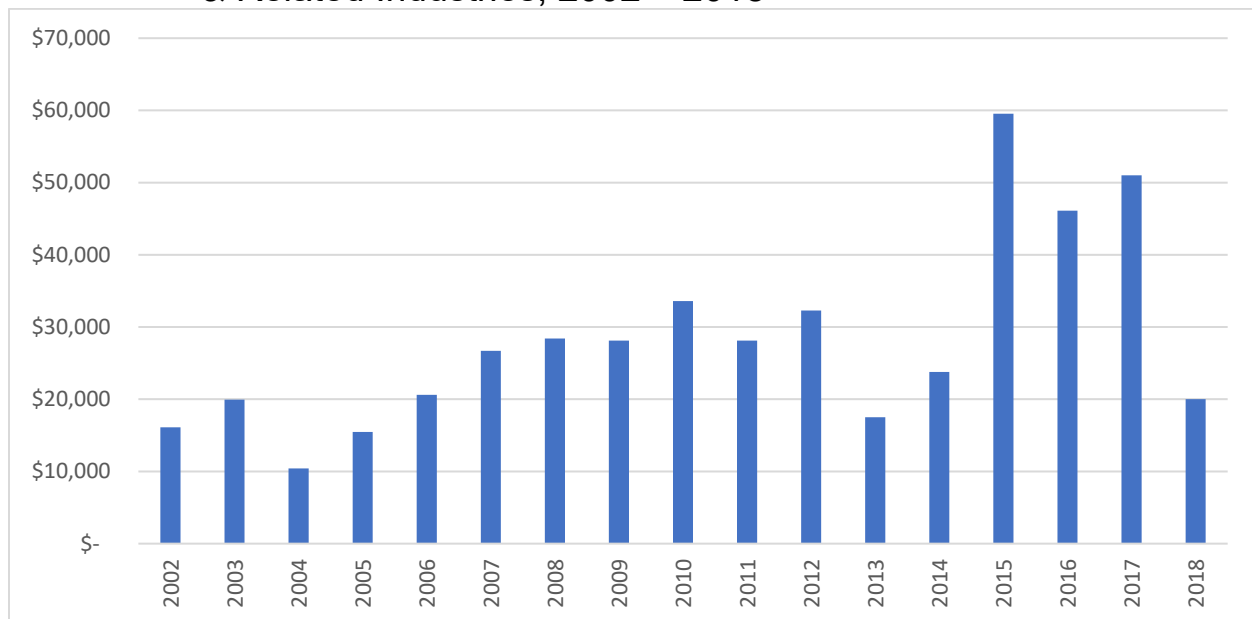
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 240: ZIP 67203, Total Wages, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



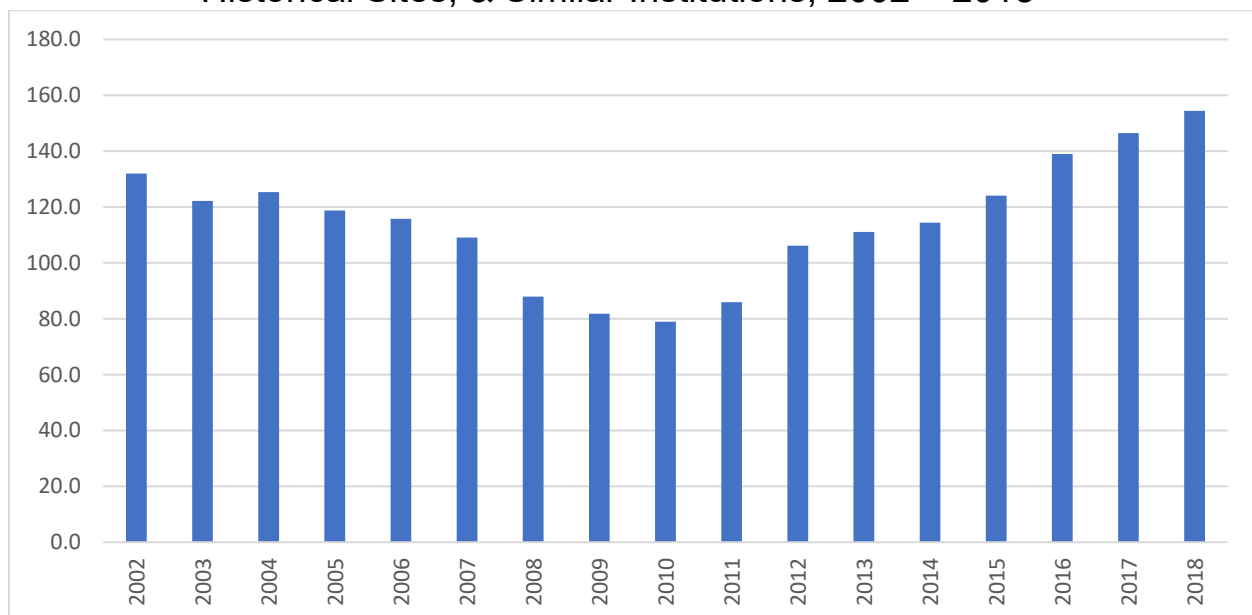
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 241: ZIP 67203, Average Wage, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

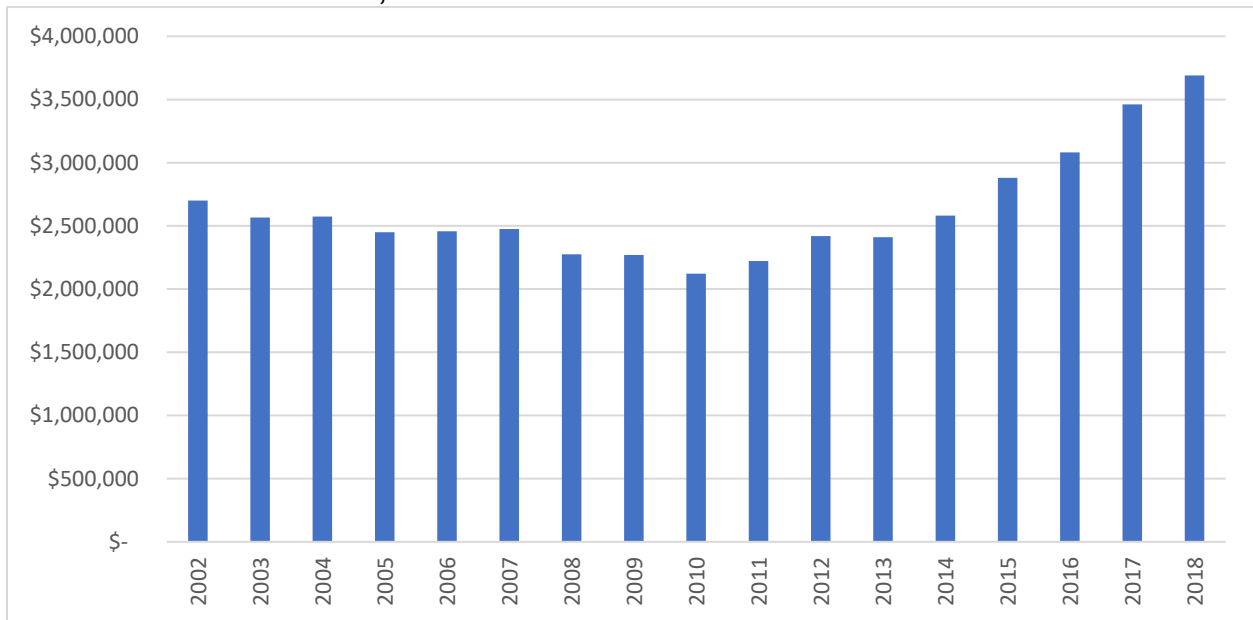
**Graph 242: ZIP 67203, Average Number of Employees, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

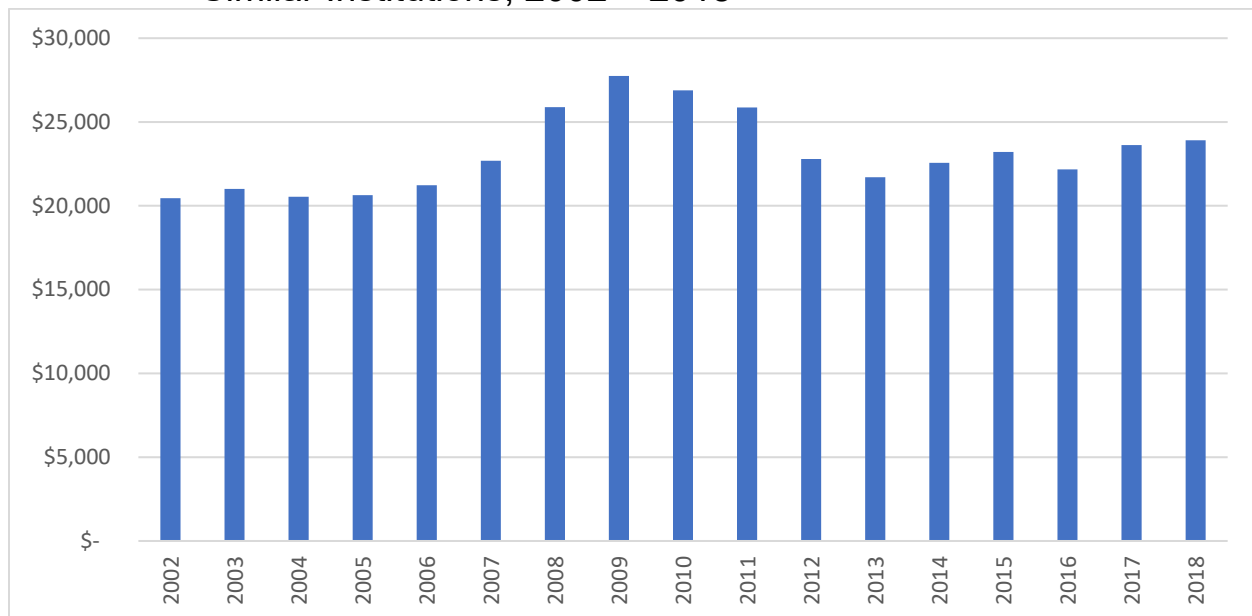
Graph 242 shows that the number of employees of museums, historical sites, and similar institutions were on a downward slope until 2010 and that starting with 2011 the number of employees has steadily increased. Total wages, as shown by Graph 243, were \$3,700,000 in 2018.

**Graph 243: ZIP 67203, Total Wages, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

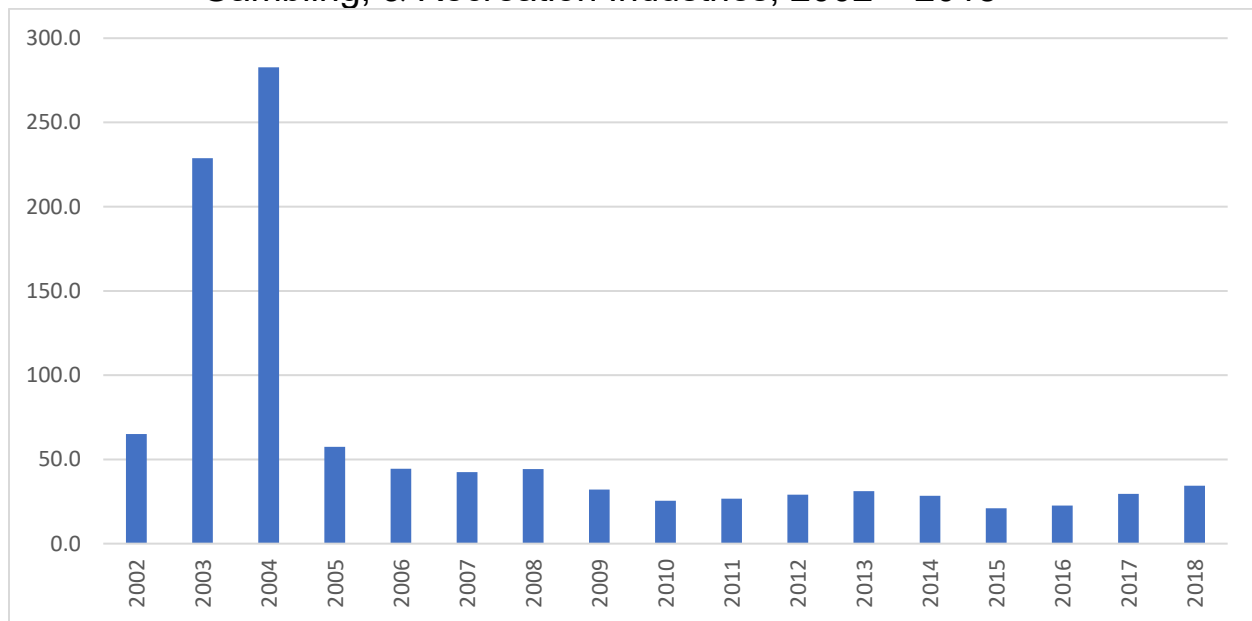
**Graph 244: ZIP 67203, Average Wage, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

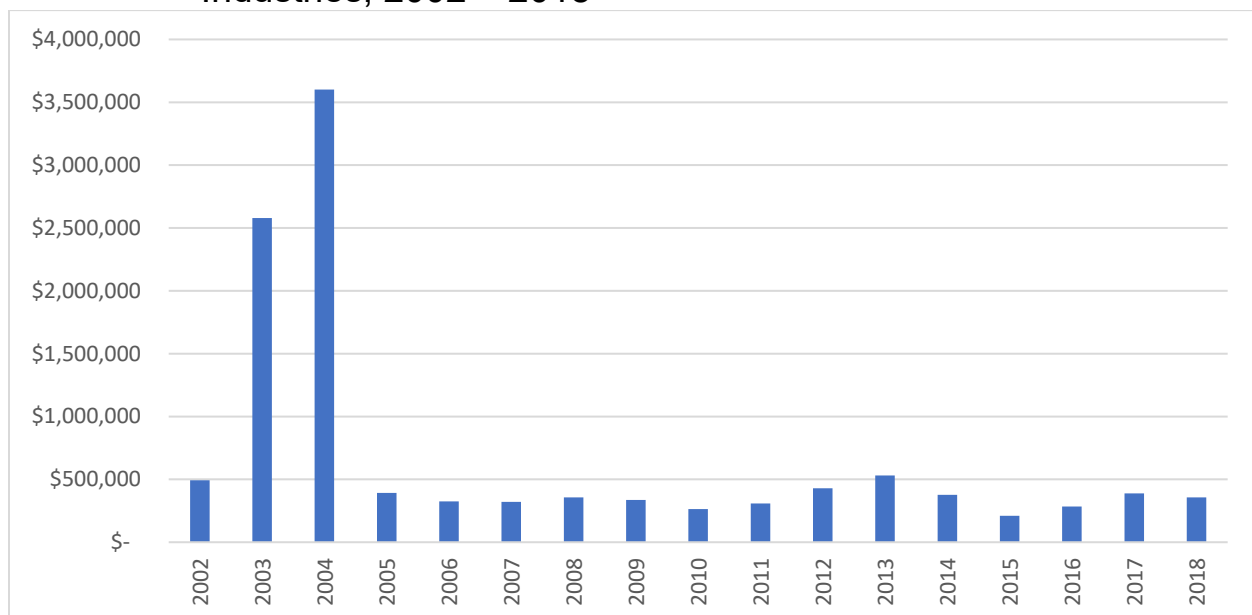
Graphs 245 through 247 show that in ZIP 67203 there was a spike in the number of employees in amusement, gambling, and recreational industries during 2003 and 2004. For the remainder of the time from 2006 through 2018 there were fewer than 50 employees in this sector. Total wages, Graph 246, were below \$500,000 from 2005 except for 2013 when they were slightly more.

**Graph 245: ZIP 67203, Average Number of Employees, Amusement, Gambling, & Recreation Industries, 2002 – 2018**



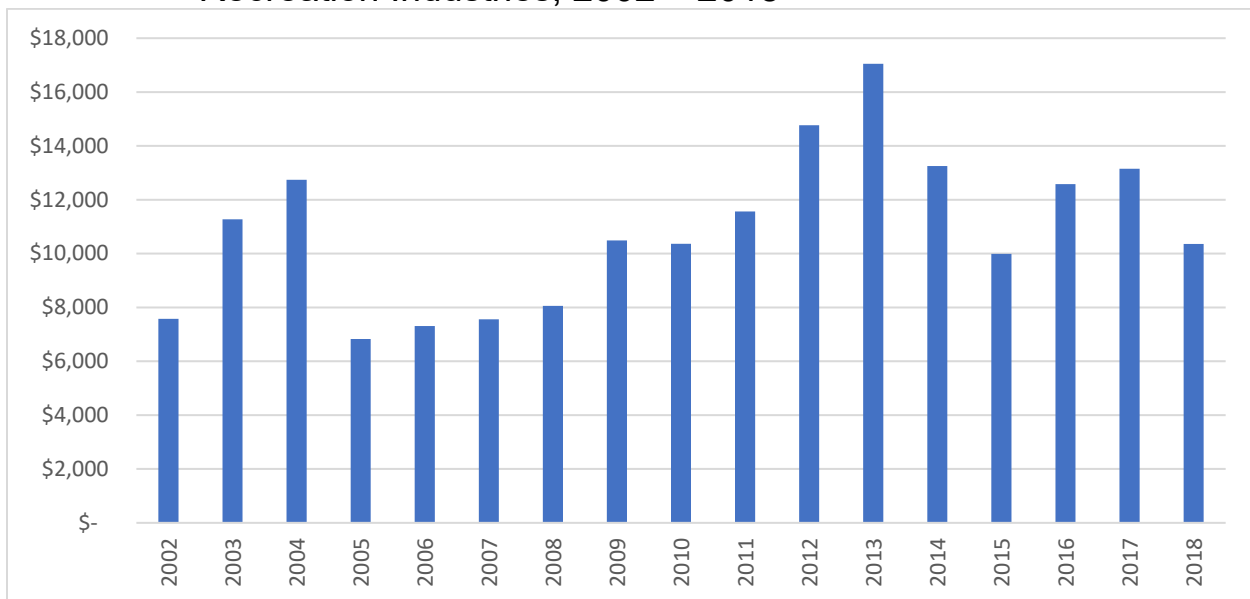
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 246: ZIP 67203, Total Wages, Amusement, Gambling, & Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

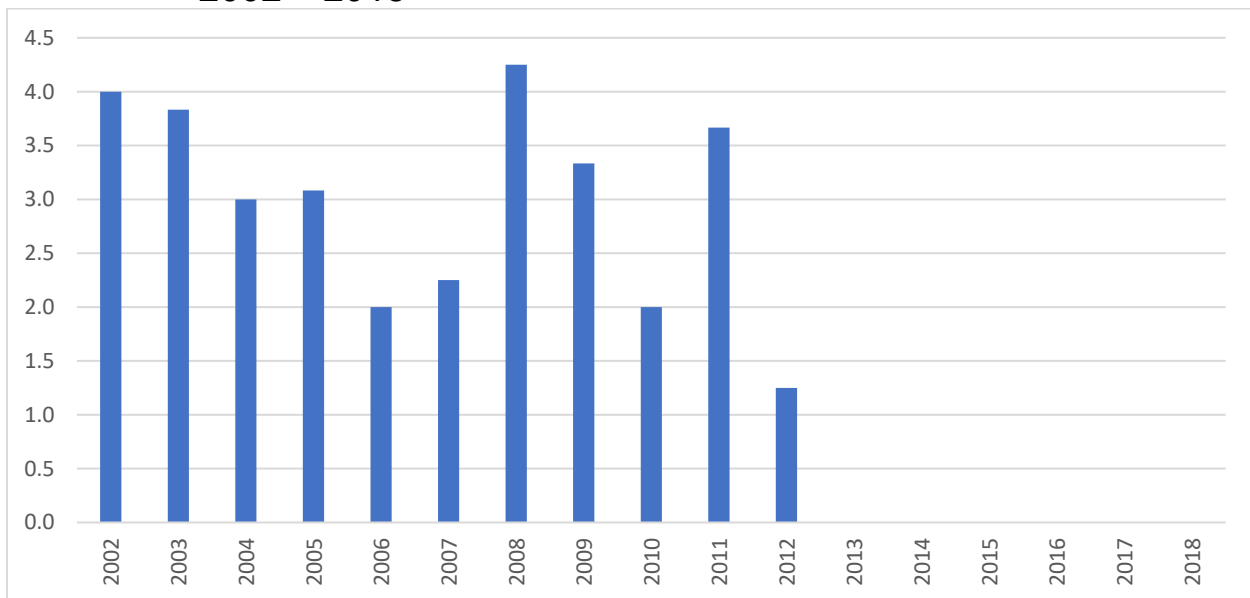
**Graph 247: ZIP 67203, Average Wage, Amusement, Gambling, & Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

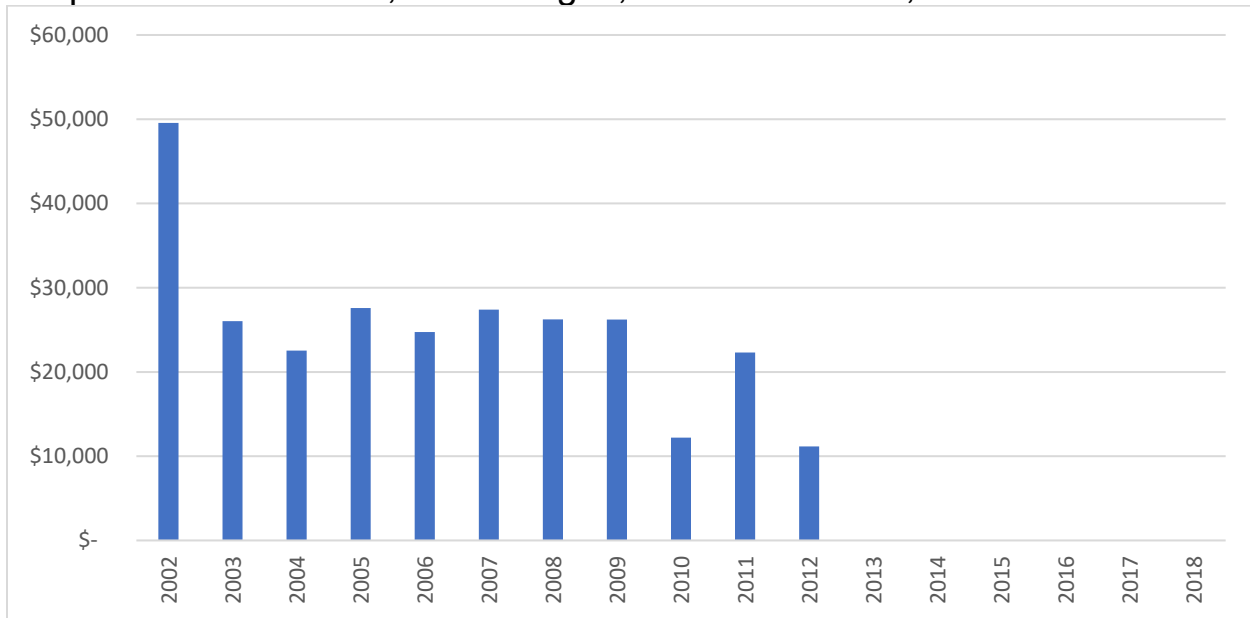
Graphs 248 through 250 show that in ZIP 67203 the accommodation sector is insignificant. At its height there were less than 4.5 employees and there have been no employees since 2013.

**Graph 248: ZIP 67203, Average Number of Employees, Accommodation, 2002 – 2018**



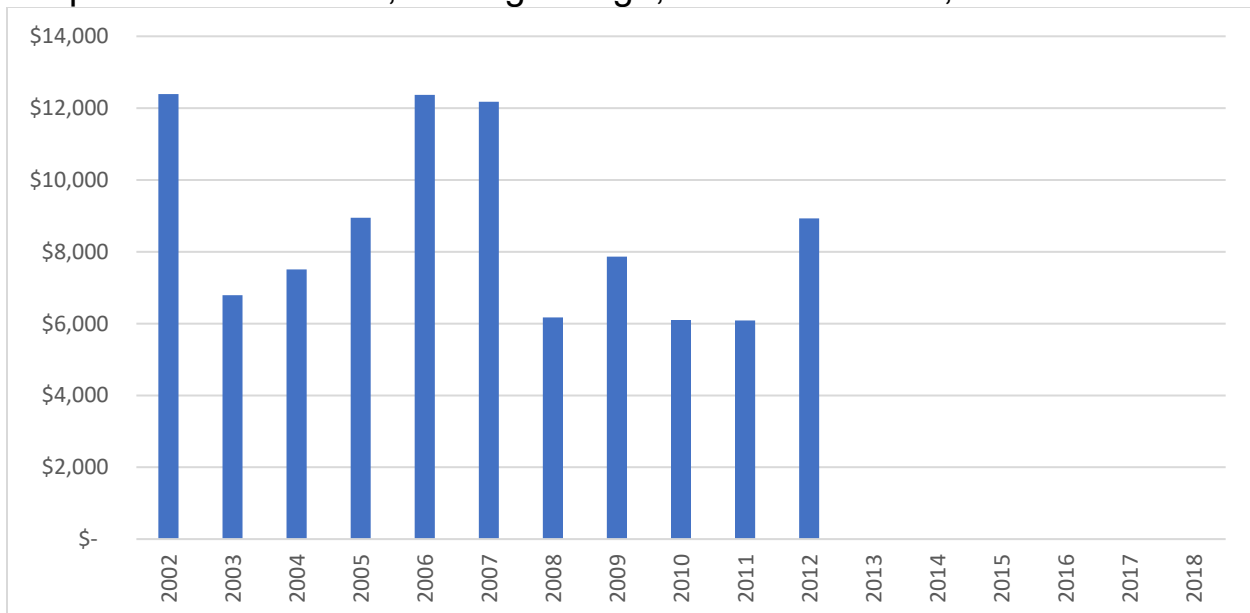
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 249: ZIP 67203, Total Wages, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

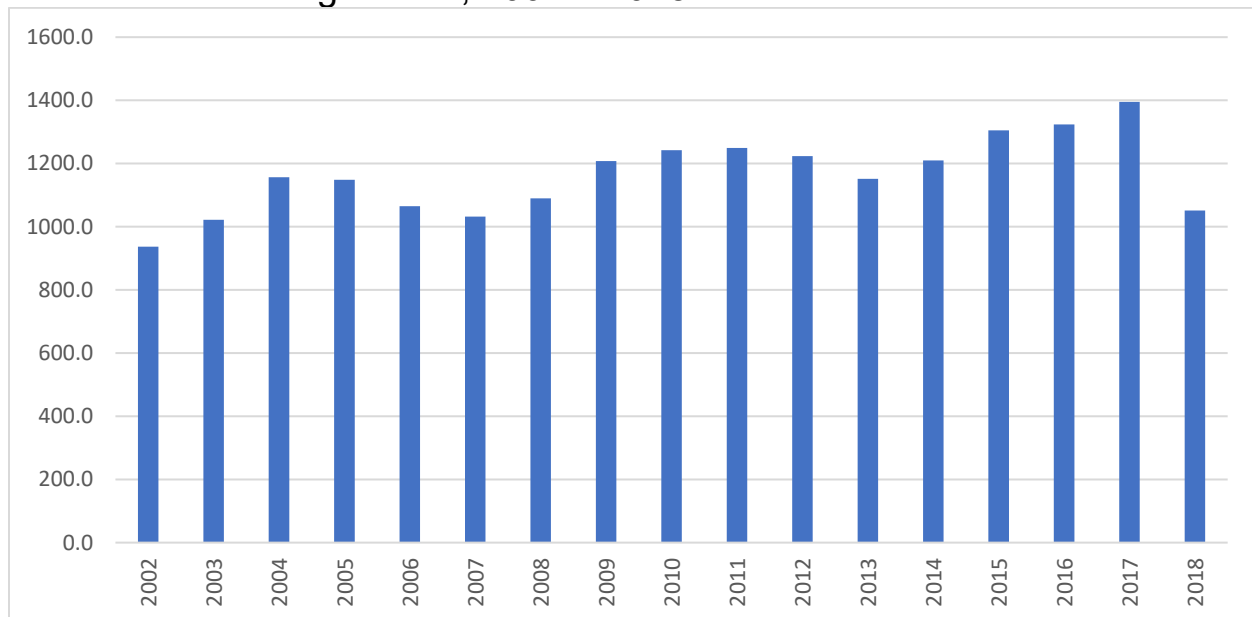
**Graph 250: ZIP 67203, Average Wage, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 251 through 253 show that the employees of food services and drinking places have gradually increased in a fluctuating pattern generally moving between about 1000 and 1300 people. Total wages and average wage have followed the same pattern.

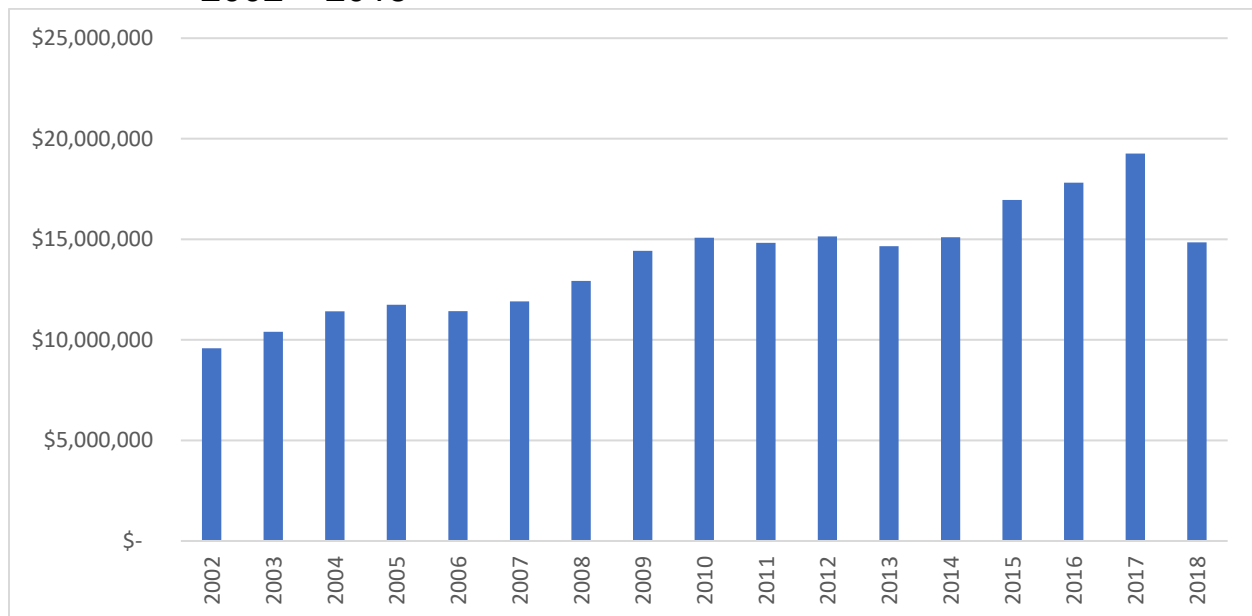
Graph 251: ZIP 67203, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

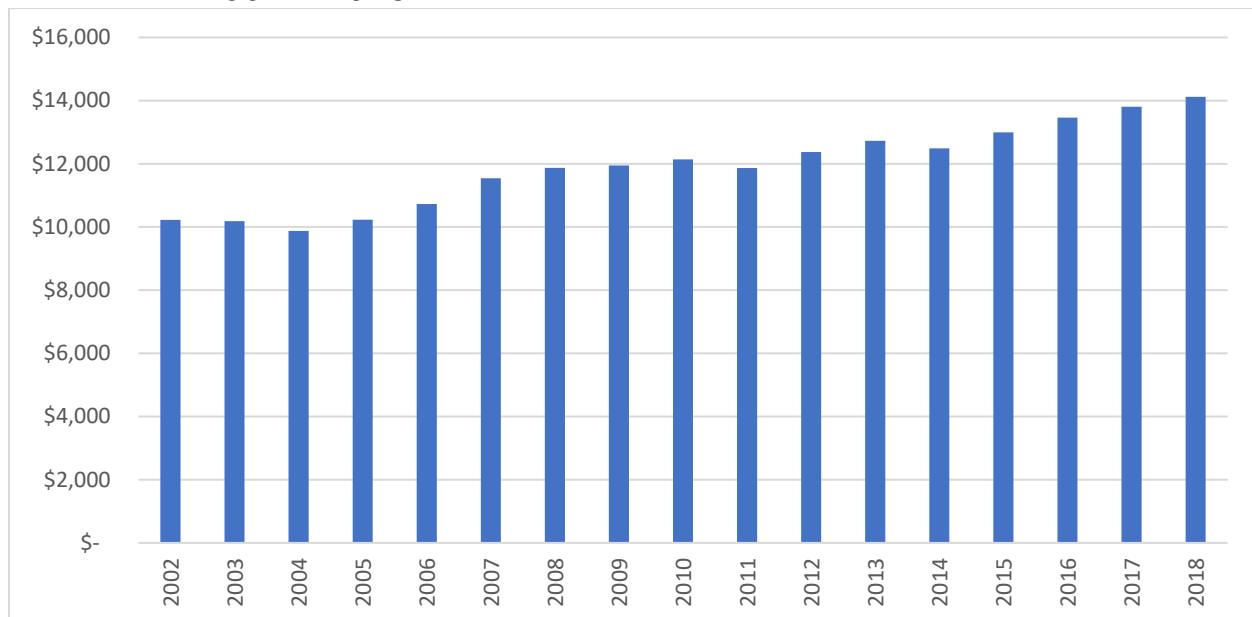


**Graph 252: ZIP 67203, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 253: ZIP 67203, Average Wage, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

## Wichita STAR Bond Projects

### Maps

Maps 16 through 19 show the progression of development of the land around the K96 Greenwich intersection beginning in 2002. Each successive map shows how development happens in stages and the importance of accessibility for development.

Map 16: K96 and Greenwich STAR Bond district, 4/2002



Source: U.S. Geological Survey, Retrieved from Google Earth.

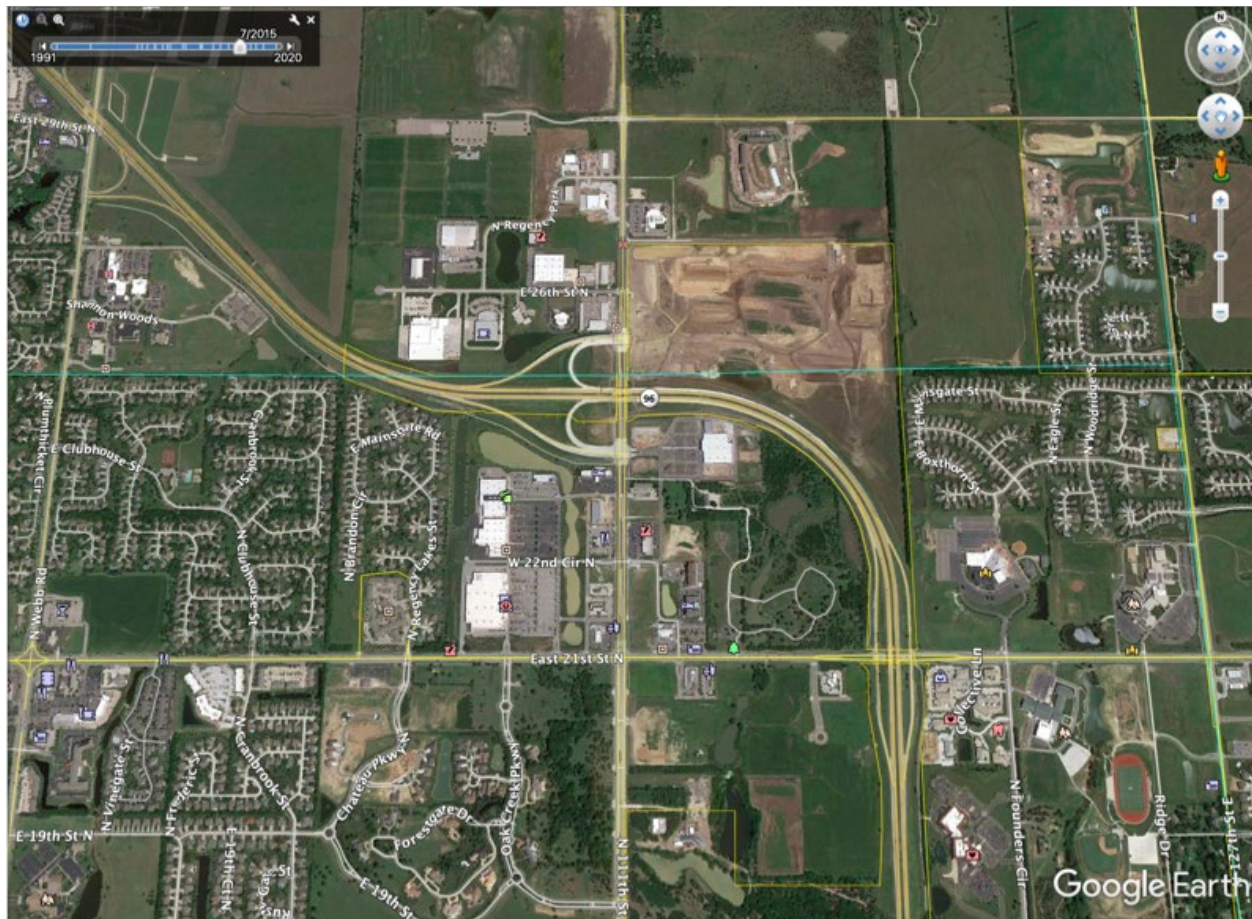
Map 17: K96 and Greenwich STAR Bond district, 2/2013



Source: Google Earth

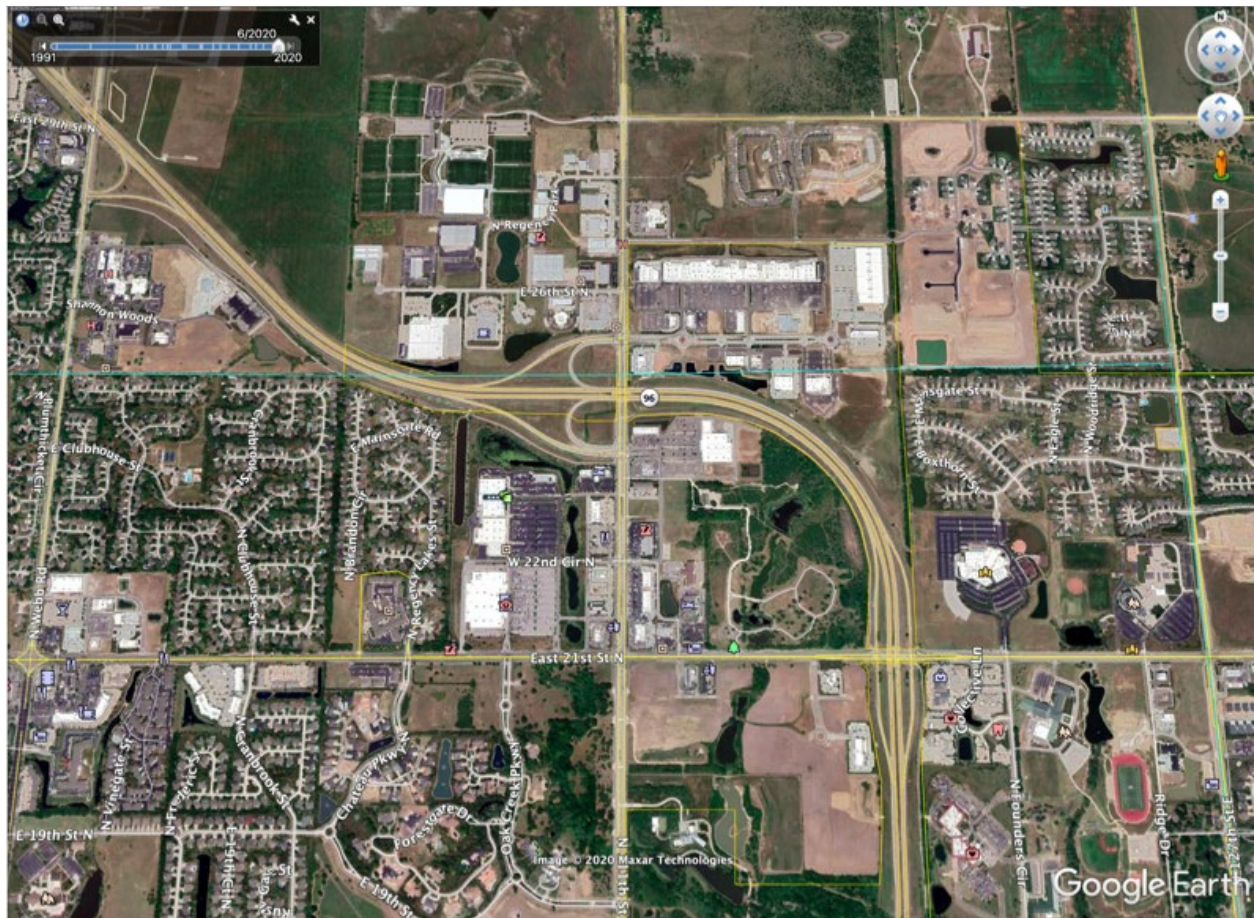


Map 18: K96 and Greenwich STAR Bond district, 7/2015



Source: Google Earth.

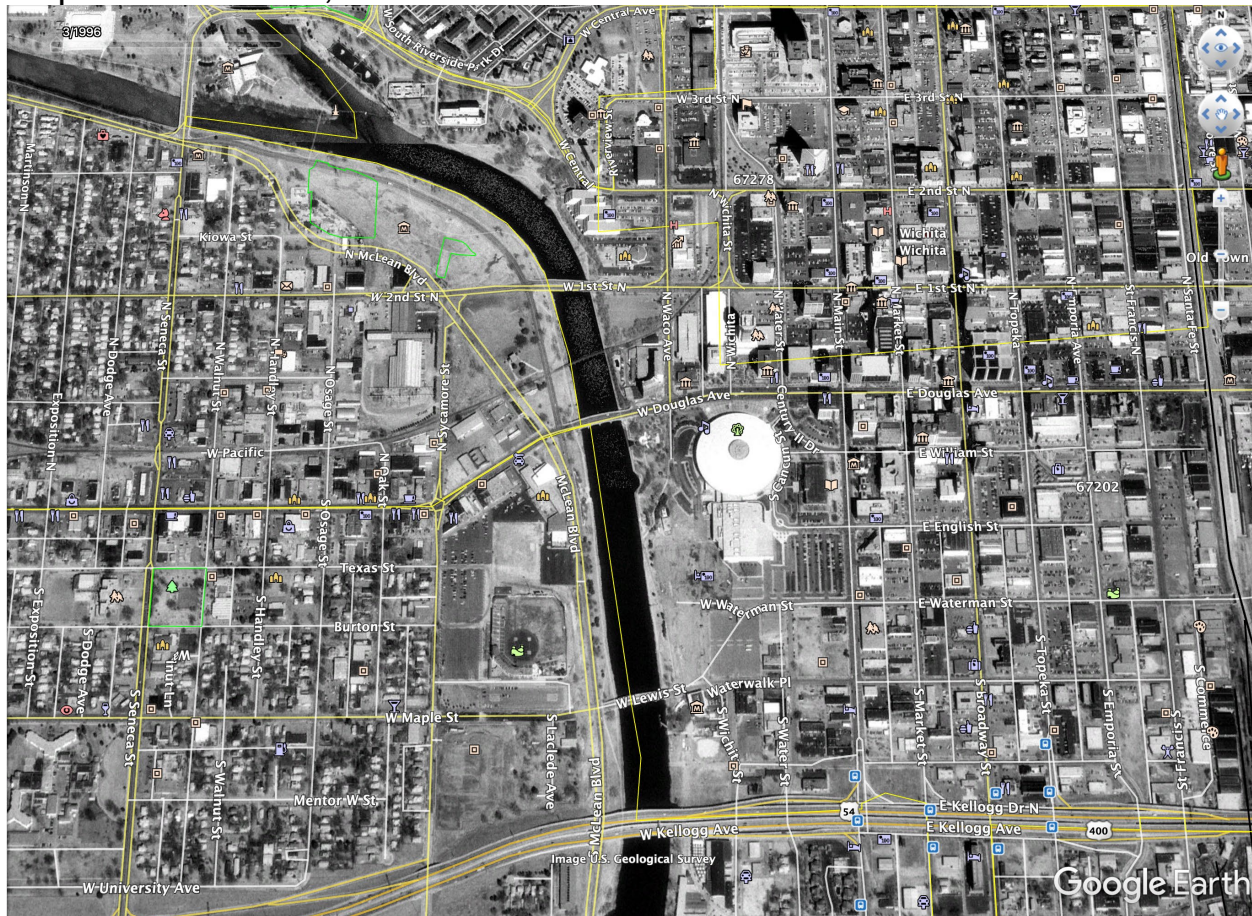
Map 19: K96 and Greenwich STAR Bond district, 6/2020



Source: Maxar Technologies, Retrieved from Google Earth.



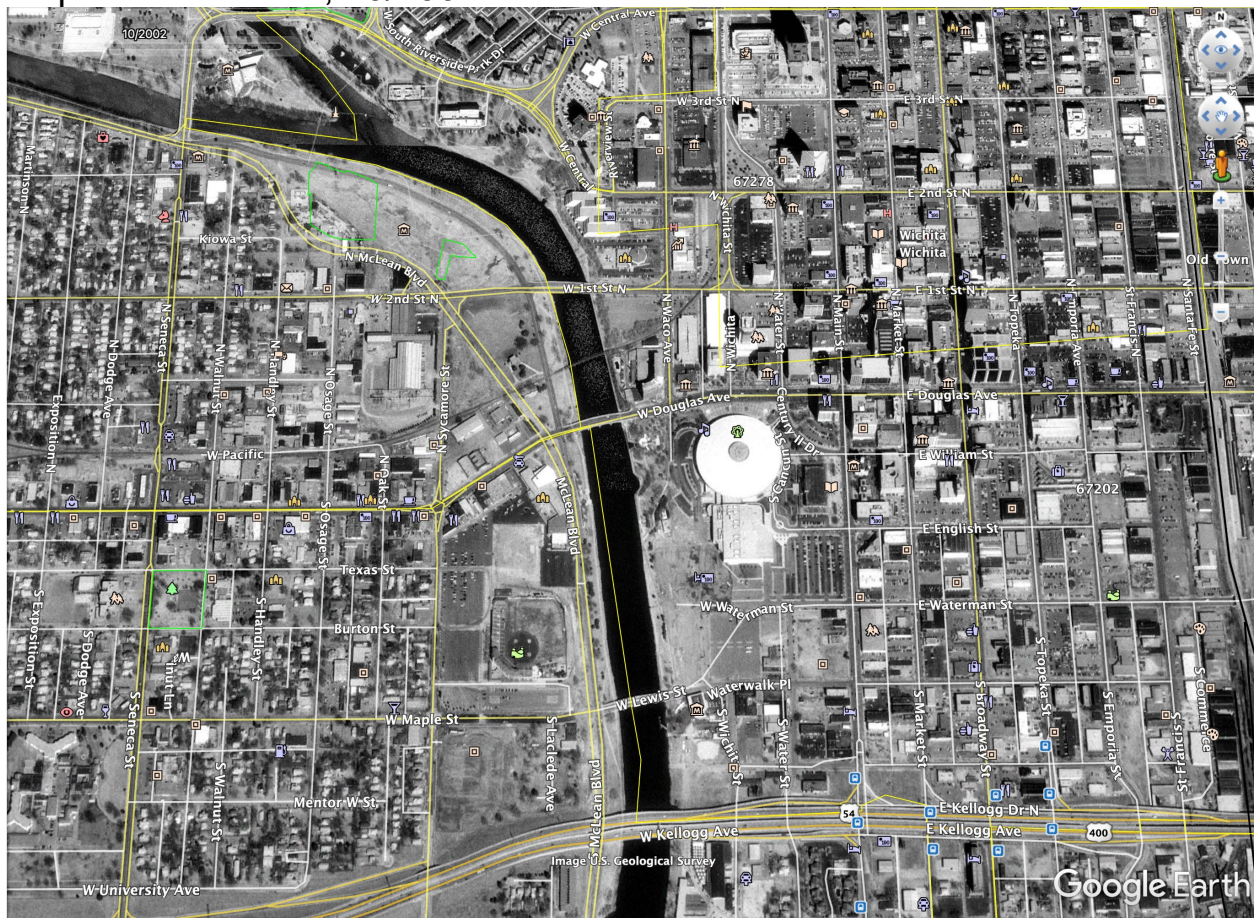
Map 20: Riverwalk, 3/1996



Source: U.S. Geological Survey, Retrieved from Google Earth.



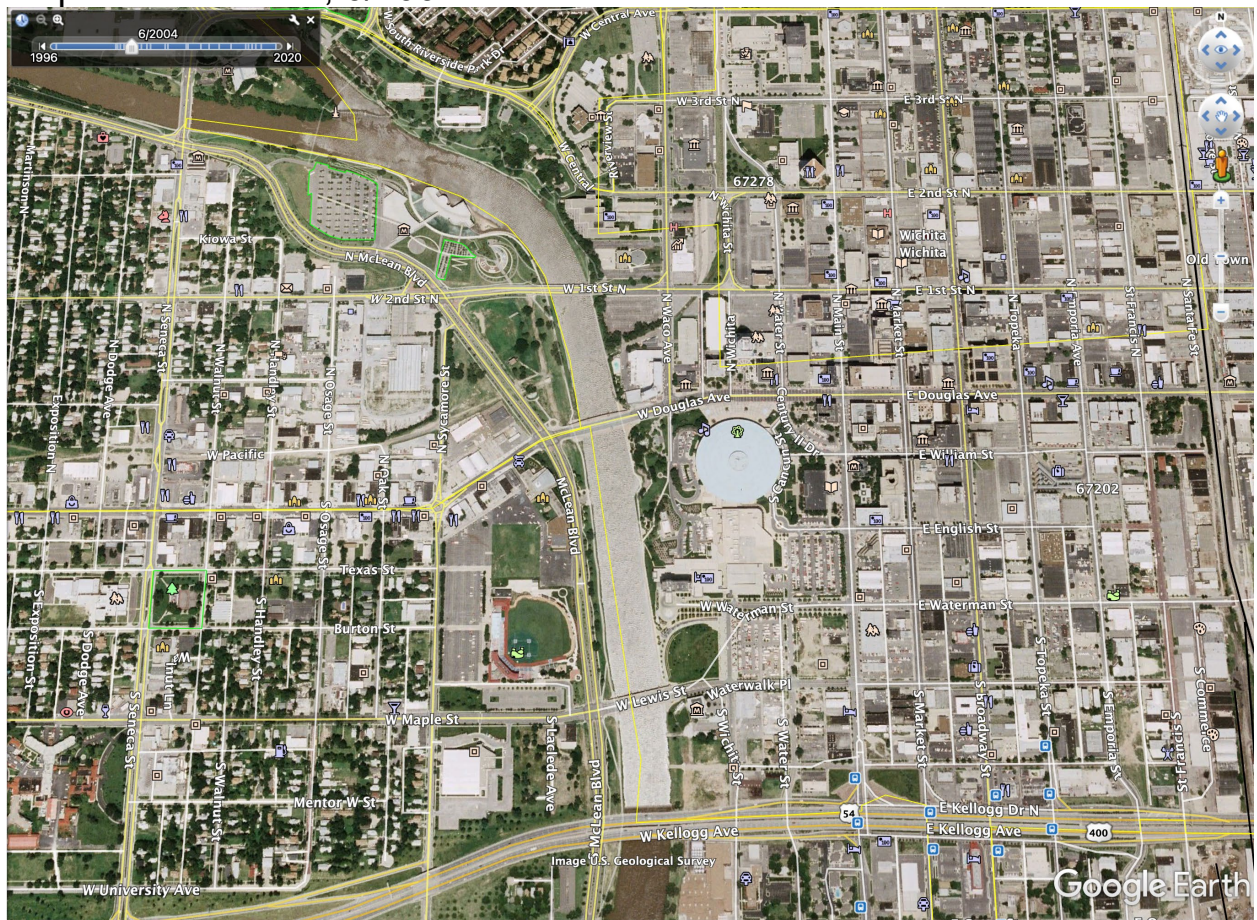
Map 21: Riverwalk, 10/2002



Source: U.S. Geological Survey, Retrieved from Google Earth.



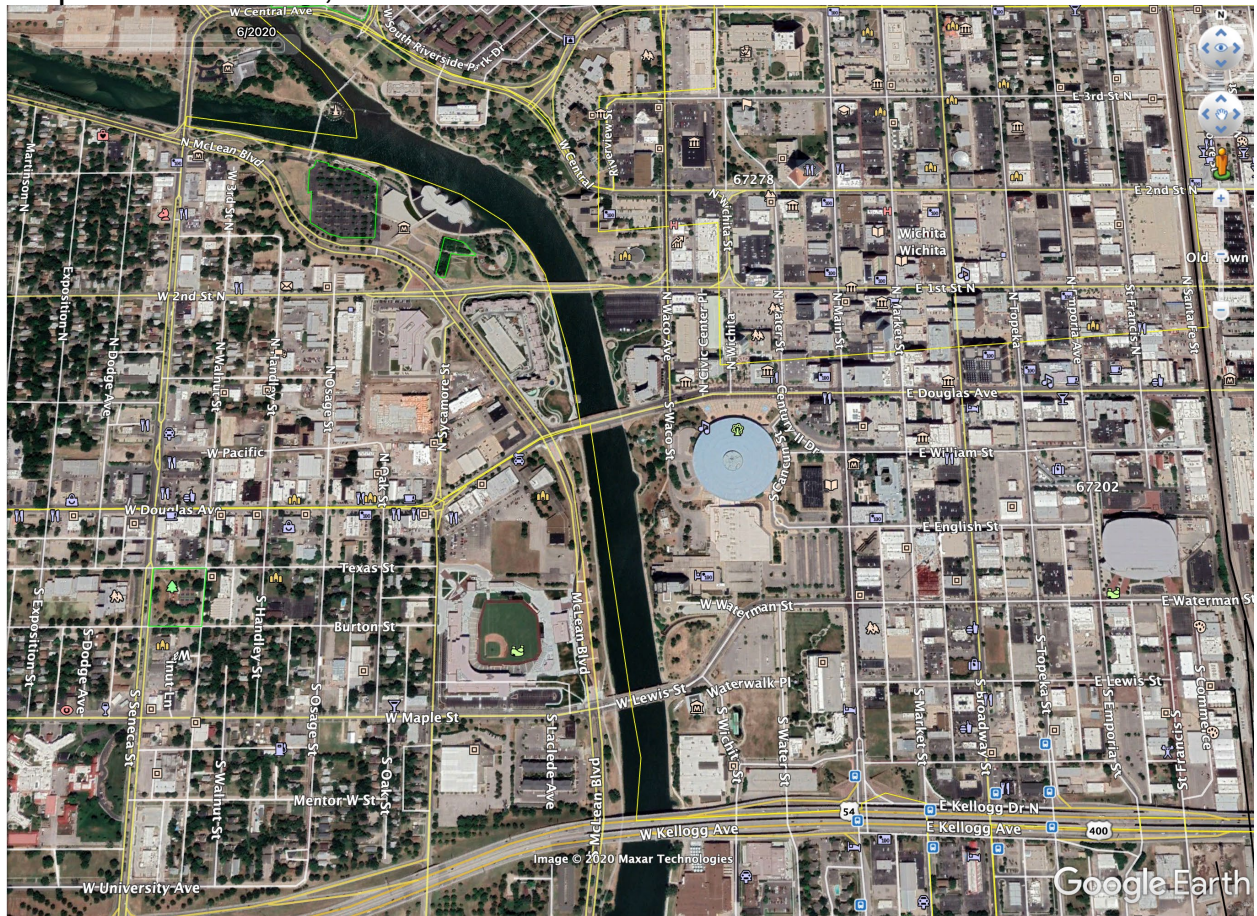
Map 22: Riverwalk, 6/2004



Source: U.S. Geological Survey, Retrieved from Google Earth



Map 23: Riverwalk, 6/2020



Source: Maxar Technologies, Retrieved from Google Earth.

East Bank adjacent area commercial building permits 2012 – 2019 equals \$16,221,143<sup>7</sup>.

<sup>7</sup> Source: Permits Issued by Map No Mark Elder East Bank COMM New and Rem.xlsx



Source: U.S. Geological Survey, Retrieved from Google Earth.



Map 25: Riverfront Stadium, 12/2002



Source: Maxar Technologies, Retrieved from Google Earth.



Map 26: Riverfront Stadium, 6/2020



Source: Maxar Technologies, Retrieved from Google Earth.

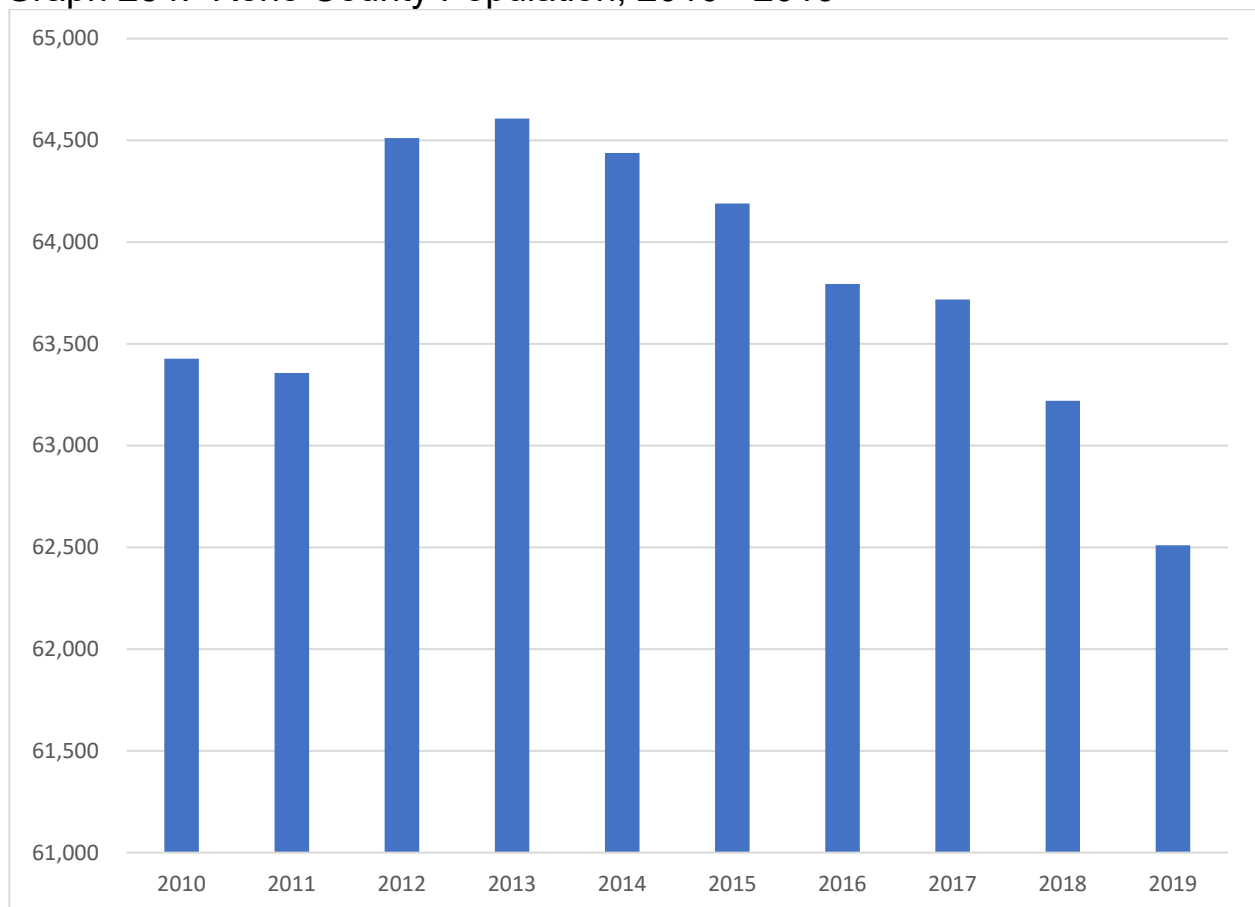
## Wichita Findings

- STAR Bond issuings in Wichita are Riverwalk Phase 1 (2007), Riverwalk Phase 2 (2014), K-96/Greenwich (2013), and Lawrence Dumont Stadium area (2016).
- There is strong evidence from the commercial and residential building permit data that the K96 and Greenwich STAR Bond district had significant economic impact both within and adjacent to its boundaries.
- Within the Riverwalk East STAR Bond district most of the building permits were for remodeling while outside the district most of the permits were for new construction. Once again, the spillover effects that arise from a STAR Bond project can be seen in the surrounding area.
- The maps of a project area over time show the development that has occurred both within the STAR Bond district and in the areas adjacent to the district. They also give a sense of the time it takes for development to spread out from the initial project.
- The Riverwalk STAR Bond projects show the limitations of siting projects in an already developed urban area. For instance, the existence of existing hotels and motels tended to suppress growth in this sector in and around the STAR Bond projects in Wichita.

## Hutchinson

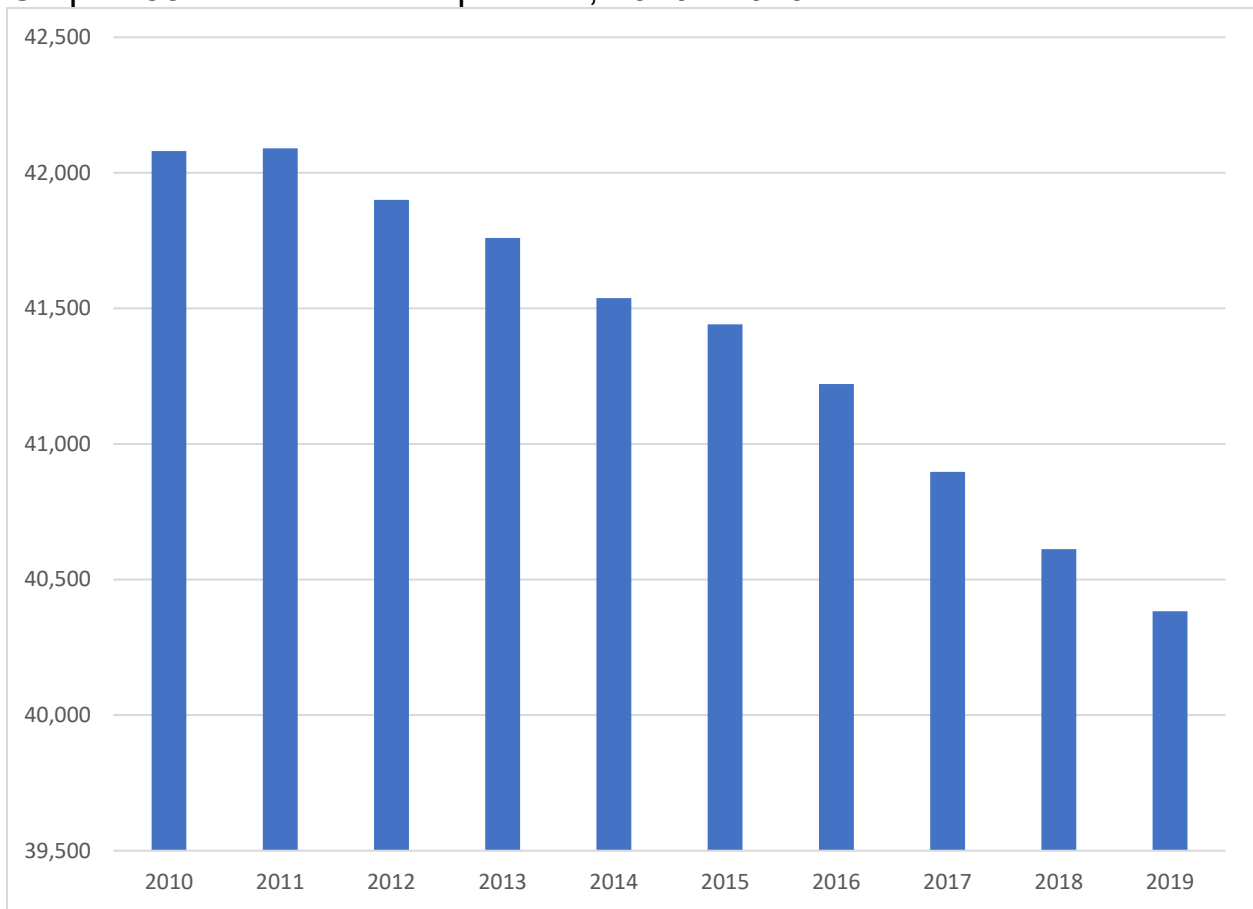
The Kansas Underground Salt Mine (now Strataca) was the STAR Bond issue in Hutchinson in 2006, and has since been fully paid. Our approach is to look at the larger context and then focus on the specific STAR Bond project. Because people are the major economic agents, either as producers of goods and services or as consumers of them we consider population first. Graphs 254 and 255 show the estimated population for Reno County and Hutchinson for the last decade. Both areas show overall decline in the estimated population with Reno County reaching its peak in 2013, while the peak before decline in Hutchinson was in 2011.

Graph 254: Reno County Population, 2010 - 2019



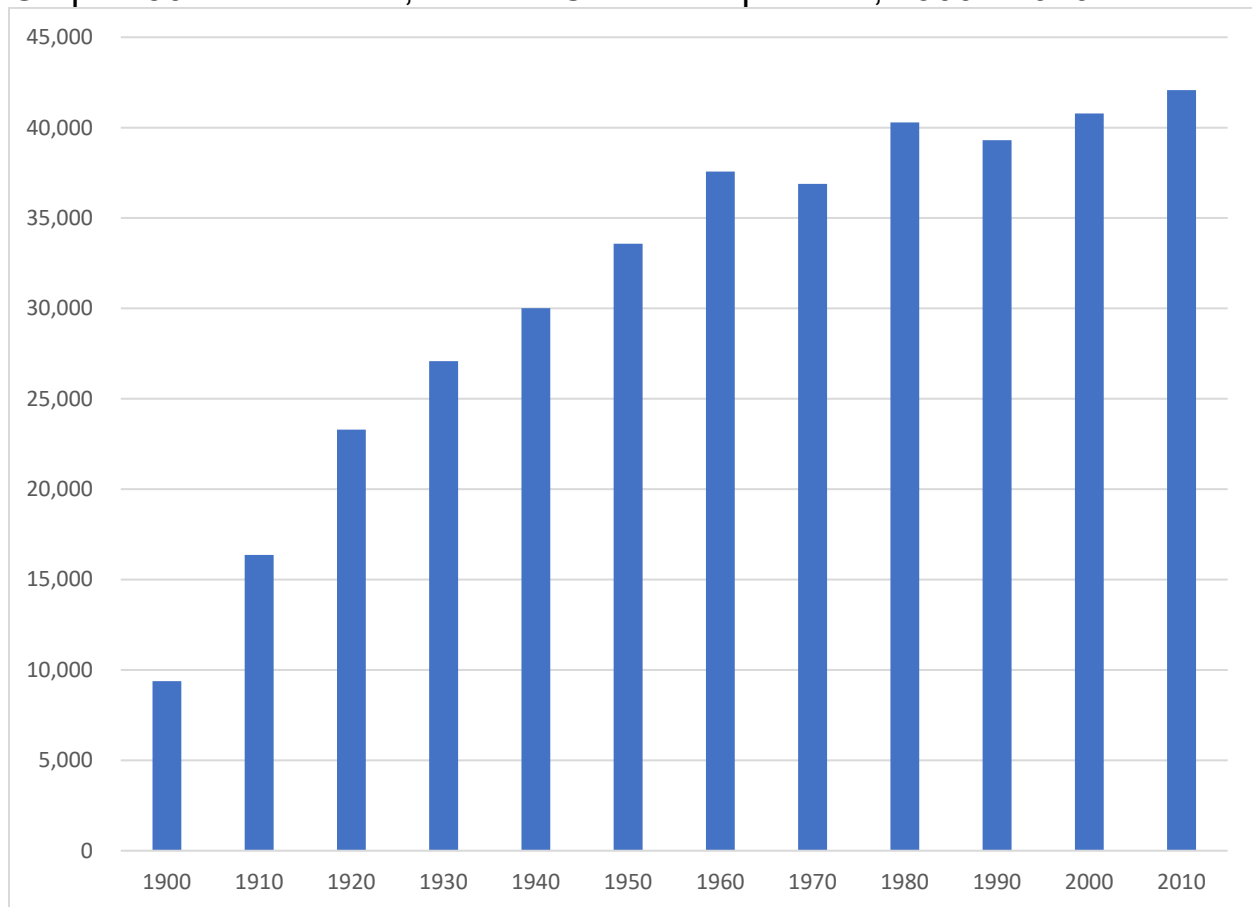
Source: U.S. Census Bureau

Graph 255: Hutchinson Population, 2010 - 2019



Source: U.S. Census Bureau

Graph 256: Hutchinson, Kansas Census Population, 1900 - 2010

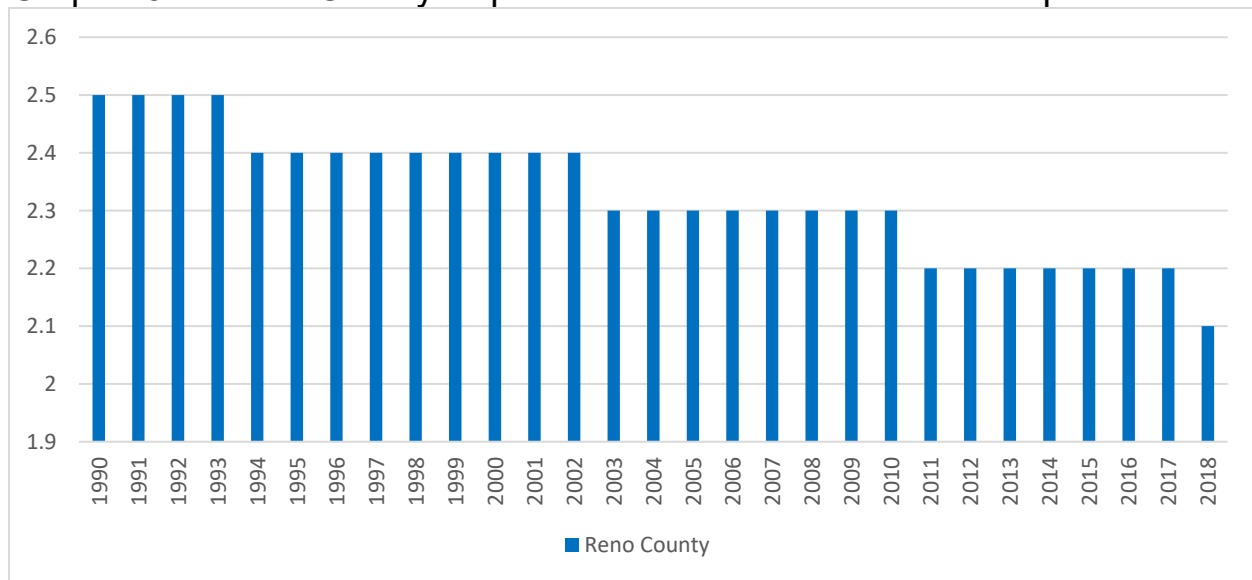


Source: U.S. Census Bureau, Decennial Census, 1990 – 2010

Graph 256 shows that the population of Hutchinson has generally grown, despite a couple of small dips, since 1900. People have been attracted to the city because of economic opportunities throughout the last century.



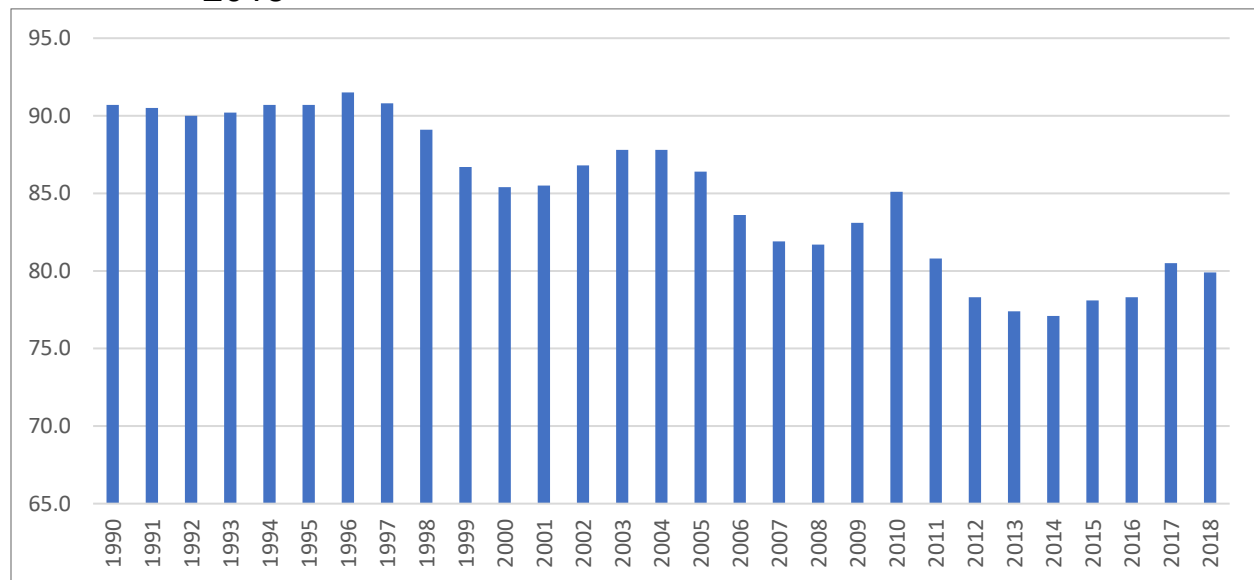
Graph 257: Reno County Population as Percent of Kansas Population



Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

Graph 257 provides a historical view of Reno County's estimated population since 1990 as a percentage of the Kansas population. Reno County's population has decreased from less than 2.5 percent to 2.1 percent of the Kansas population over this time frame.

Graph 258: Per Capita Income, Reno County as Percent of Kansas, 1990 – 2018



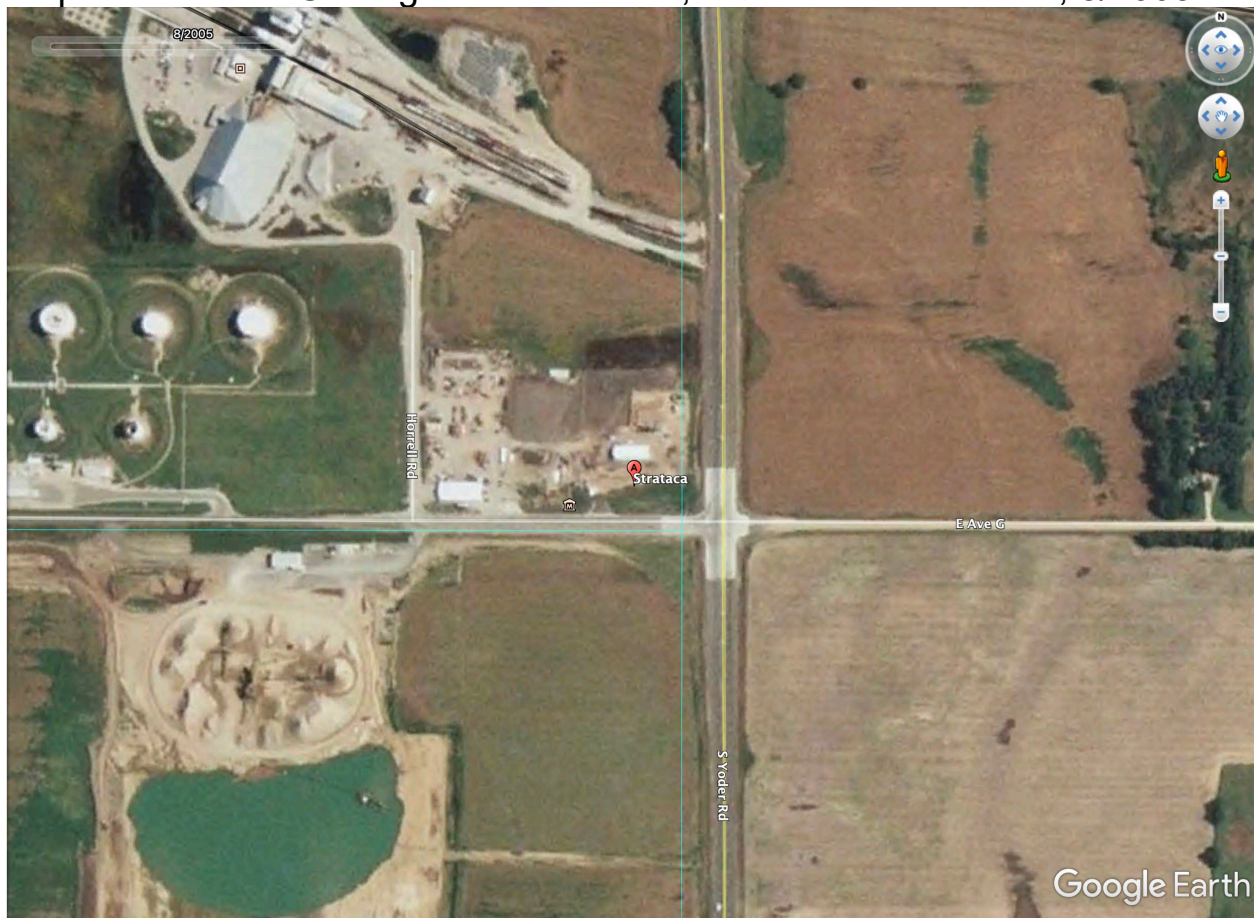
Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

Graph 258 shows that the per capita income in Reno County is generally lower than the per capita income in Kansas. Over this time period it has declined from about 90 percent to 80 percent with a dip down to 77 percent.

### Hutchinson STAR Bond Project Districts

Maps 27 and 28 show the boundaries the two districts of the Kansas Underground Salt Museum STAR Bond project that was undertaken by the City of Hutchinson. The Kansas Underground Salt Museum (KUSM), now named Strataca, was the first STAR Bond project that had two districts. The KUSM was located in an industrial area, with a second district located with hotels, restaurants, and retail. These STAR Bonds were paid off in less than nine years.

Map 27: Kansas Underground Salt Mine, STAR Bond District B, 8/2005



Source: Google Earth

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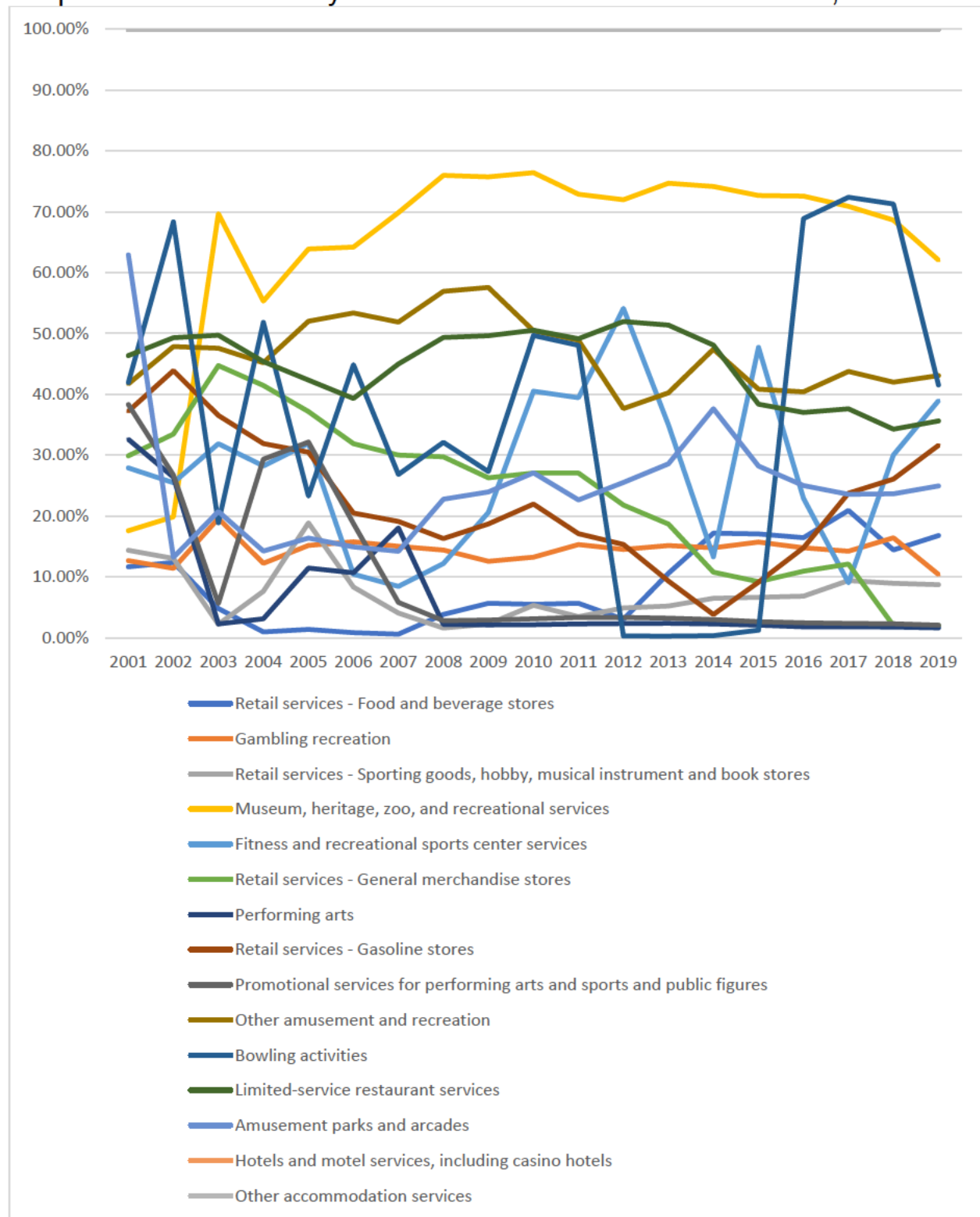
## Reno County Visitor Regional Supply Coefficients

Tables 27 through 29 show the Visitor Regional Supply Coefficients (Visitor RSCs) for 2001. This county level data is derived from the Implan economic modelling software and data. As might be expected visitors are the largest consumers of hotels and motel services and other accommodation services. For most of the years from 2007, museum, heritage, zoo, and recreational services have a visitor RSC greater than 70 percent. Given the other attractions in Hutchinson (Cosmosphere, State Fair, et cetera) other traveler services, such as gasoline stores and limited service restaurants are also popular. Visitor RSC values through time are shown in Graphs 137 through 139. Finally, Table 30 provides the Visitor RSC values for both 2001 and 2019.

The major observation from Graph 259 is that hotels, motels, and other accommodations continue to have a visitor RSC that is close to 100 percent. Please note, the values for “hotels, motels, including casino hotels” shown in graph 259 are almost identical to “other accommodation services.” They overlap each other. The percentages for all categories are found in table 32. It is also apparent that visitors from outside Reno County who come to Strataca may want to visit some of the other museums and attractions that Hutchinson has to offer and so may extend their stay.



Graph 259: Reno County Visitor RSC Greater Than 10 Percent, 2001



Source: Data from Implan, calculations by the author.

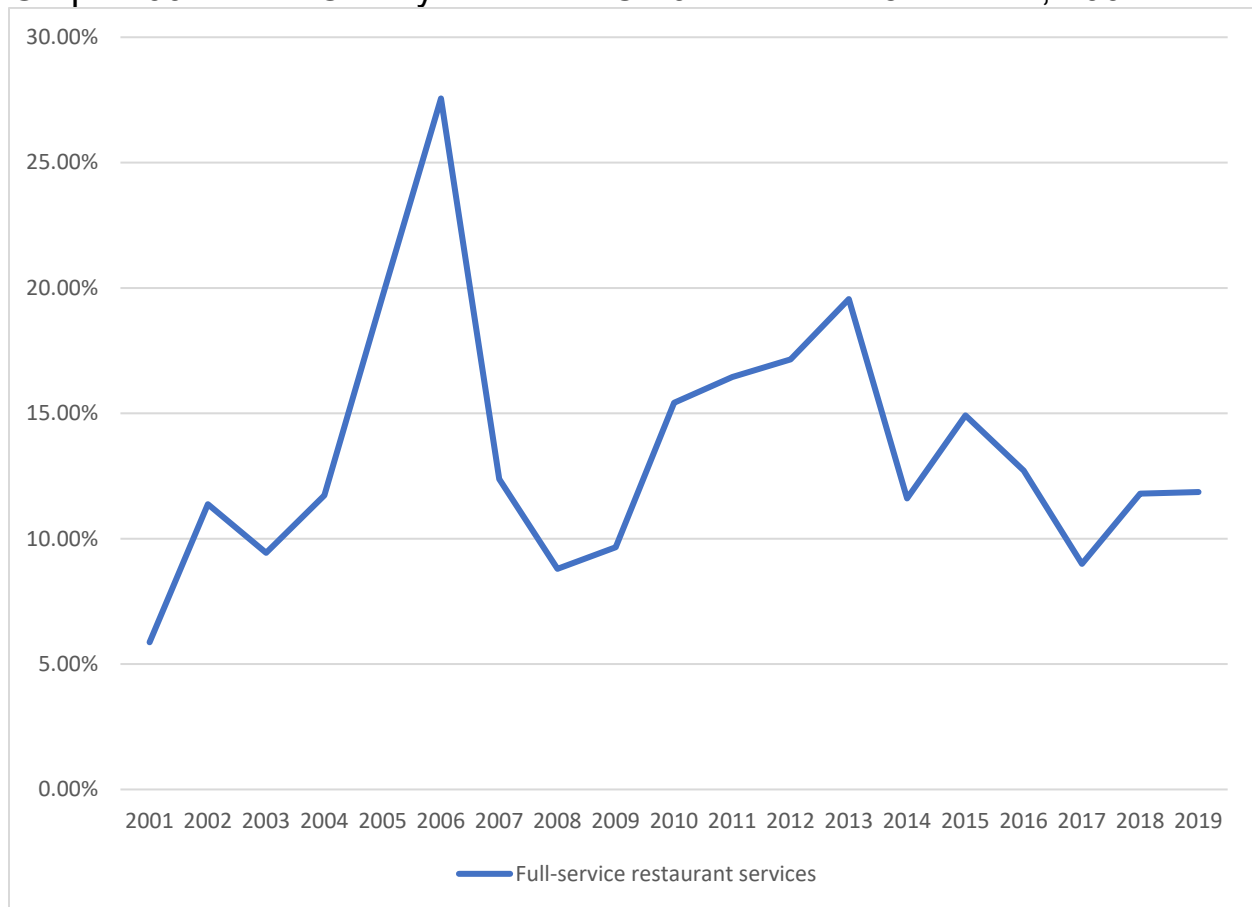
Table 32: Reno County Visitor RSCs, 2001

Description	Visitors' RSC
Retail services - Food and beverage stores	11.65%
Gambling recreation	12.65%
Retail services - Sporting goods, hobby, musical instrument and book stores	14.36%
Museum, heritage, zoo, and recreational services	17.58%
Fitness and recreational sports center services	27.89%
Retail services - General merchandise stores	29.89%
Performing arts	32.59%
Retail services - Gasoline stores	37.22%
Promotional services for performing arts and sports and public figures	38.30%
Other amusement and recreation	41.71%
Bowling activities	41.94%
Limited-service restaurant services	46.35%
Amusement parks and arcades	62.89%
Hotels and motel services, including casino hotels	99.97%
Other accommodation services	99.97%

Source: Data from Implan, calculations by the author.

Graph 260 shows that only full service restaurants were in the group with visitor RSCs between 10 percent and 5 percent.

Graph 260: Reno County Visitor RSC 10 Percent to 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Table 33: Reno County Visitor RSCs, 2001

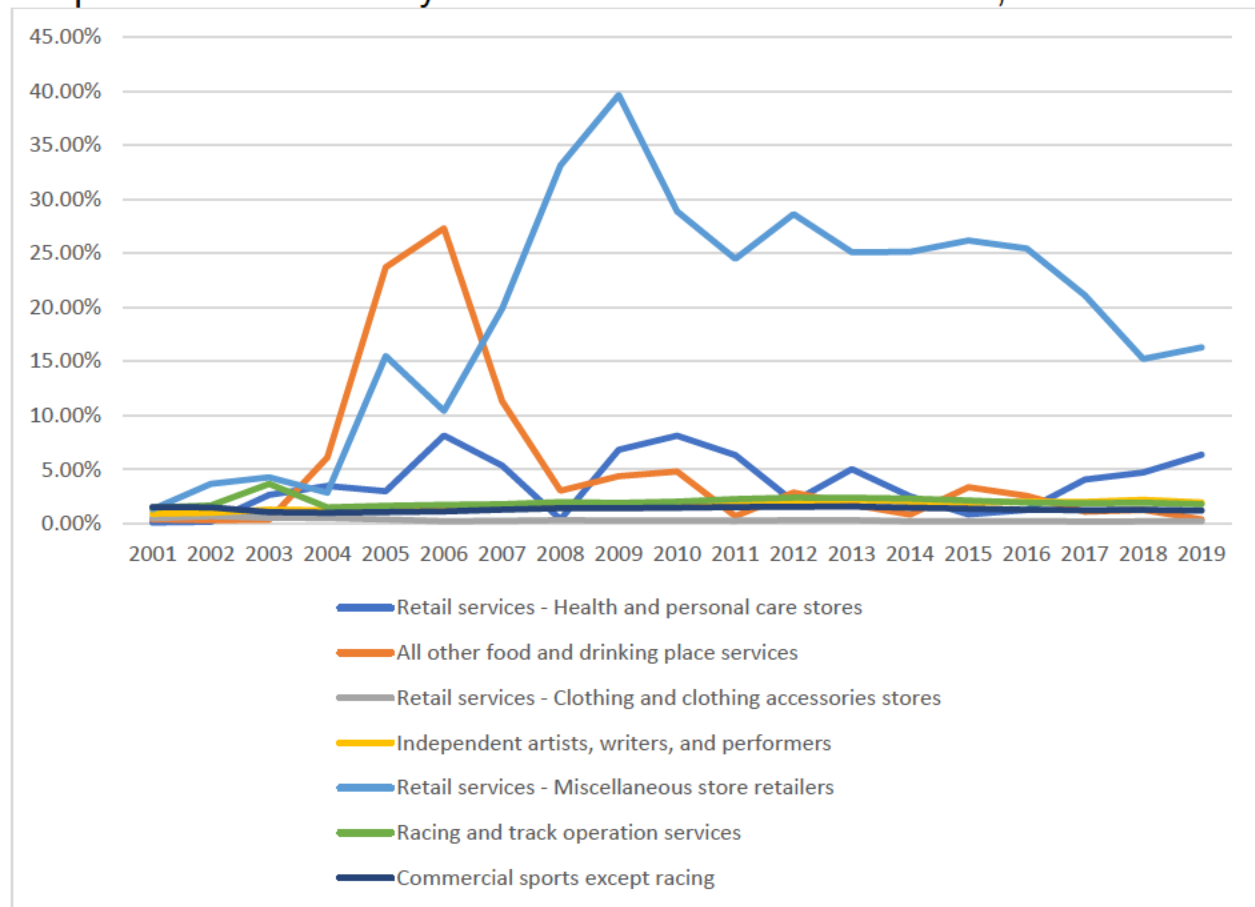
Description	Visitors' RSC
Full-service restaurant services	5.87%

Source: Data from Implan, calculations by the author.

Graph 261 shows that for Reno County the sectors that had visitor RSCs that were less than 5 percent tended to rely on local customers. Miscellaneous store retailers were the only group that consistently attracted visitors as customers.



Graph 261: Reno County Visitor RSC Less Than 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Table 34: Reno County Visitor RSCs, 2001

Description	Visitors' RSC
Retail services - Health and personal care stores	0.09%
All other food and drinking place services	0.37%
Retail services - Clothing and clothing accessories stores	0.48%
Independent artists, writers, and performers	0.90%
Retail services - Miscellaneous store retailers	1.31%
Racing and track operation services	1.46%
Commercial sports except racing	1.52%

Source: Data from Implan, calculations by the author.

Table 35: Reno County Visitor RSCs, 2001 and 2019

Description	2001	2019
Retail services - Health and personal care stores	0.09%	6.36%
All other food and drinking place services	0.37%	0.38%
Retail services - Clothing and clothing accessories stores	0.48%	0.20%
Independent artists, writers, and performers	0.90%	1.95%
Retail services - Miscellaneous store retailers	1.31%	16.29%
Racing and track operation services	1.46%	1.78%
Commercial sports except racing	1.52%	1.19%
Full-service restaurant services	5.87%	11.86%
Retail services - Food and beverage stores	11.65%	16.79%
Gambling recreation	12.65%	10.39%
Retail services - Sporting goods, hobby, musical instrument and book stores	14.36%	8.71%
Museum, heritage, zoo, and recreational services	17.58%	62.05%
Fitness and recreational sports center services	27.89%	38.93%
Retail services - General merchandise stores	29.89%	2.00%
Performing arts	32.59%	1.62%
Retail services - Gasoline stores	37.22%	31.60%
Promotional services for performing arts and sports and public figures	38.30%	2.06%
Other amusement and recreation	41.71%	43.06%
Bowling activities	41.94%	41.52%
Limited-service restaurant services	46.35%	35.62%
Amusement parks and arcades	62.89%	24.94%
Hotels and motel services, including casino hotels	99.97%	99.97%
Other accommodation services	99.97%	99.97%

Source: Data from Implan, calculations by the author.

## Reno County Tourism

The graphs in this section are based on data from annual publications of the Kansas Department of Wildlife, Parks, and Tourism and compare Reno County's

data with the State of Kansas. The annual growth rate allows direct comparison when there are large differences in the scale of the underlying data values. There is more volatility at the county level because the state level data encompasses all of the counties.

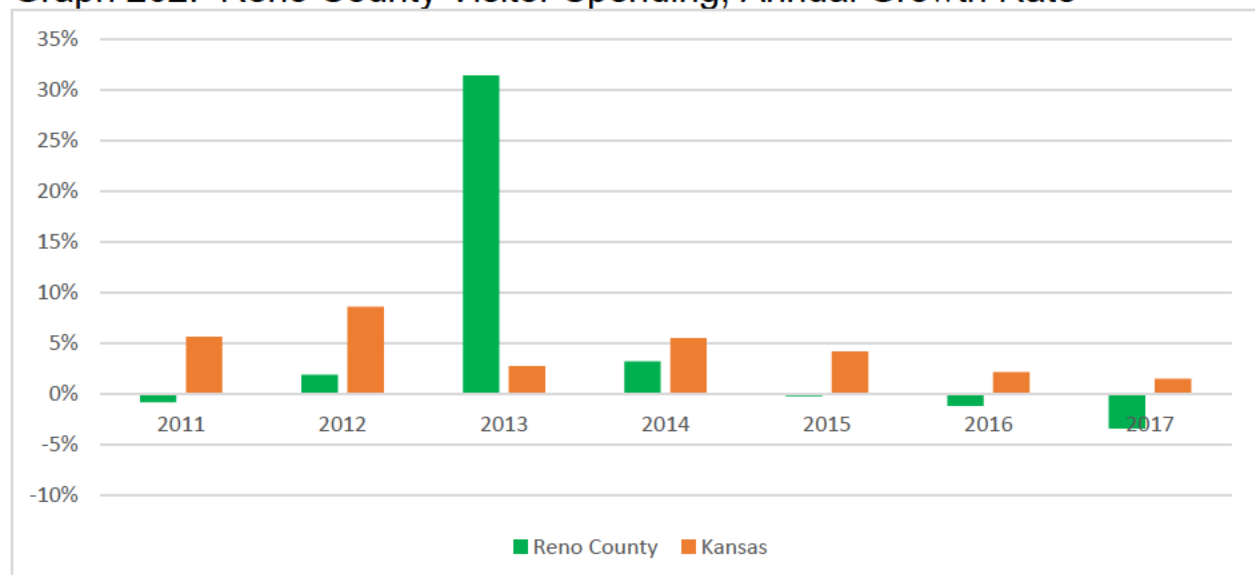
**Table 36: Tourism Employment, Reno County**

	2010	2011	2012	2013	2014	2015	2016	2017
Employment	1,278	1,279	1,320	1,635	1,645	1,633	1,609	1,600
Labor Income (000s)	28,841	28,961	30,514	37,064	37,820	38,363	39,215	39,629
Annual Income	\$22,567	\$22,645	\$23,124	\$22,675	\$22,985	\$23,491	\$24,368	\$24,769

Source: Kansas Department of Wildlife, Parks, and Tourism, Annual Reports

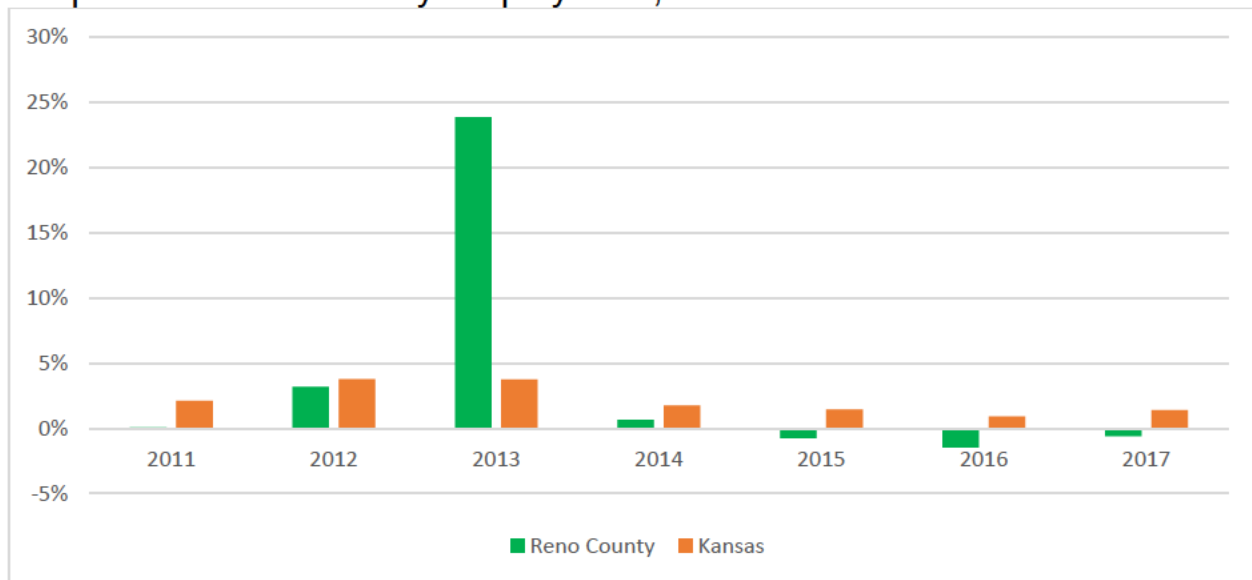
Table 36 shows that a 24 percent increase in tourism employment occurred in 2013. The employment increase was maintained through 2017. Graph 262 shows that there was also an increase in visitor spending during 2013. Graphs 263 through 265 provide a visual interpretation of the data in Table 36.

**Graph 262: Reno County Visitor Spending, Annual Growth Rate**



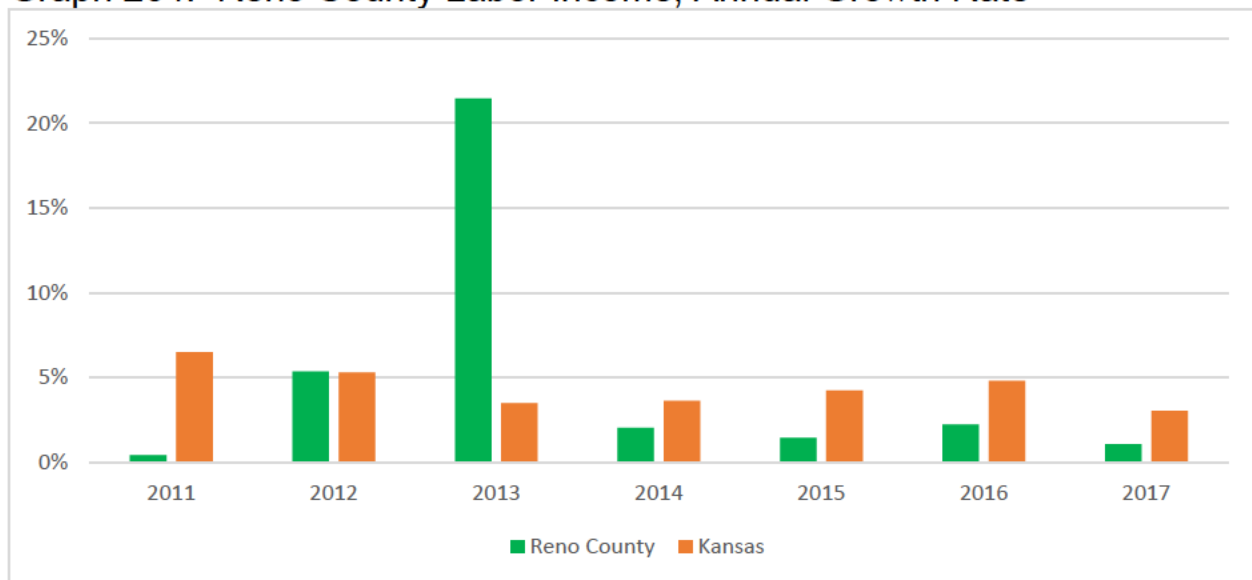
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 263: Reno County Employment, Annual Growth Rate



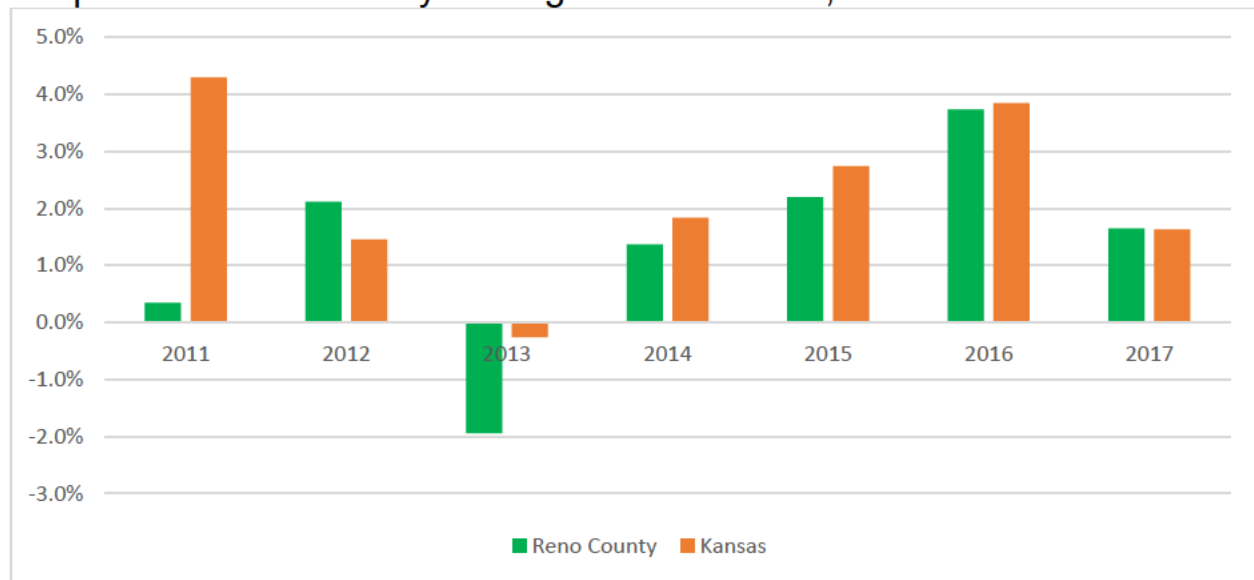
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 264: Reno County Labor Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

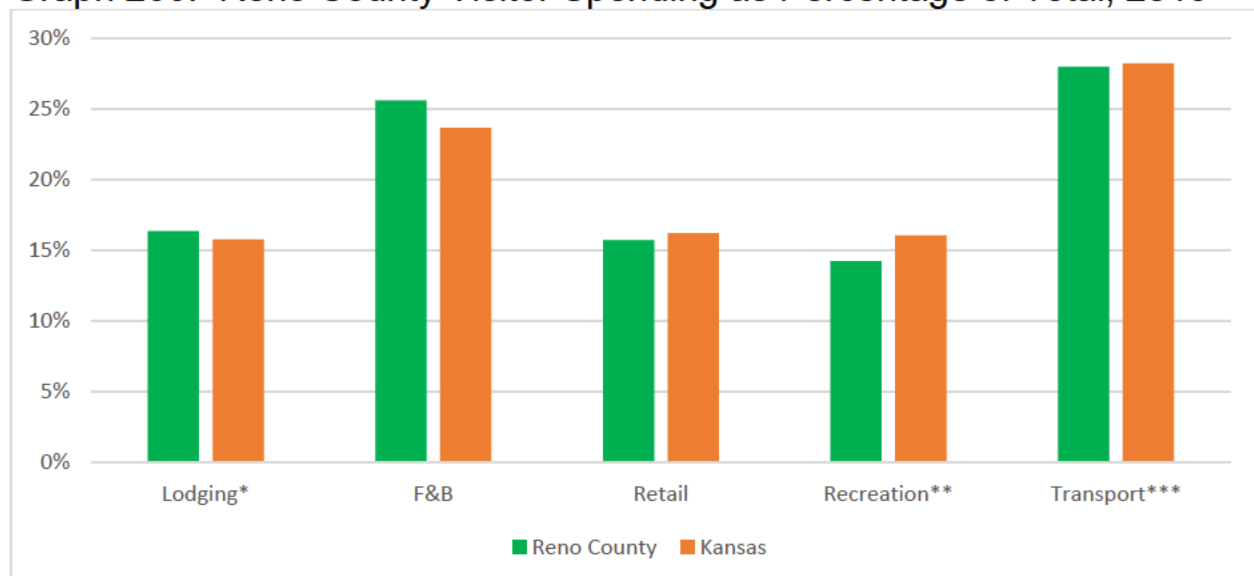
Graph 265: Reno County Average Labor Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

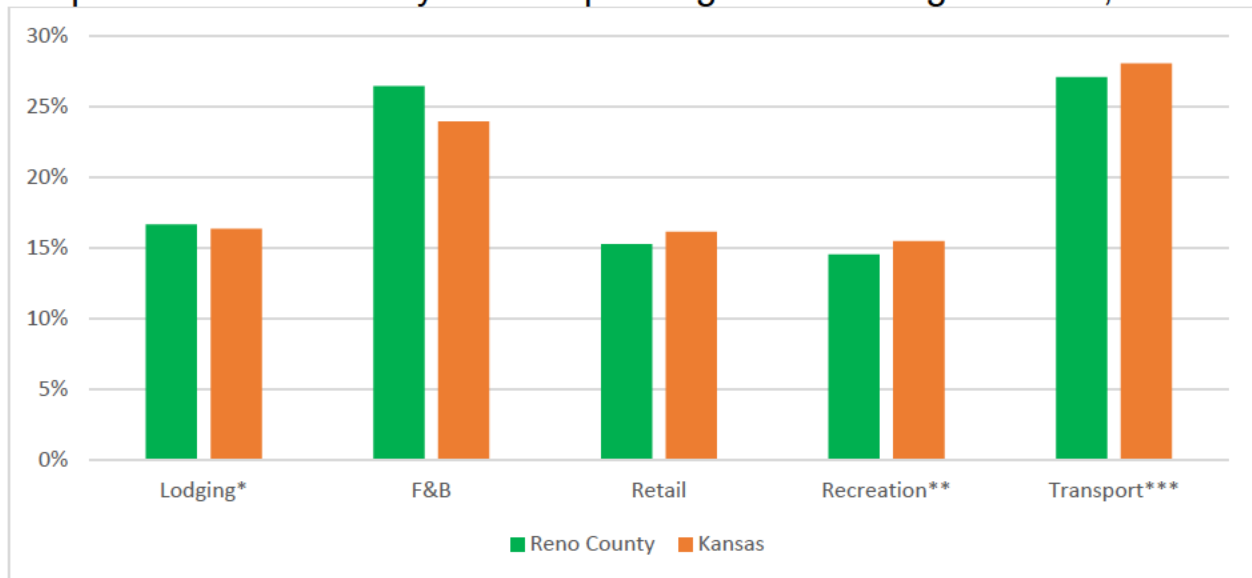
Graphs 266 through 268 show that visitor spending for food and beverage (F&B) is consistently above the Kansas percentage of total. Lodging is above the state level two of the three years presented in the graphs.

Graph 266: Reno County Visitor Spending as Percentage of Total, 2013



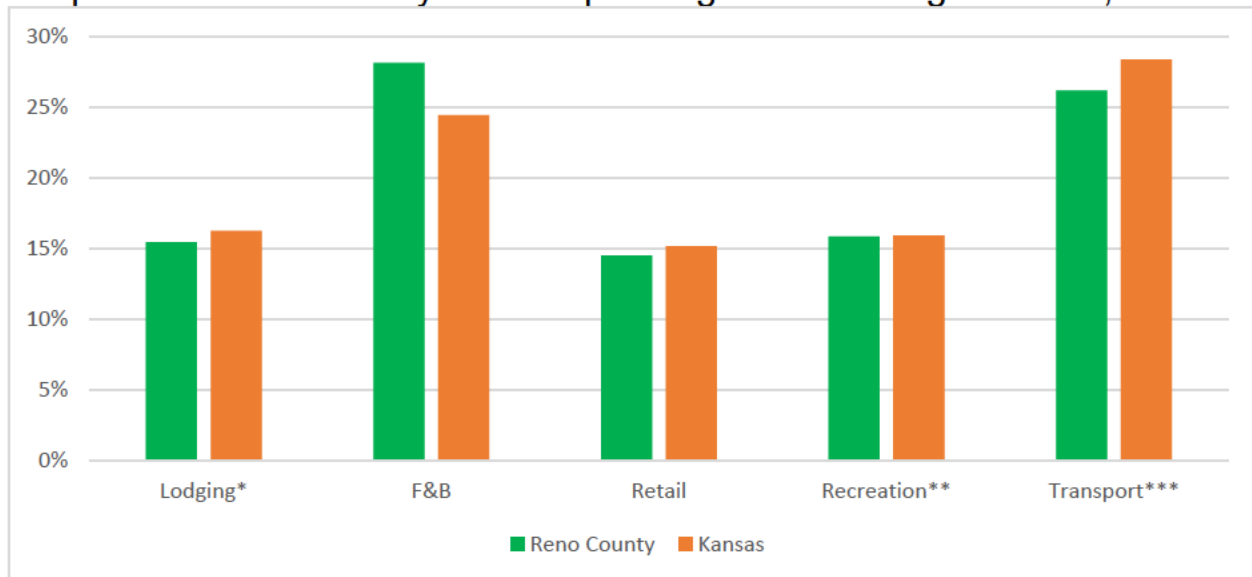
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 267: Reno County Visitor Spending as Percentage of Total, 2015



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

Graph 268: Reno County Visitor Spending as Percentage of Total, 2017



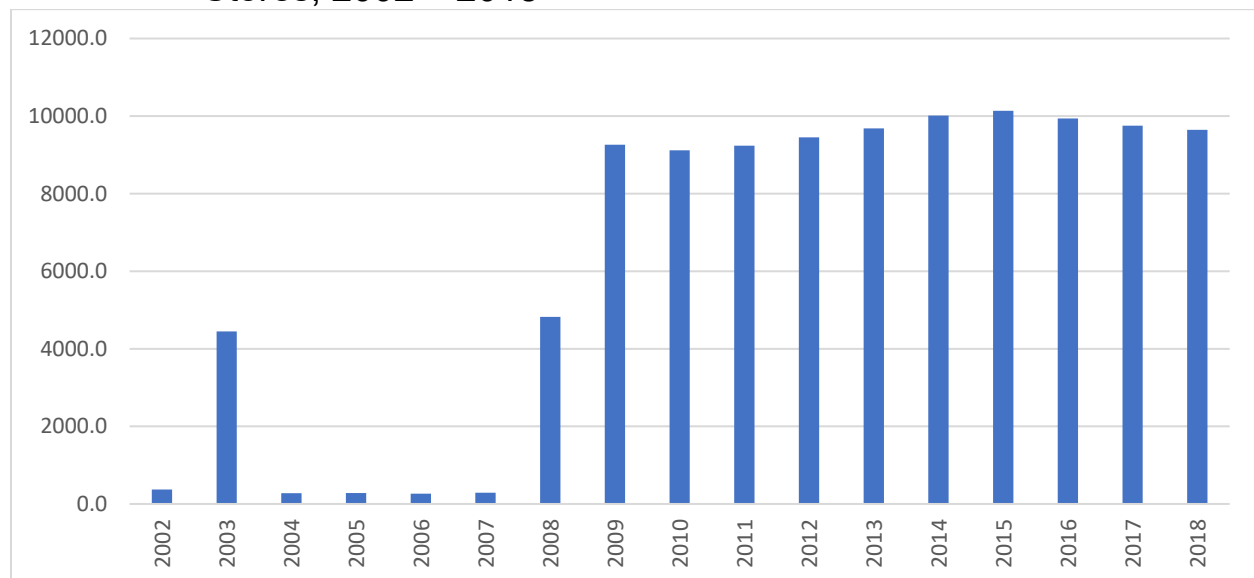
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculation by the author.

## Hutchinson Labor Data by NAICS and ZIP

The charts in this section show the average annual number of employees, average wage, and total wages by three digit NAICS code and ZIP code for all businesses within the code category that were doing business in ZIP 67501. The underlying data is collected by the Kansas Department of Labor on a monthly basis for each quarter of the year. We use the average data on an annual basis.

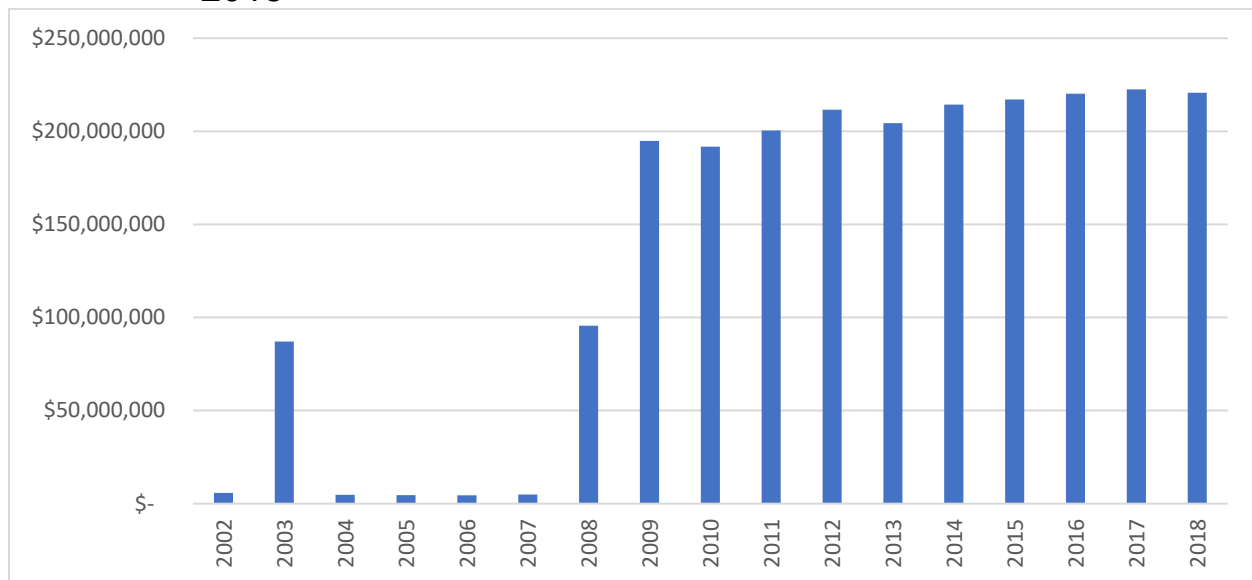
Graphs 269 through 271 and 275 through 277 are examples of the errors that can happen in data collection systems. The numbers (employees and wages) to the Department of Labor in these two sectors obviously are corporate numbers and not local numbers. Nonetheless, it is likely that the smaller numbers reported in each sector are local to ZIP 67501. Further, it is also likely that these numbers are stable over the entire period. We are leaving the graphs for completeness, with the caveat that the KWIK Shop and Dillons data is probably the cause of these anomalies.

**Graph 269: ZIP 67501, Average Number of Employees, Food & Beverage Stores, 2002 – 2018**



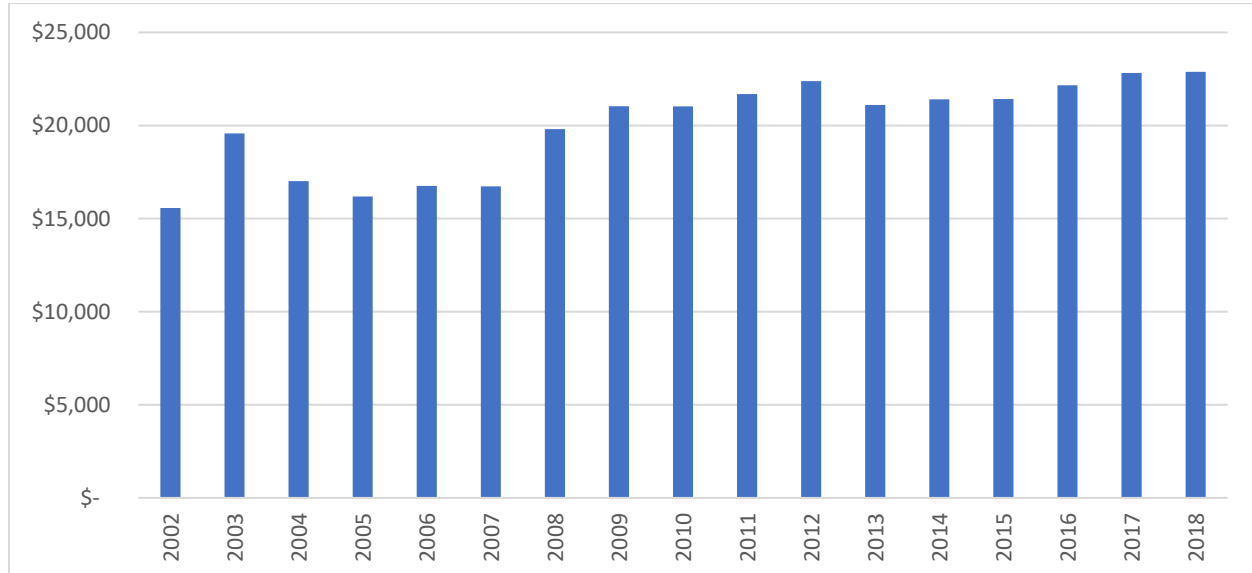
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 270: ZIP 67501, Total Wages, Food & Beverage Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 271: ZIP 67501, Average Wage, Food & Beverage Stores, 2002 – 2018**

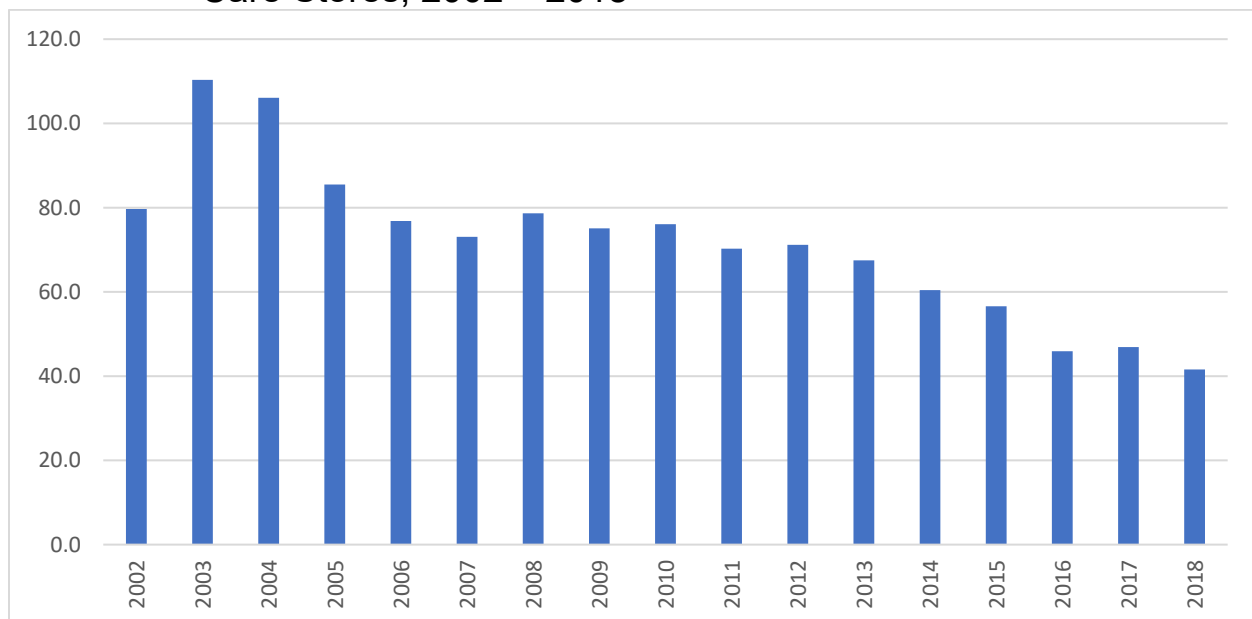


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute



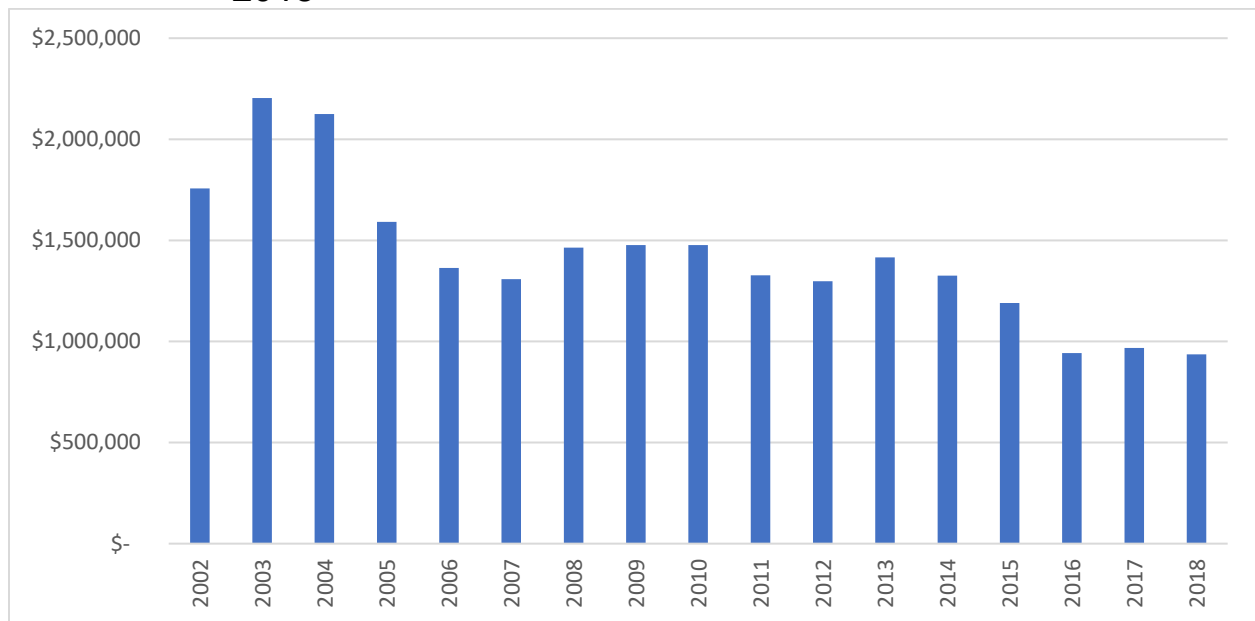
Graphs 272 through 274 show that the number of employees in health and personal care stores has declined (62 percent) rather steadily since 2003. Over the same time interval, total wages have declined by nearly 58 percent. The average wage has remained relatively unchanged.

Graph 272: ZIP 67501, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018



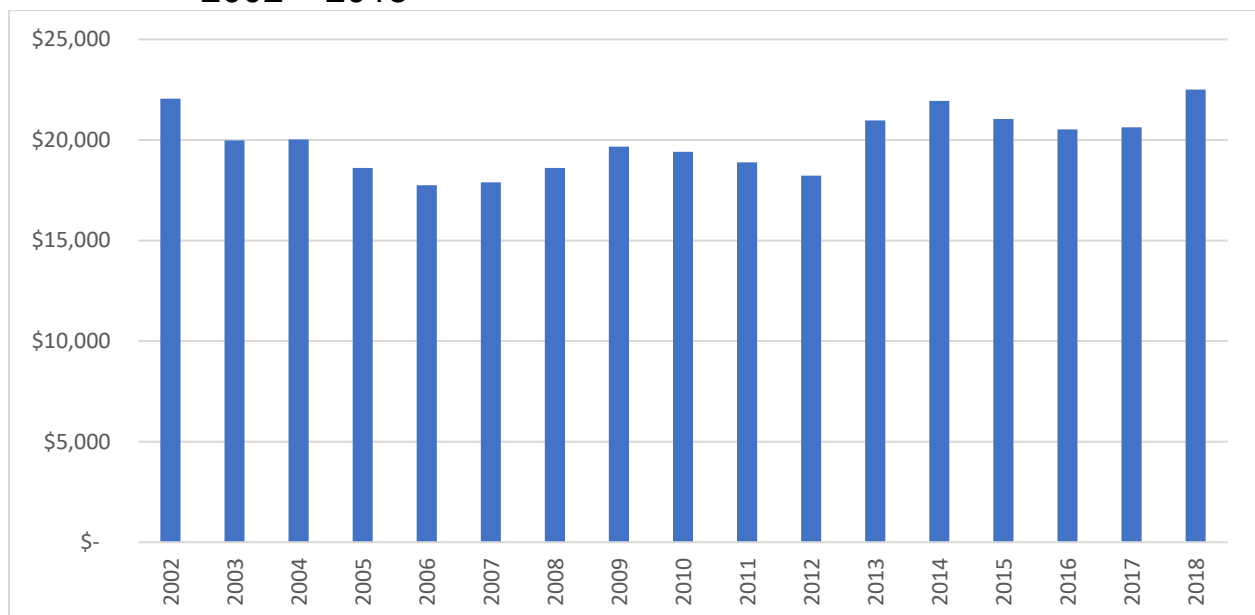
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 273: ZIP 67501, Total Wages, Health & Personal Care Stores, 2002 – 2018**



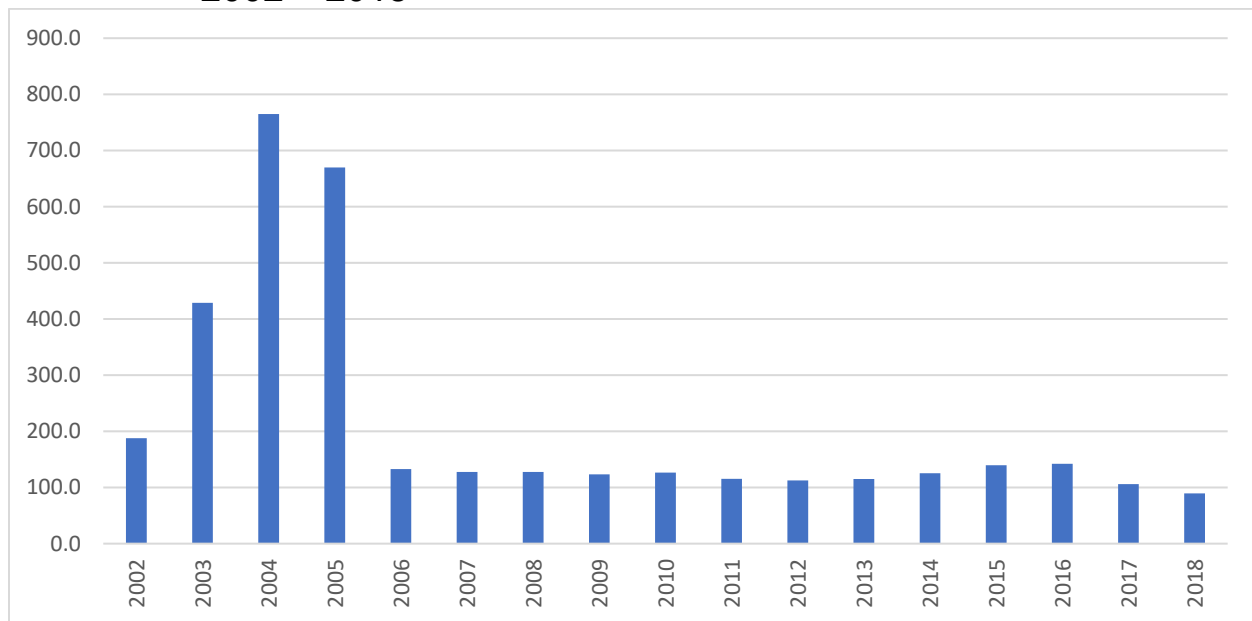
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 274: ZIP 67501, Average Wage, Health & Personal Care Stores, 2002 – 2018**



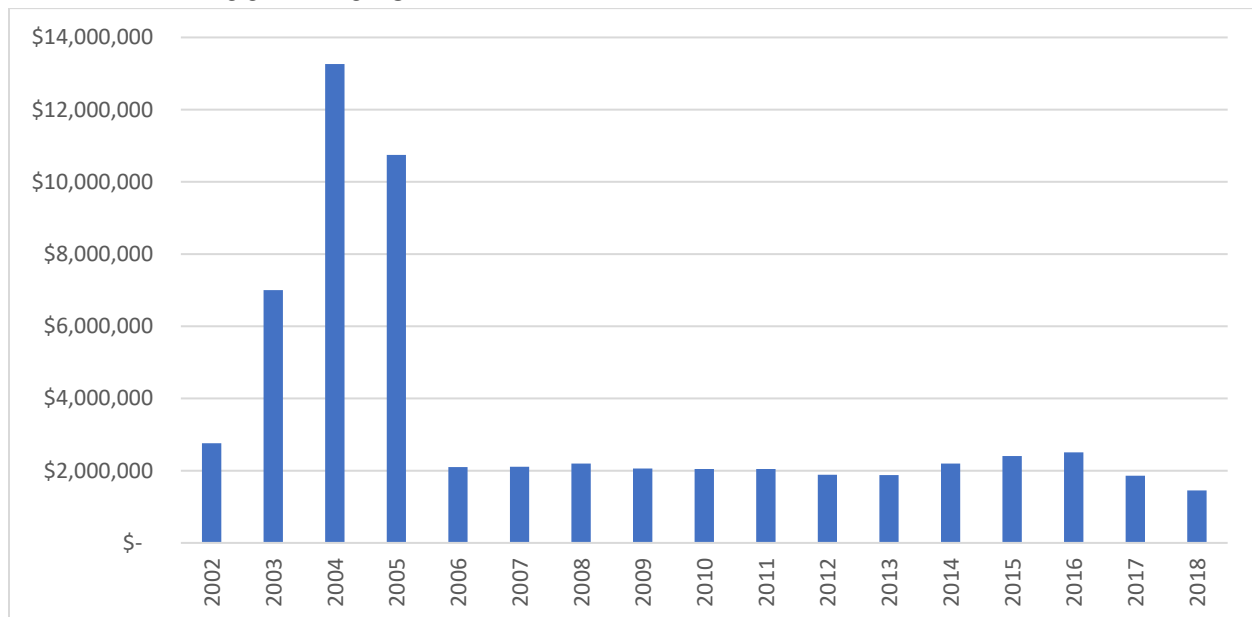
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 275: ZIP 67501, Average Number of Employees, Gasoline Stations, 2002 – 2018



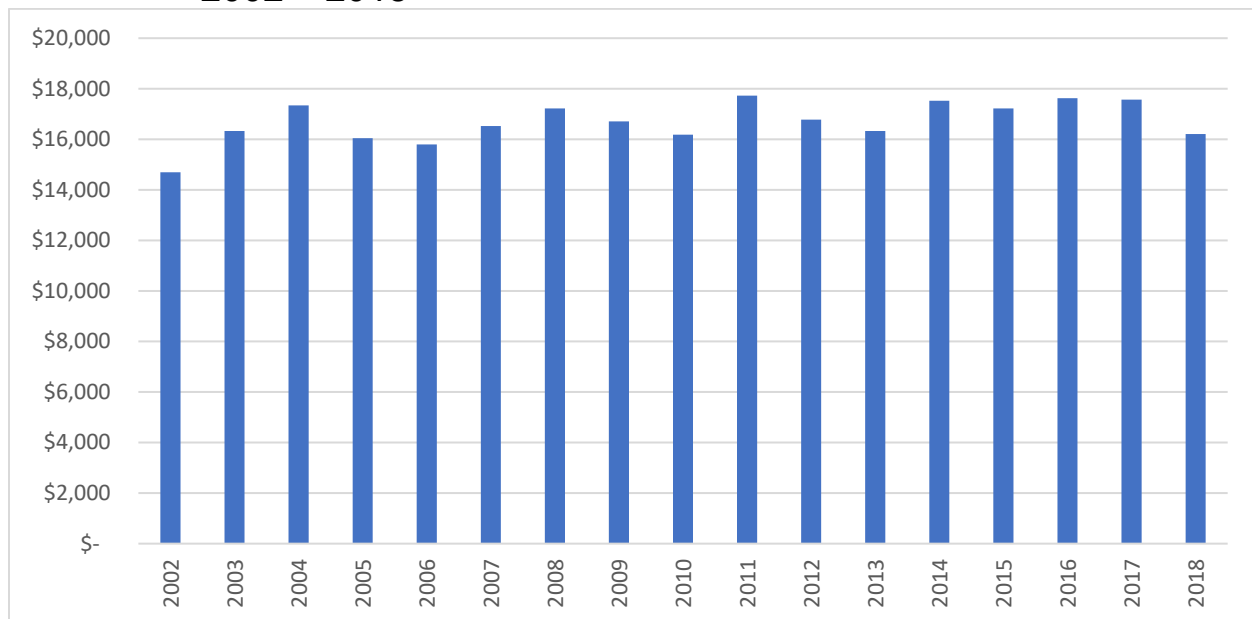
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 276: ZIP 67501, Average Number of Employees, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

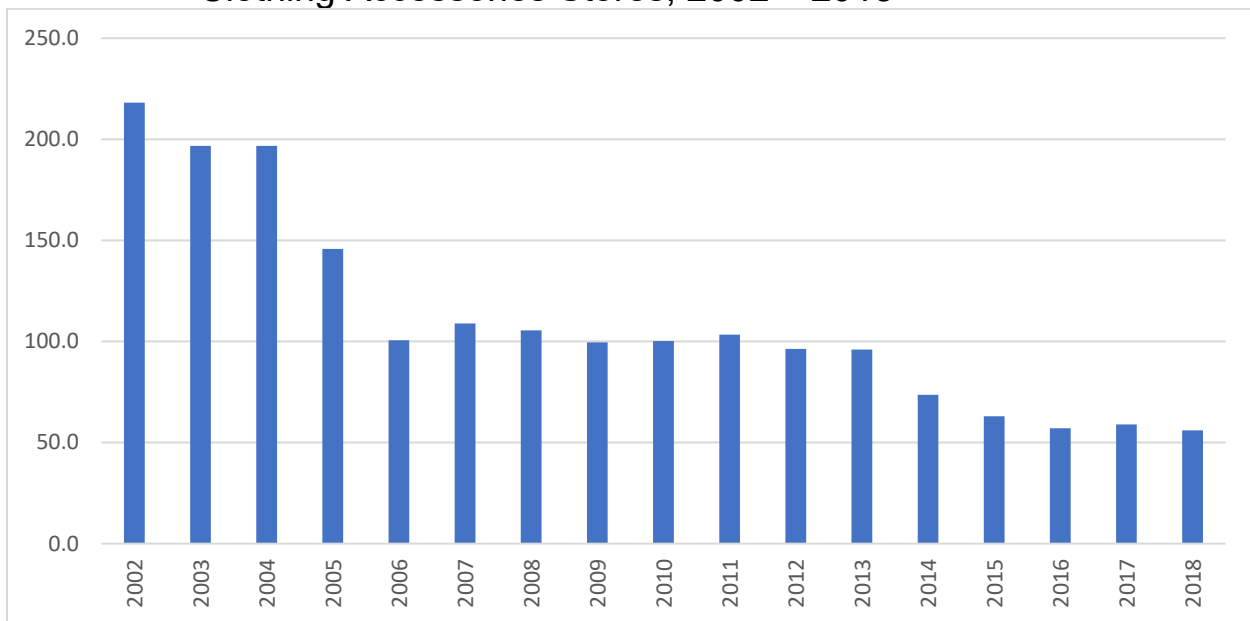
Graph 277: ZIP 67501, Average Number of Employees, Gasoline Stations, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

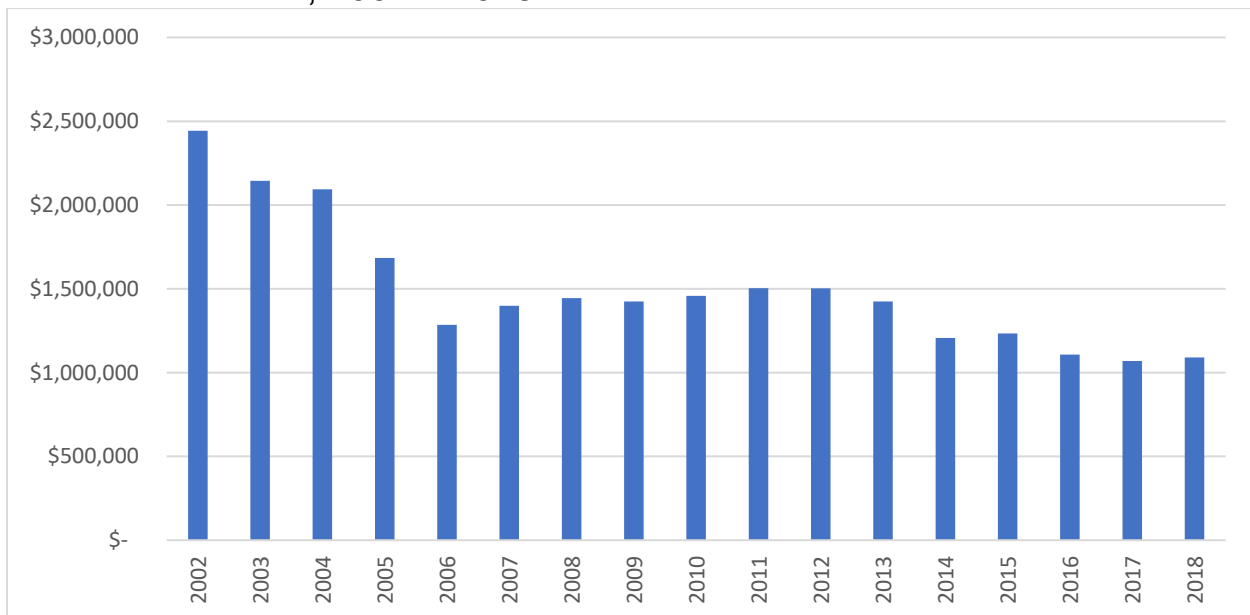
Graphs 278 through 280 show that the number of employees at clothing and clothing accessories stores in ZIP 67501 have decreased from more than 200 people in 2002 to slightly more than 50 people in 2018. The decline in total wages was less steep which led to an increase in average wage.

**Graph 278: ZIP 67501, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018**



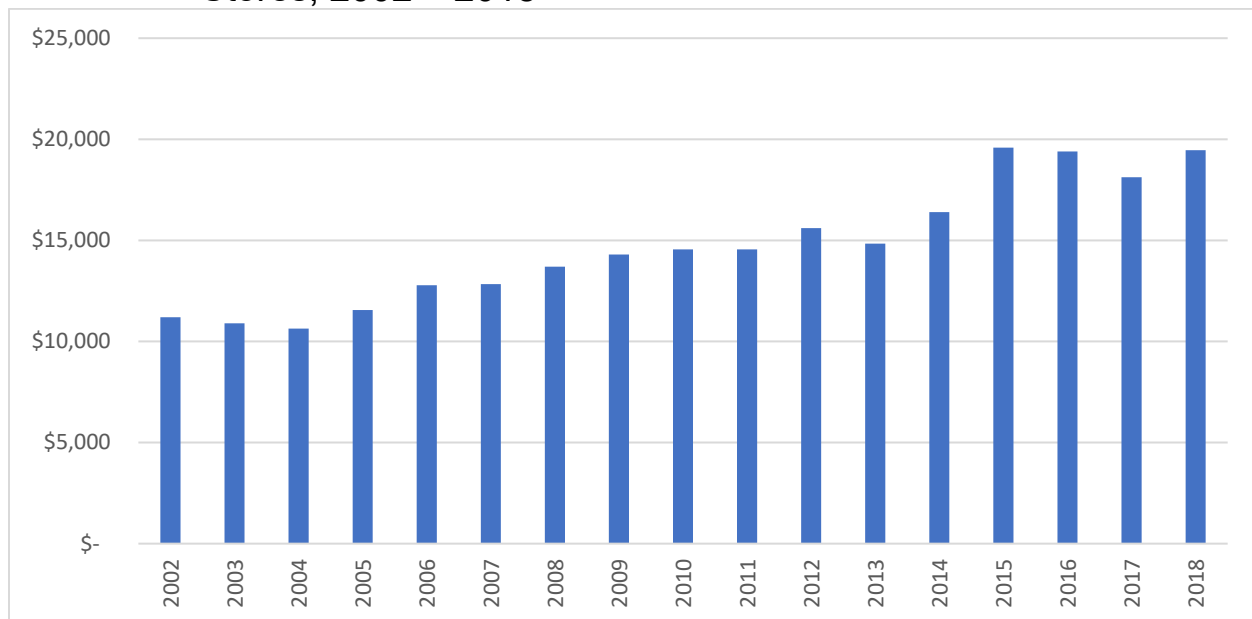
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 279: ZIP 67501, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

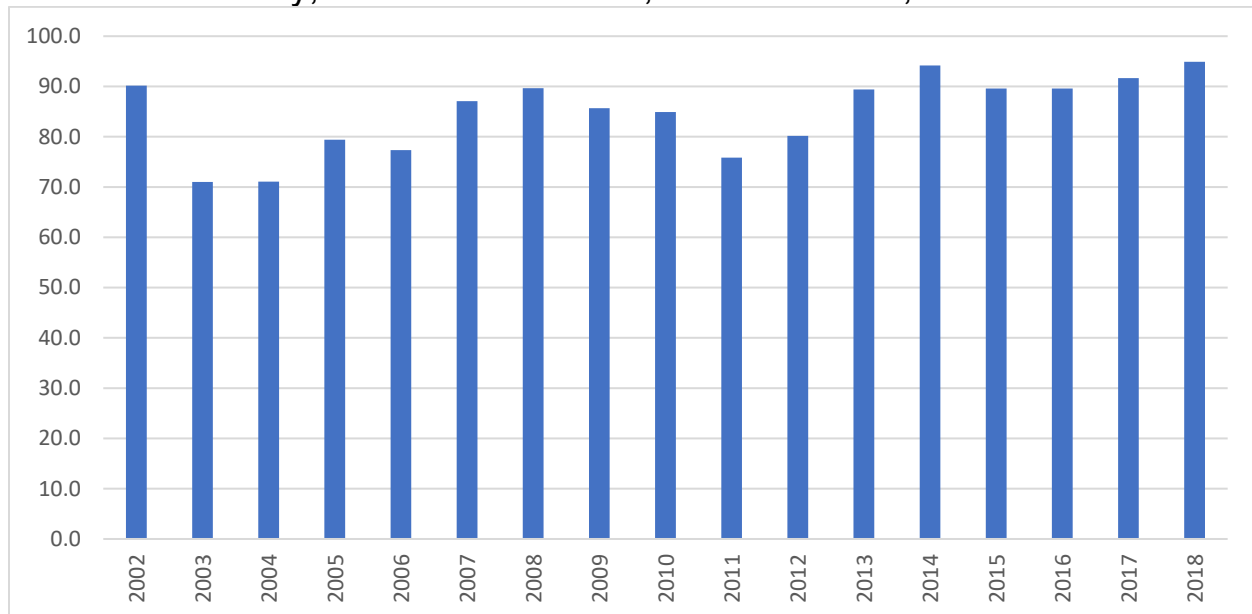
Graph 280: ZIP 67501, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

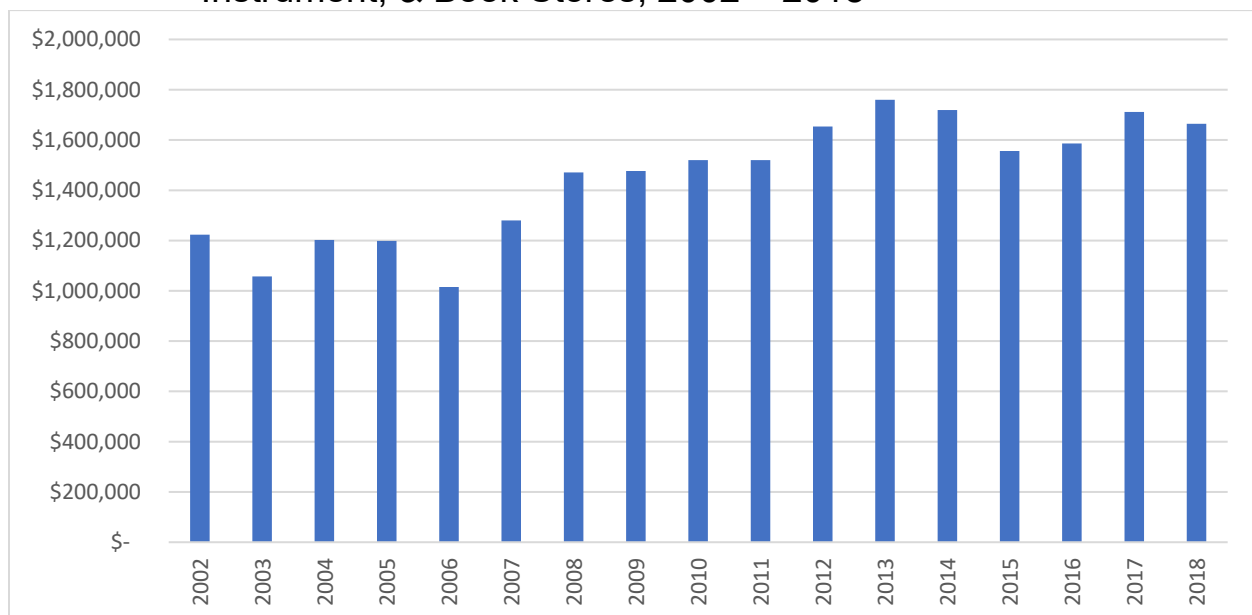
Graphs 281 through 283 reveal that the number of employees in sporting goods, hobby, musical instrument, and book stores is relatively stable for the time interval, although there is some fluctuation. Total wages and average wage both show an upward sloping trend.

**Graph 281: ZIP 67501, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



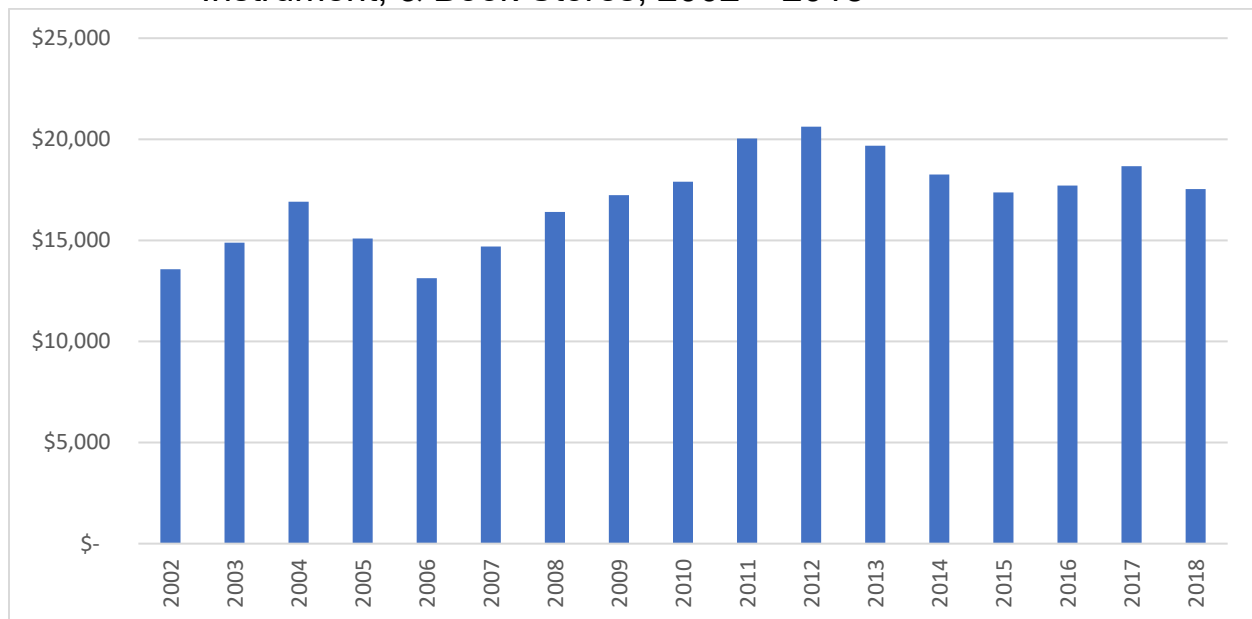
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 282: ZIP 67501, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 283: ZIP 67501, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018

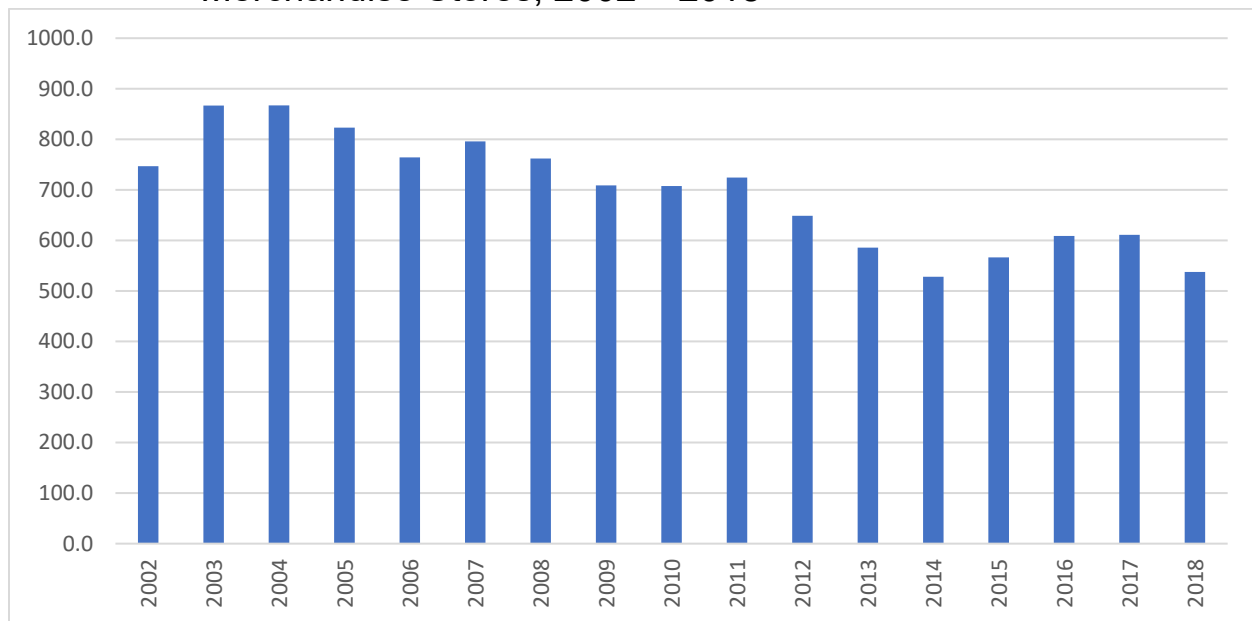


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 284 through 286 show that as the number of employees at general merchandise stores have trended downward, the average wage has trended higher because the total wages have fluctuated around a flat line.

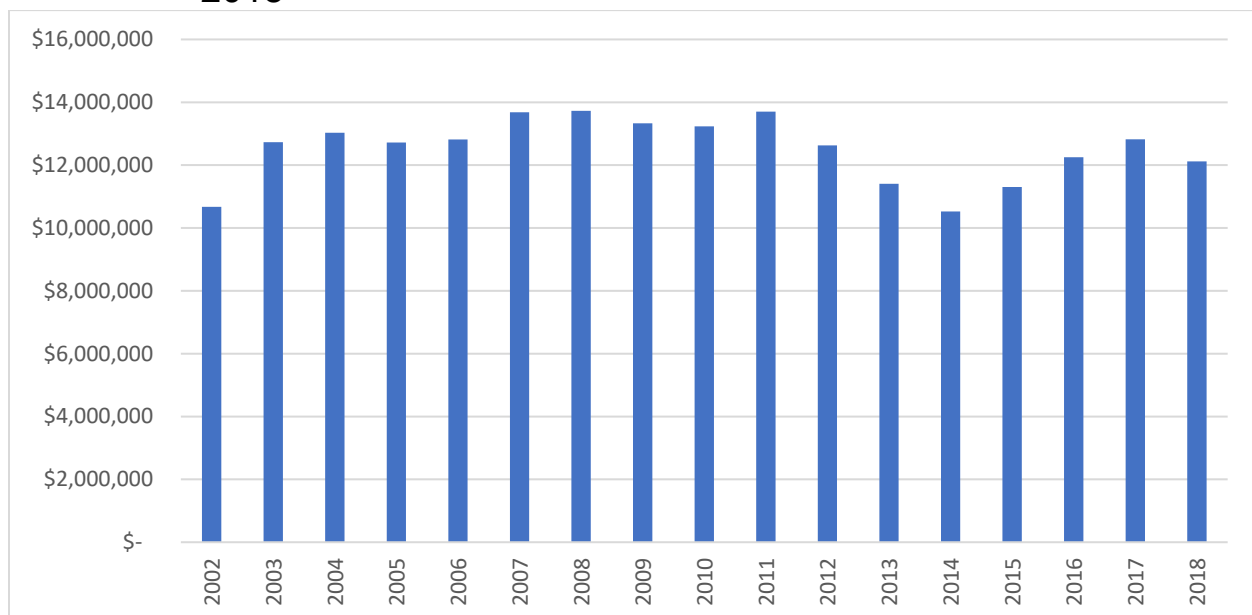


**Graph 284: ZIP 67501, Average Number of Employees, General Merchandise Stores, 2002 – 2018**



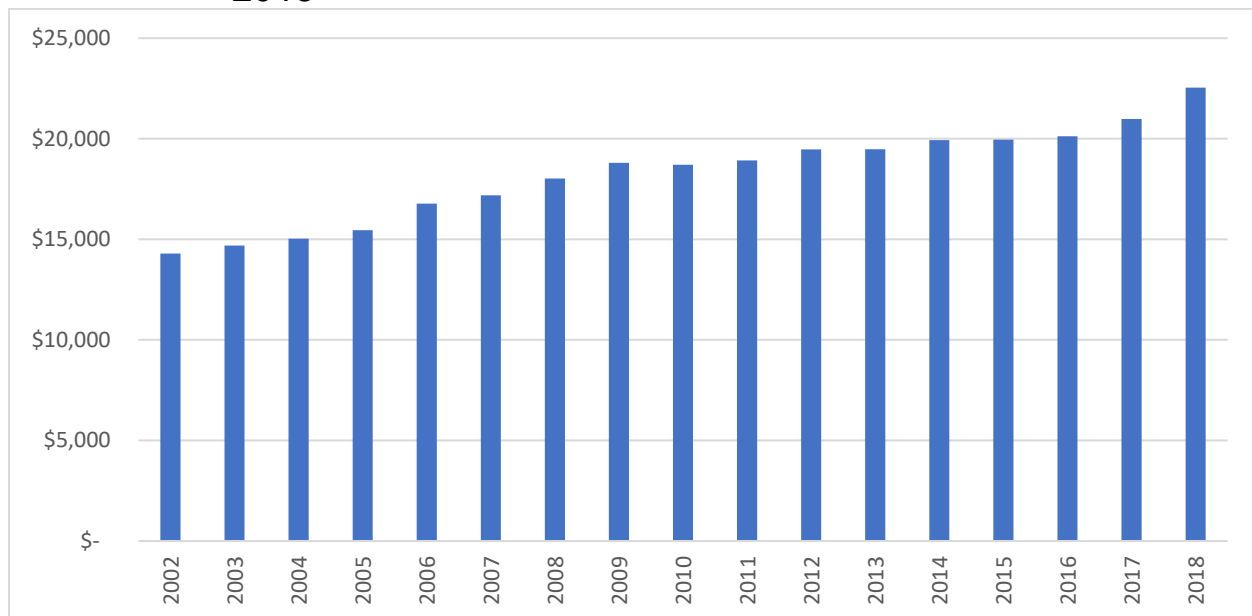
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 285: ZIP 67501, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

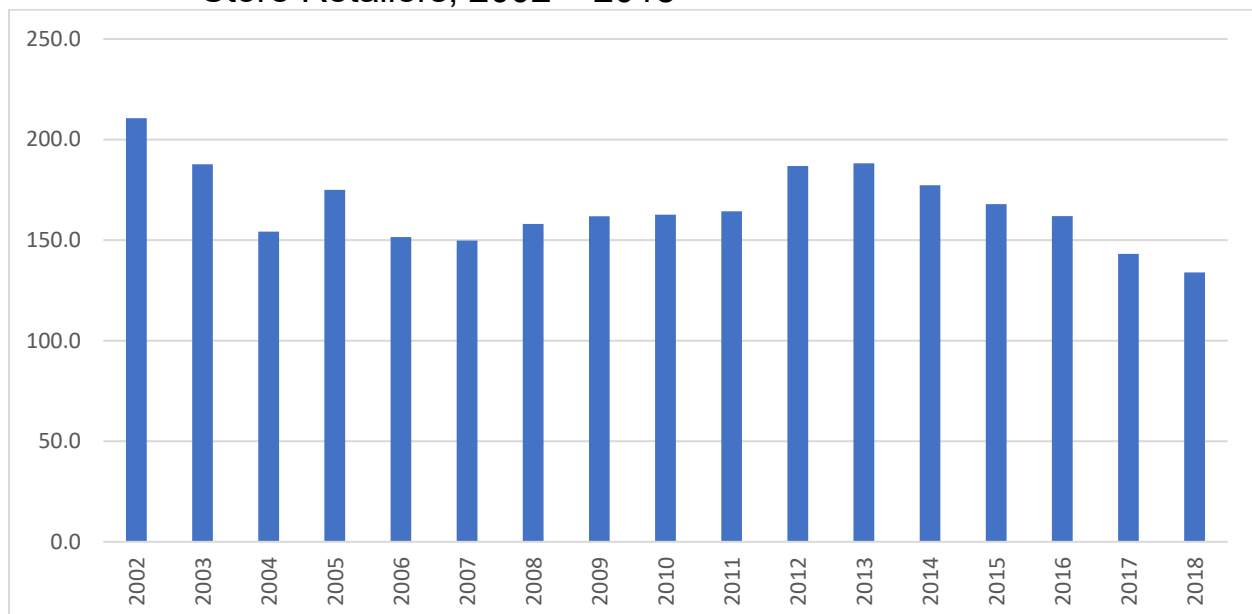
**Graph 286: ZIP 67501, Average Wage, General Merchandise Stores, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 287 shows that the number of employees at miscellaneous store retailers in ZIP 67501 declined from 210 people in 2002 to about 130 people in 2018.

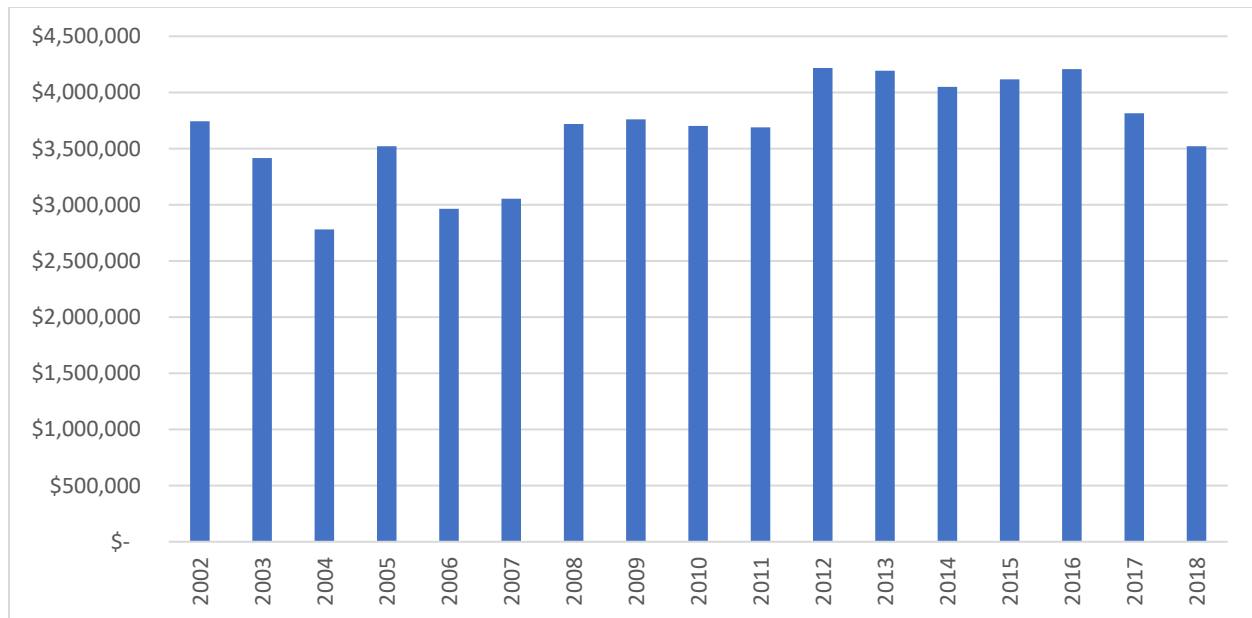
**Graph 287: ZIP 67501, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

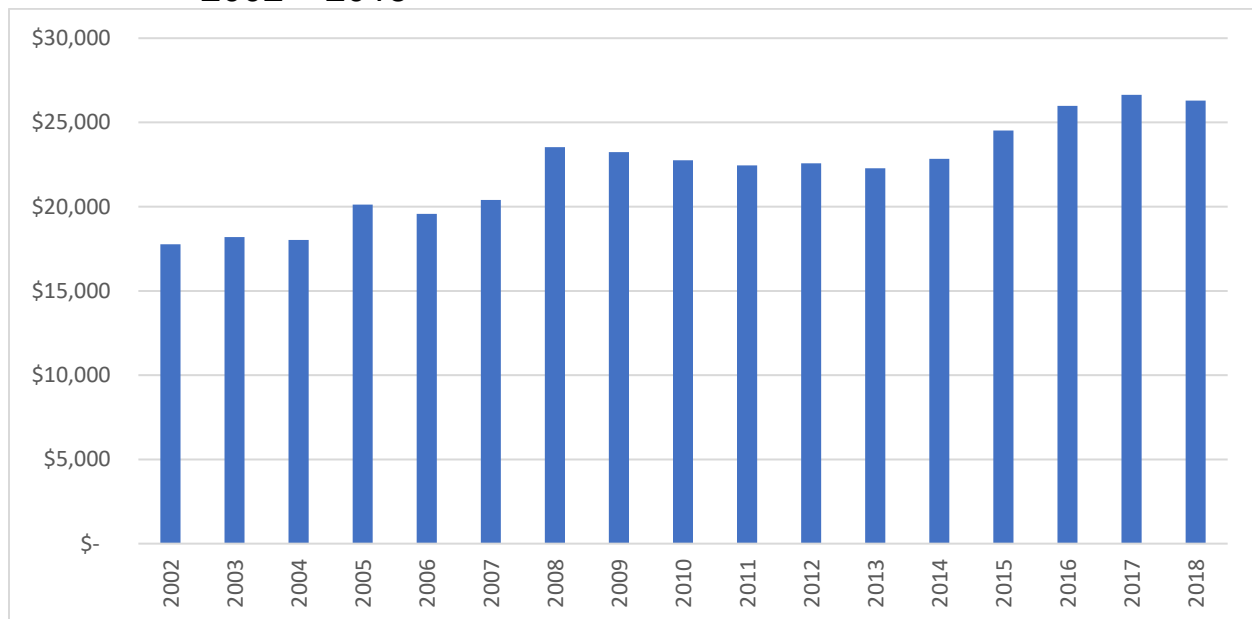
Graph 288 shows that total wages at miscellaneous store retailers fluctuated around \$3,500,000 from 2002 to 2018. Because there was a decline in the number of employees the average wage trended upward over the time interval.

**Graph 288: ZIP 67501, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

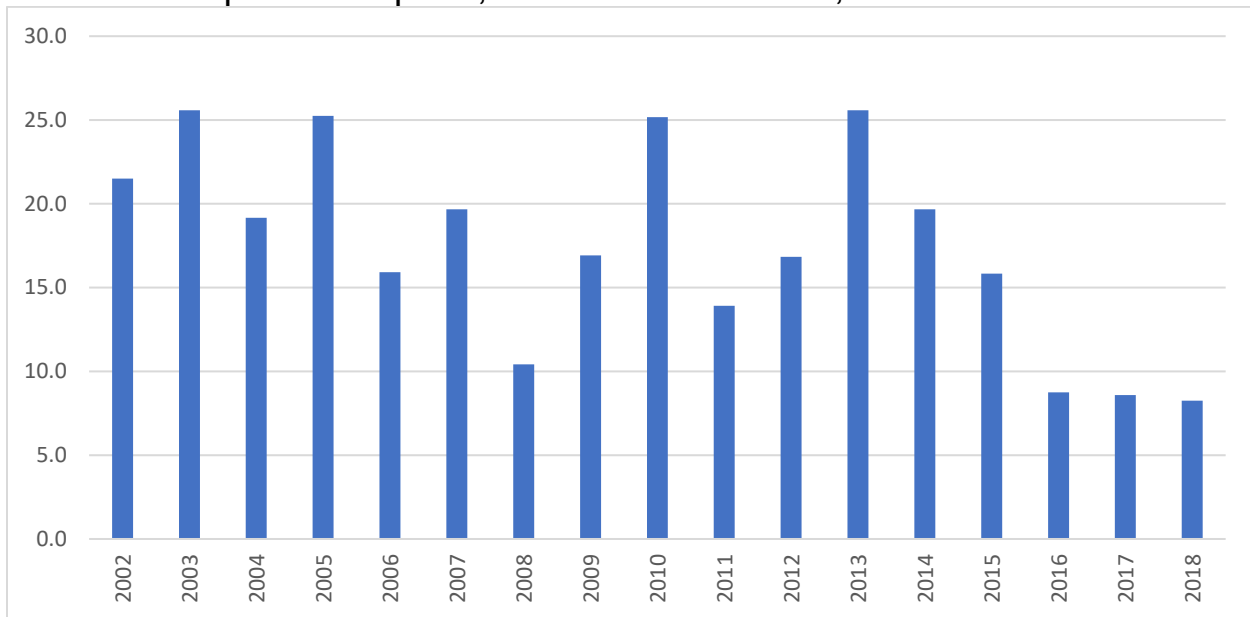
Graph 289: ZIP 67501, Average Wage, Miscellaneous Store Retailers, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

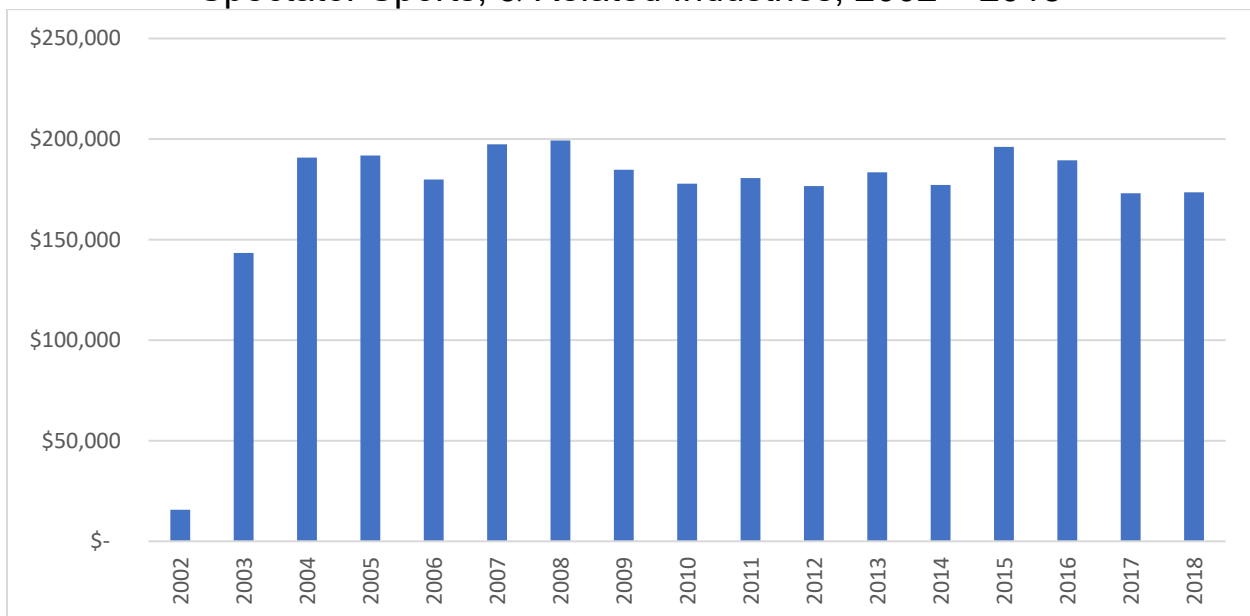
Graphs 290 through 292 present information about performing arts, spectator sports, and related industries in ZIP 67501. This is a small sector with about 25 employees in the best years and less than 10 at the lowest points. Total wages tended to stay between \$170,000 and \$200,000.

Graph 290: ZIP 67501, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018



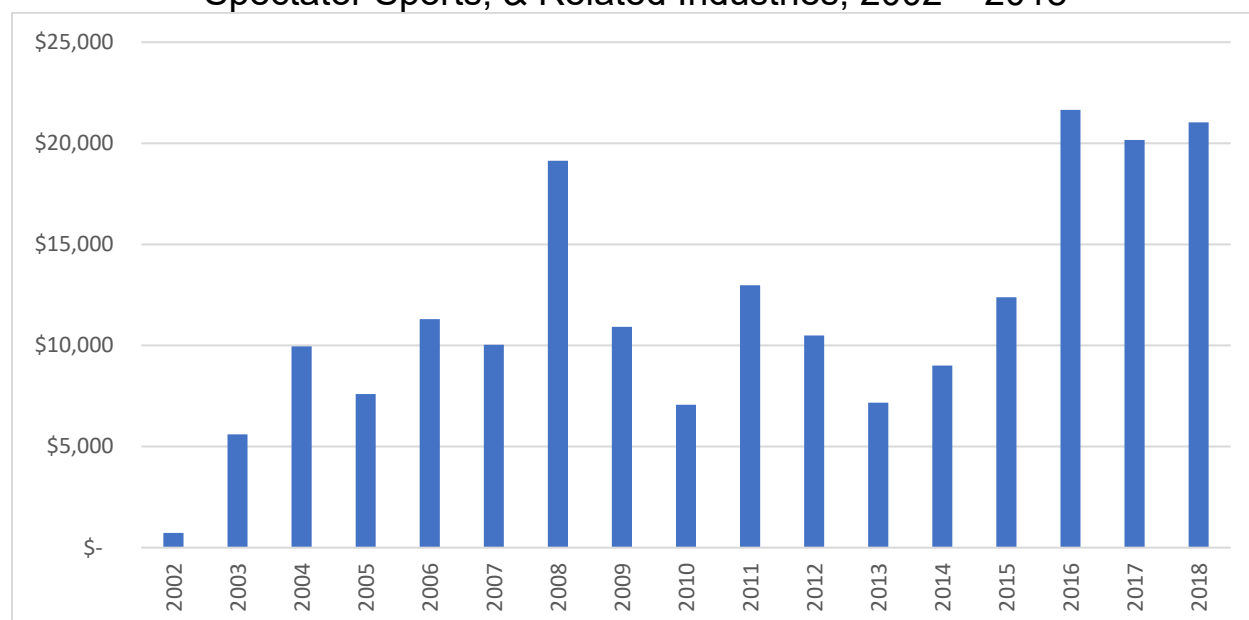
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 291: ZIP 67501, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

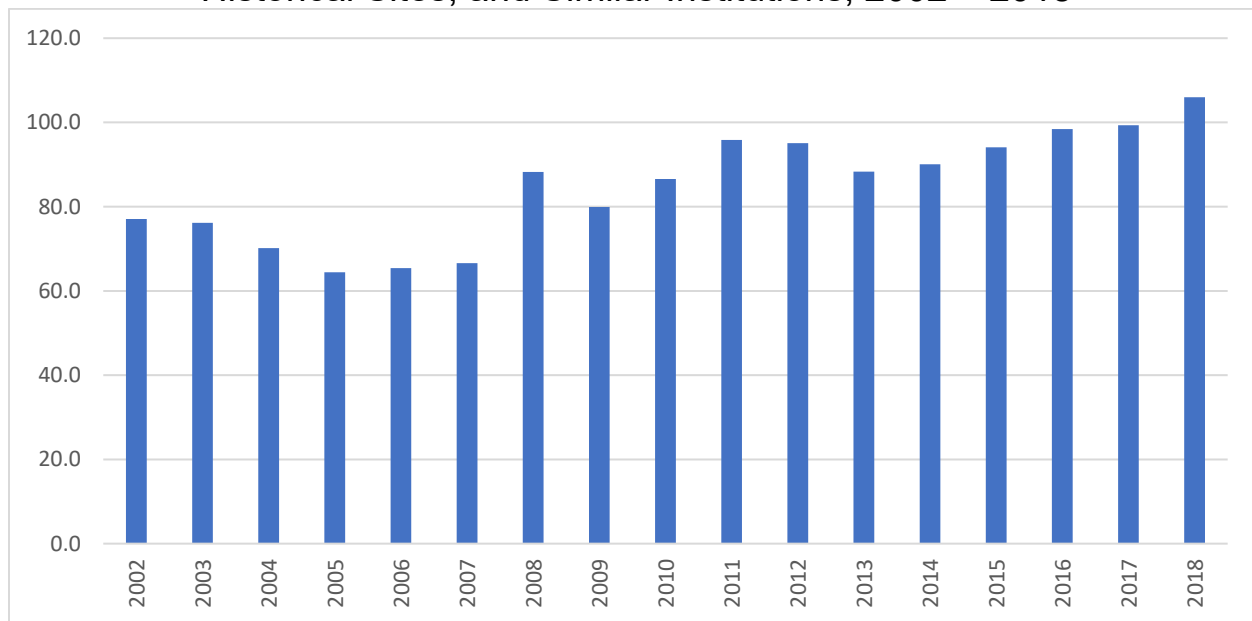
**Graph 292: ZIP 67501, Average Number of Employees, Performing Arts, Spectator Sports, & Related Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

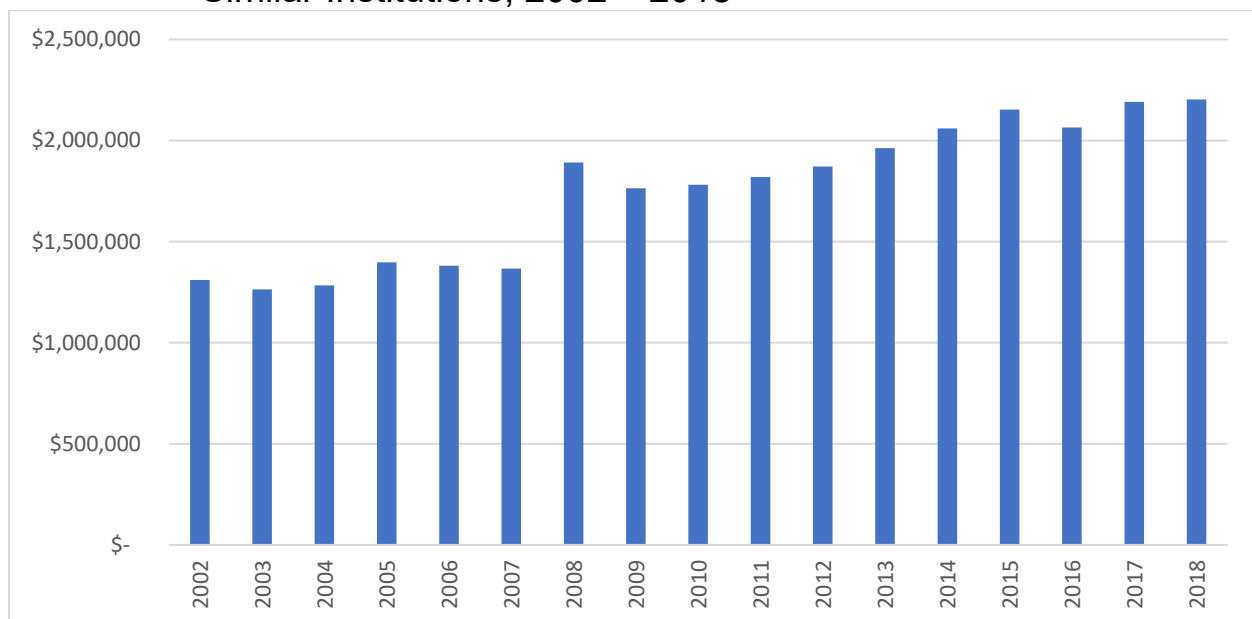
Graphs 293 through 295 show that the number of employees in museums, historical sites, and similar institutions began an upward trend starting in 2006. For the years 2008 through 2012 the number of employees was above the upward sloping trend line. Graph 294 shows an upward sloping trend line in total wages starting in 2008. Graph 295 shows an average wage that fluctuates around \$20,000 per year.

**Graph 293: ZIP 67501, Average Number of Employees, Museums, Historical Sites, and Similar Institutions, 2002 – 2018**



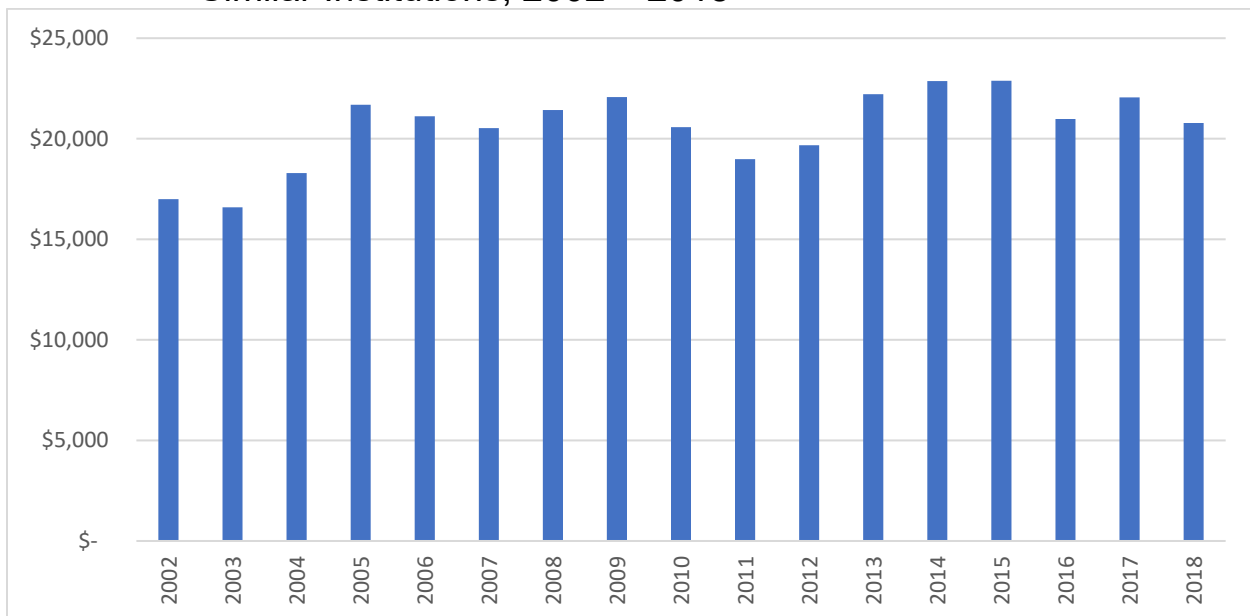
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 294: ZIP 67501, Total Wages, Museums, Historical Sites, and Similar Institutions, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 295: ZIP 67501, Average Wage, Museums, Historical Sites, and Similar Institutions, 2002 – 2018

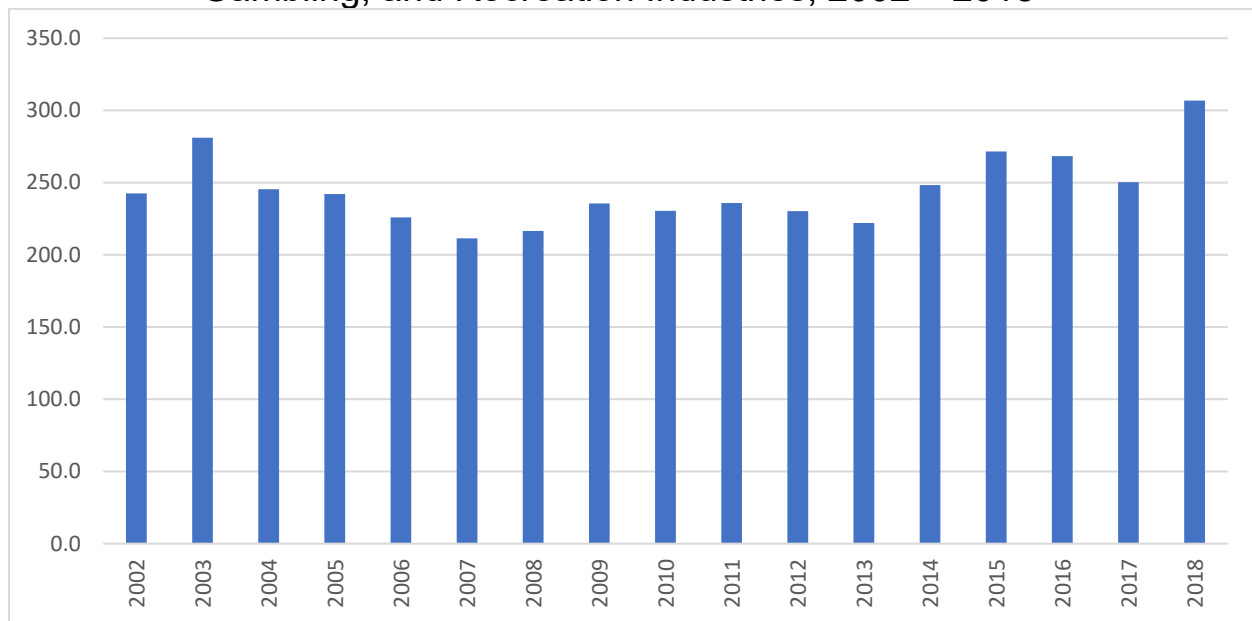


Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graphs 296 through 298 show that the number of employees in the amusement, gambling, and recreation industries usually fluctuated in a range of 225 to 275 people, although in 2018 the number of employees increased to more than 300 people. Total wages in 2018 increased by more than \$1,000,000. And, the average wage has followed an upward trend from 2003 through 2018.

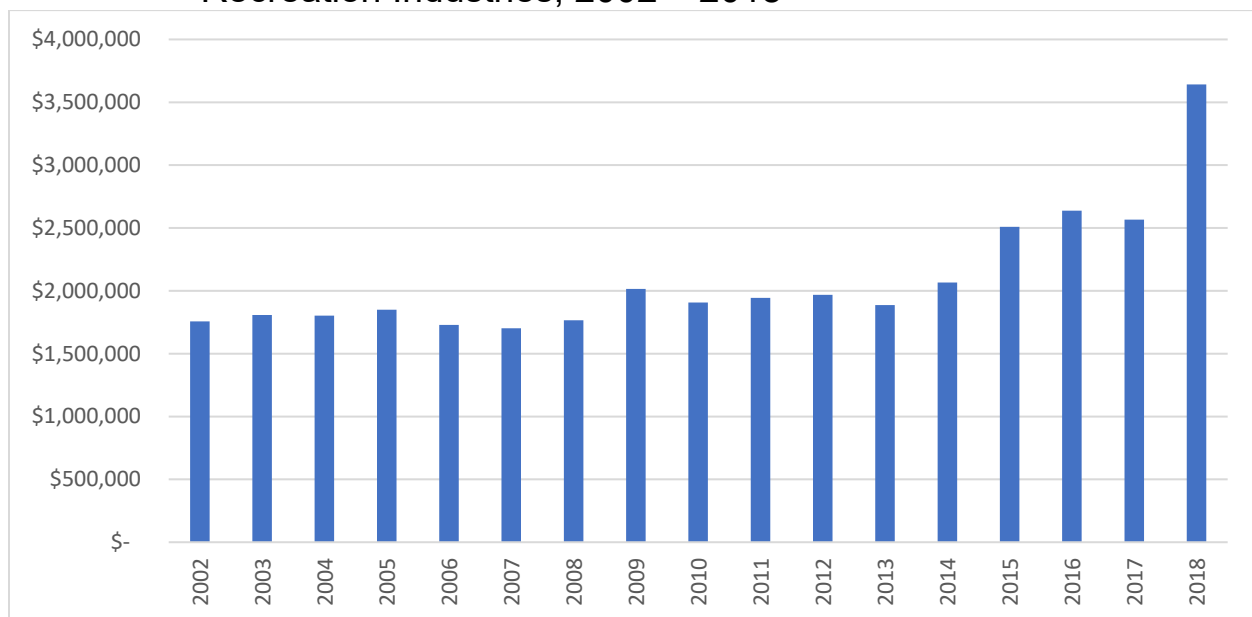


**Graph 296: ZIP 67501, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



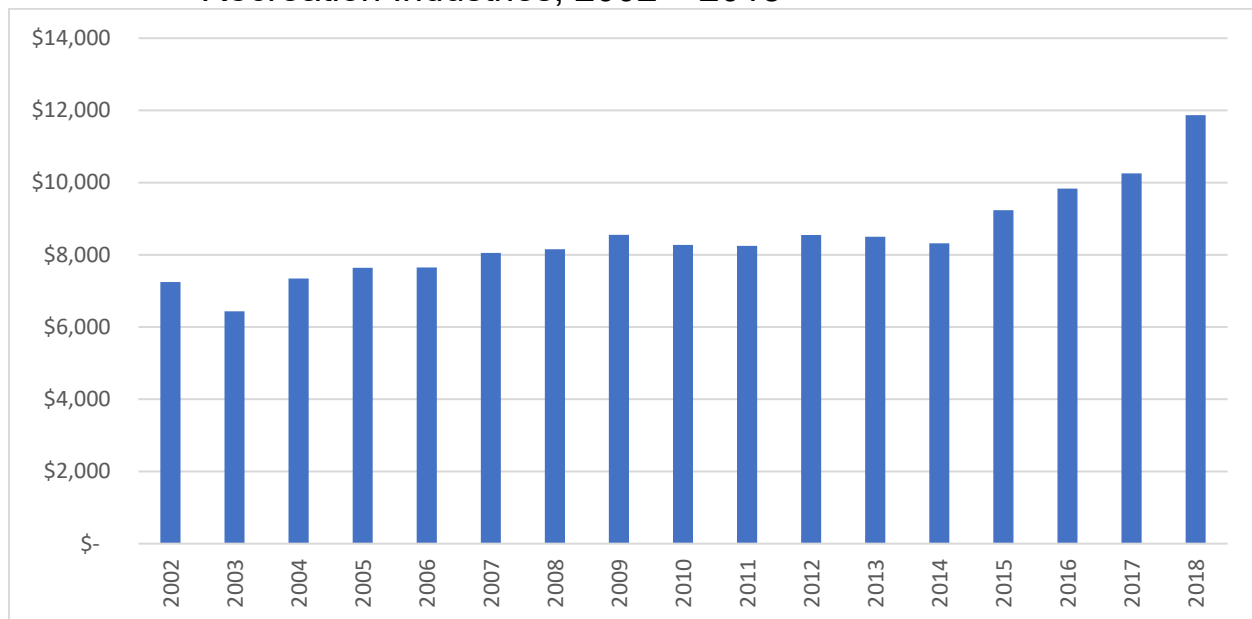
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 297: ZIP 67501, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

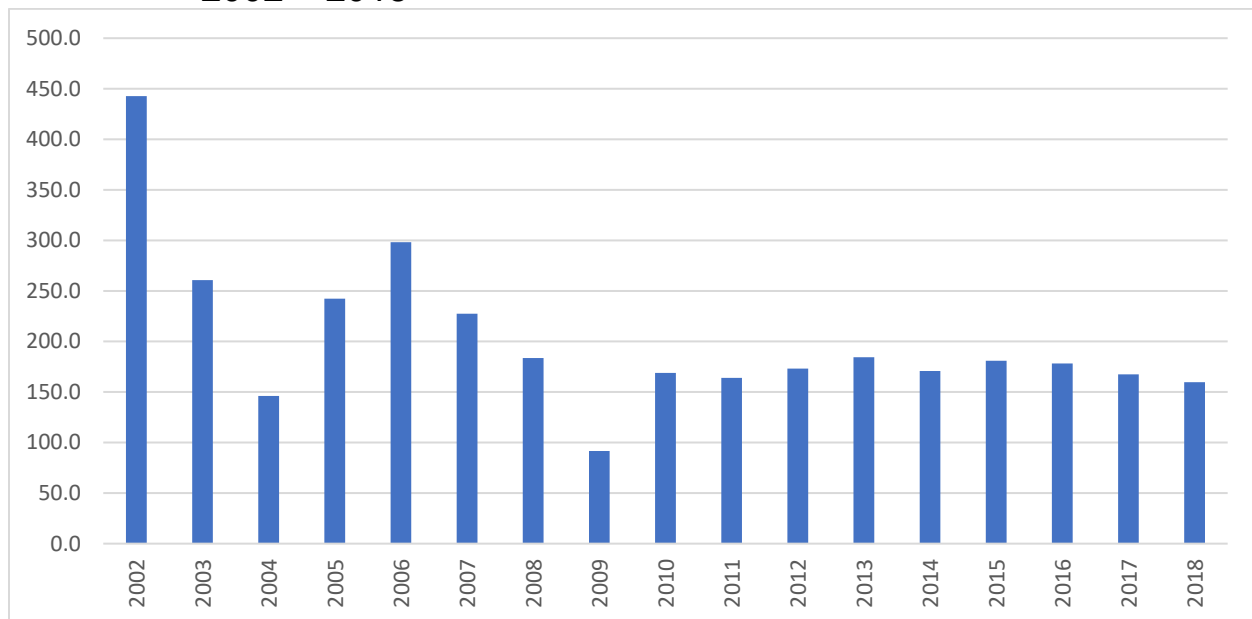
Graph 298: ZIP 67501, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

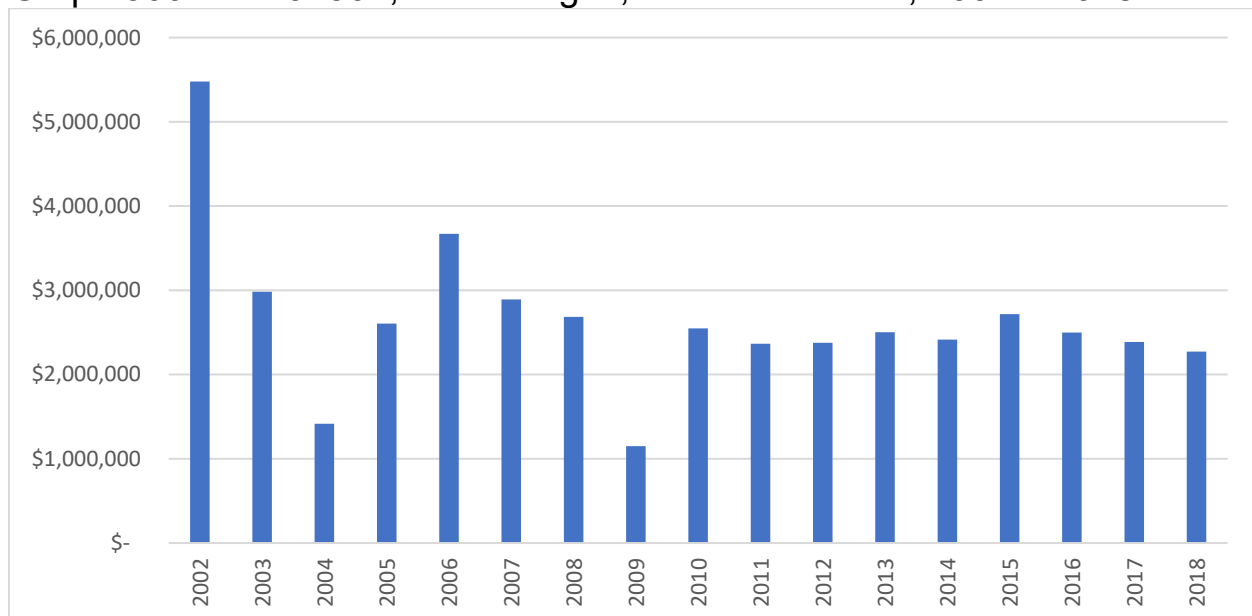
Graph 299 suggests a bit of instability in the accommodation sector based on the number of employees. In the period from 2002 through 2009 the number of employees declined from just under 450 people to less than 100 people. However, from 2010 through 2018 the number of employees is quite stable at about 175 people. Graph 300 shows the same two patterns occurred for total wages.

**Graph 299: ZIP 67501, Average Number of Employees, Accommodation, 2002 – 2018**



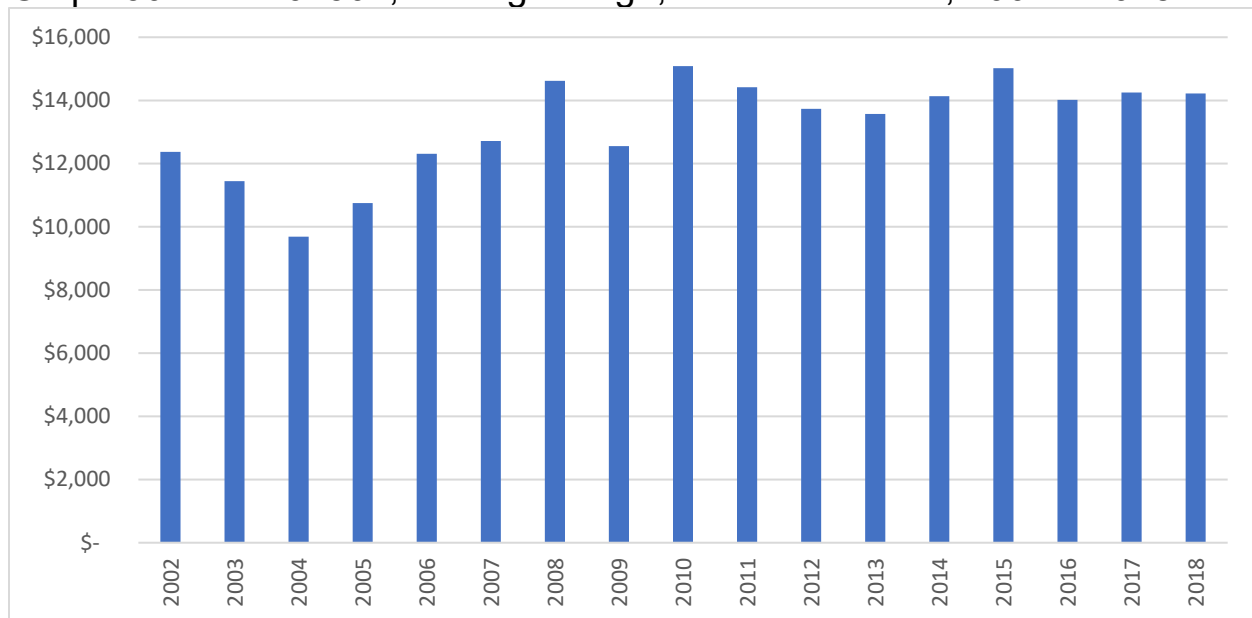
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 300: ZIP 67501, Total Wages, Accommodation, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

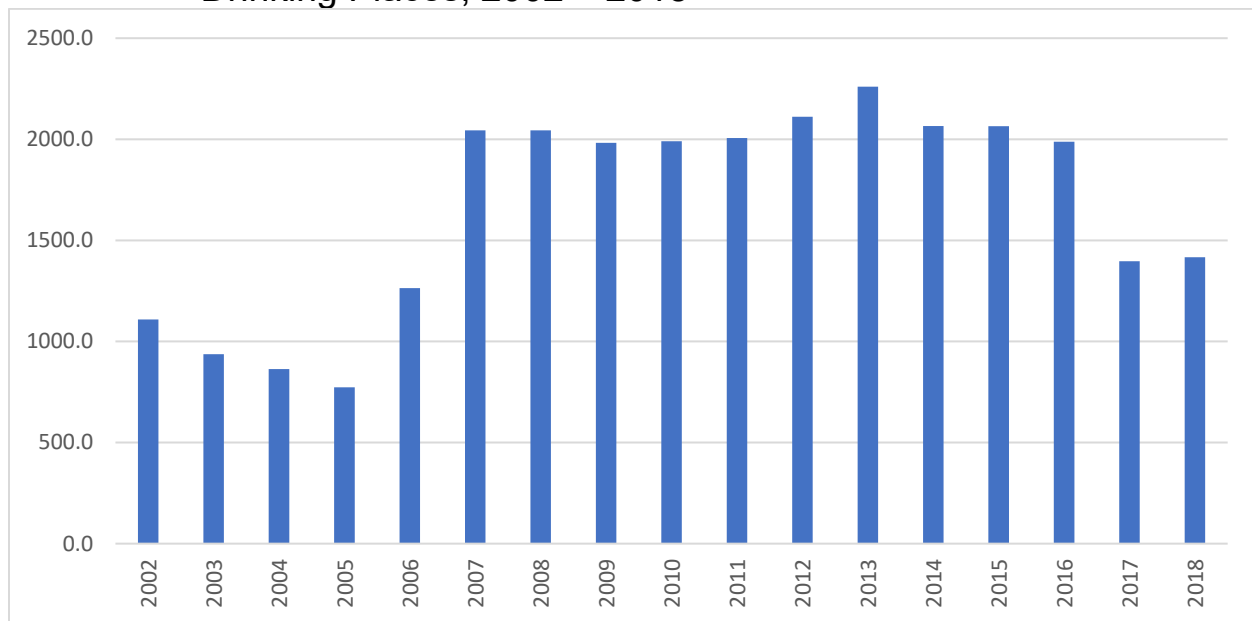
Graph 301: ZIP 67501, Average Wage, Accommodation, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

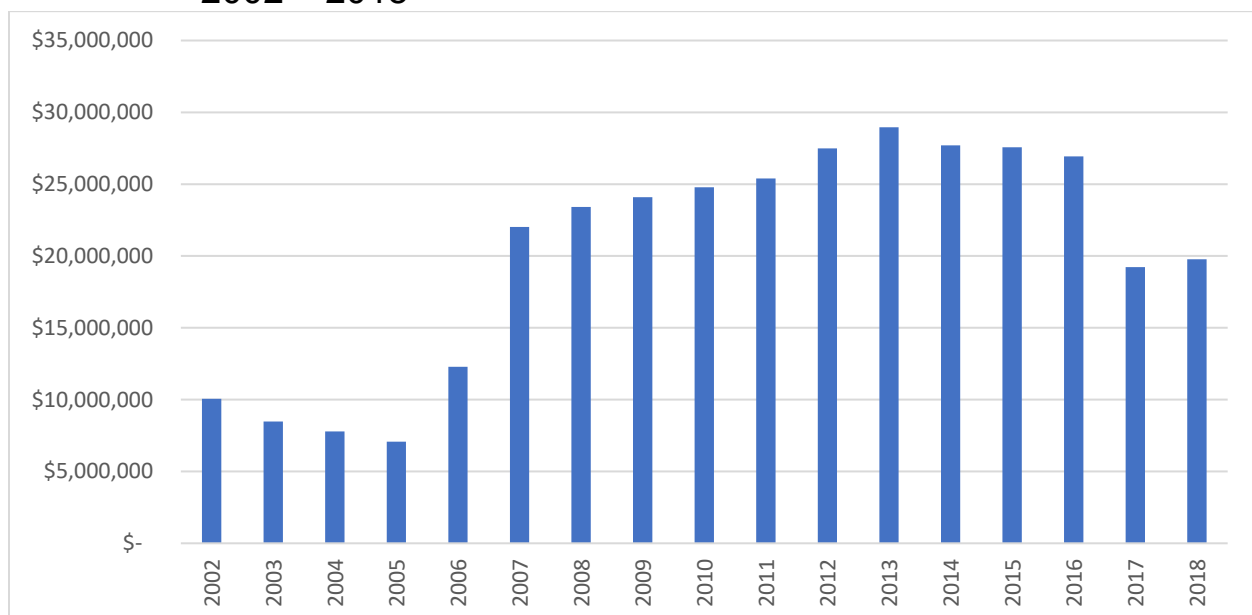
Graph 302 shows that the number of employees of food services and drinking places in ZIP 67501 were quite constant at about 2000 people for the period from 2007 through 2016. For the five years preceding this period there were about half as many employees; and for the two years after this period the number was less than 1500 people. This pattern was also reflected in total wages. The average wage followed a smoother, upward trend.

**Graph 302: ZIP 67501, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



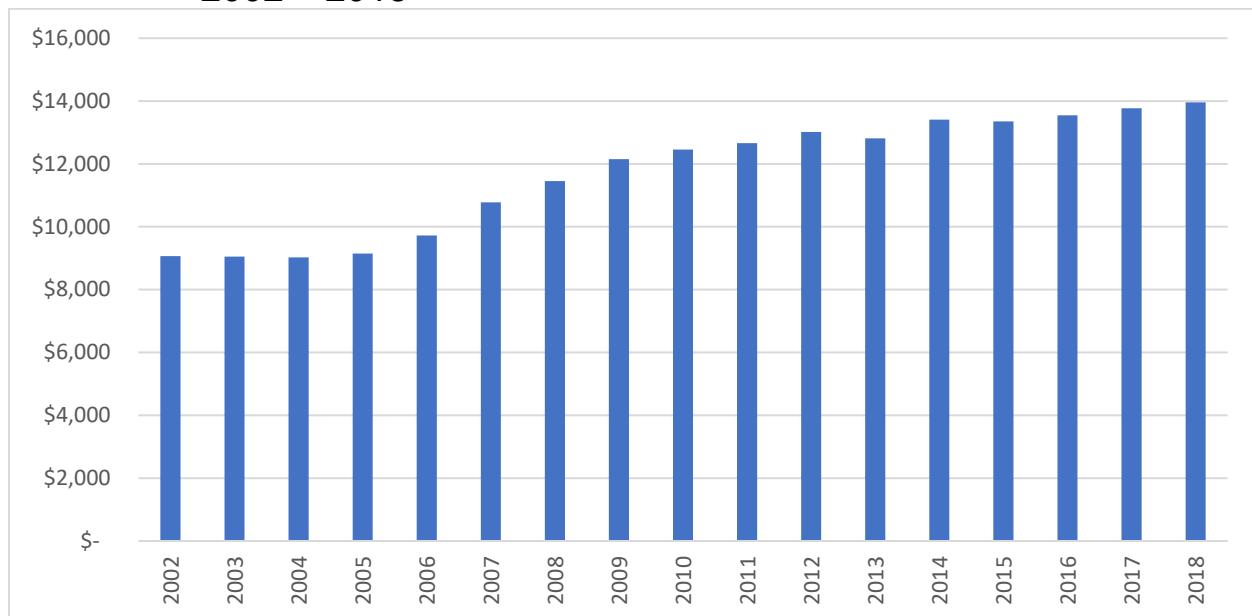
Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

**Graph 303: ZIP 67501, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Graph 304: ZIP 67501, Average Wage, Food Services & Drinking Places, 2002 – 2018



Source: Data from KS Department of Labor, Extraction and Graph by Docking Institute

Maps 29 and 30 show the area around the Strataca STAR Bond district A from before the beginning of the project through 2019. It can be seen that additional development south of 11<sup>th</sup> Avenue has occurred slowly over this time period. Several hotels and restaurants have been built in this area. Although some empty lots still exist they are not overly desirable as they are next to the railroad tracks.

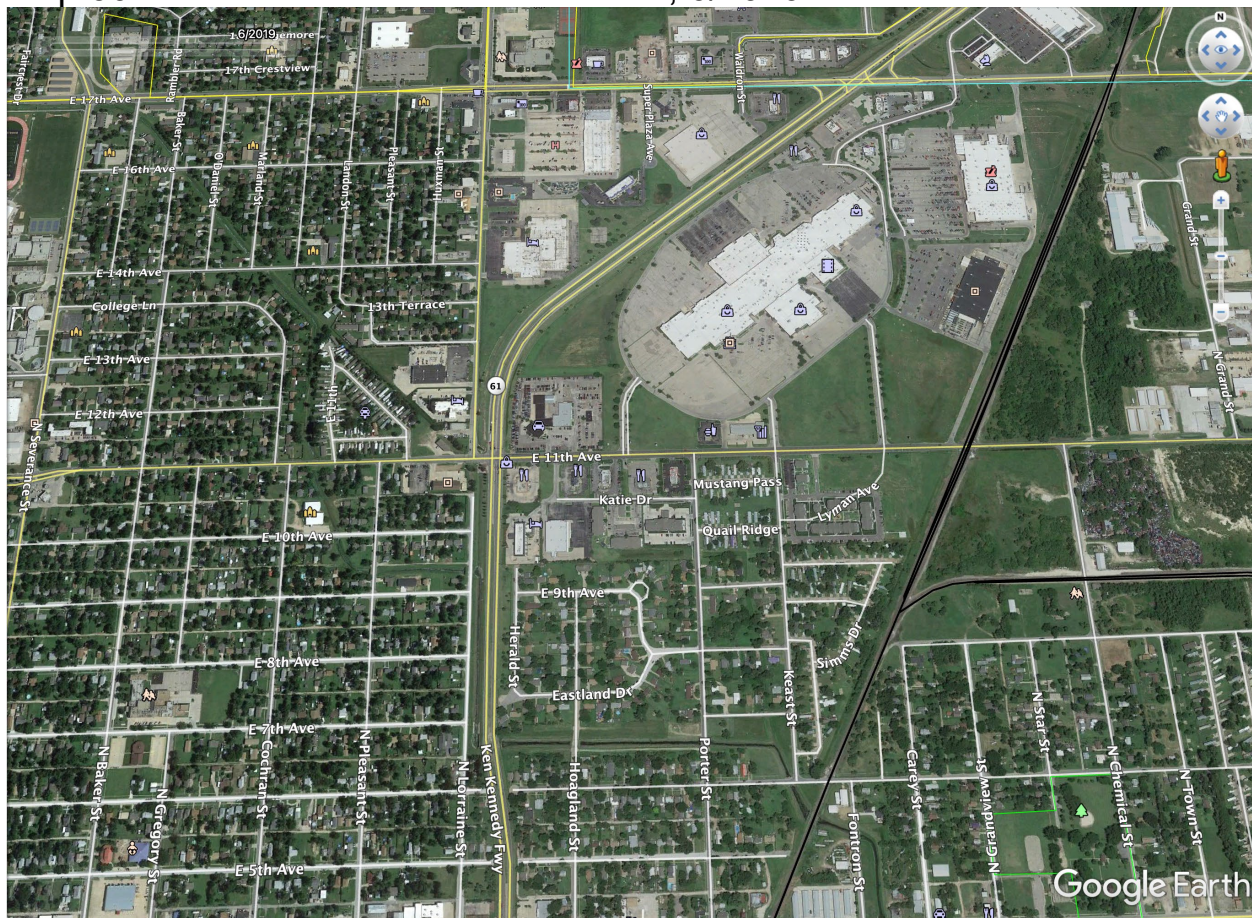
Map 29: Strataca STAR Bond District A, 3/2002



Source: U.S. Geological Survey, retrieved from Google Earth.



Map 30: Strataca STAR Bond District A, 6/2019

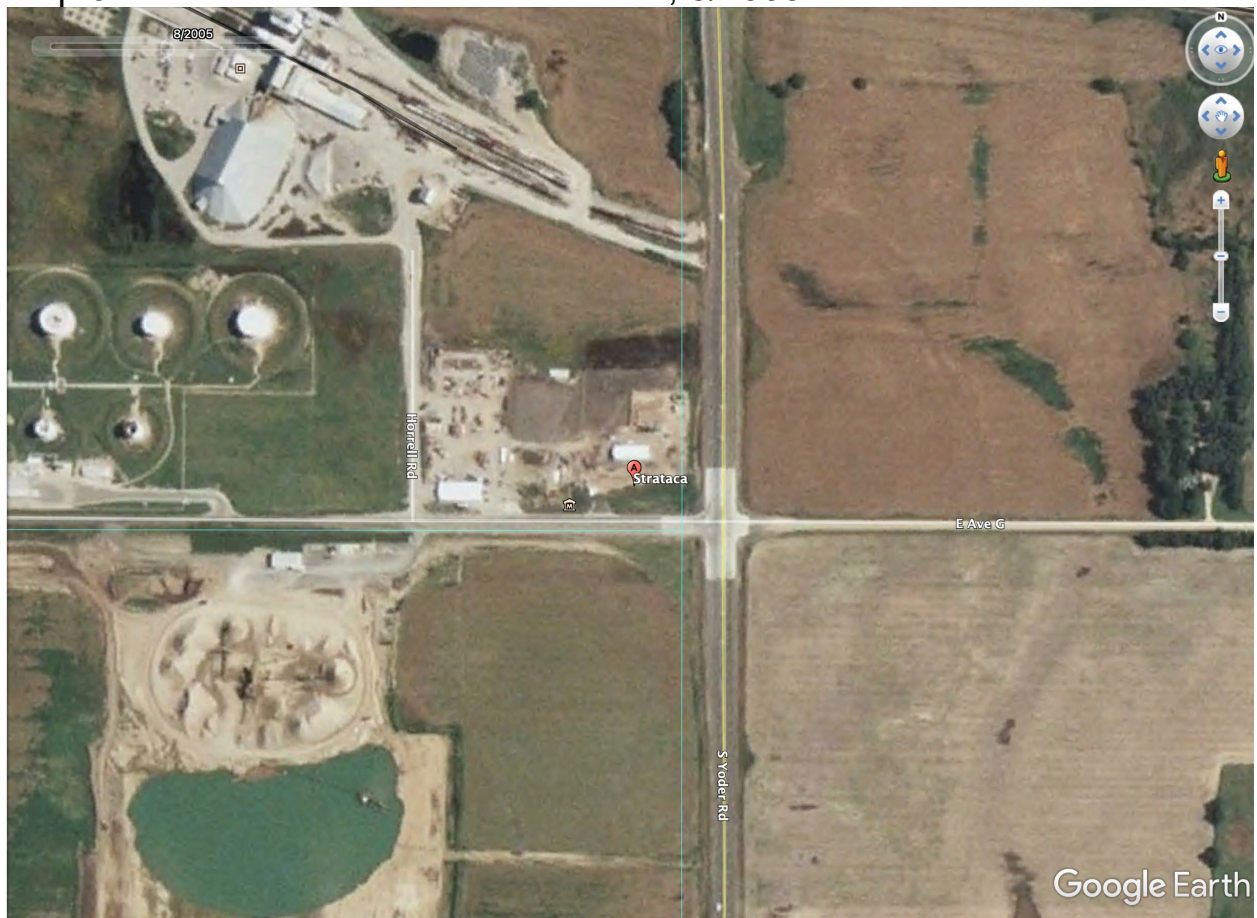


Source: Google Earth

Maps 31 and 32 show the area around Strataca both before the project began and as it is currently being used. This is an industrial area next to an agricultural area. With the exception of the Strataca facility there has been no change in usage (although the rail facility shows improvements) over the past fourteen years.

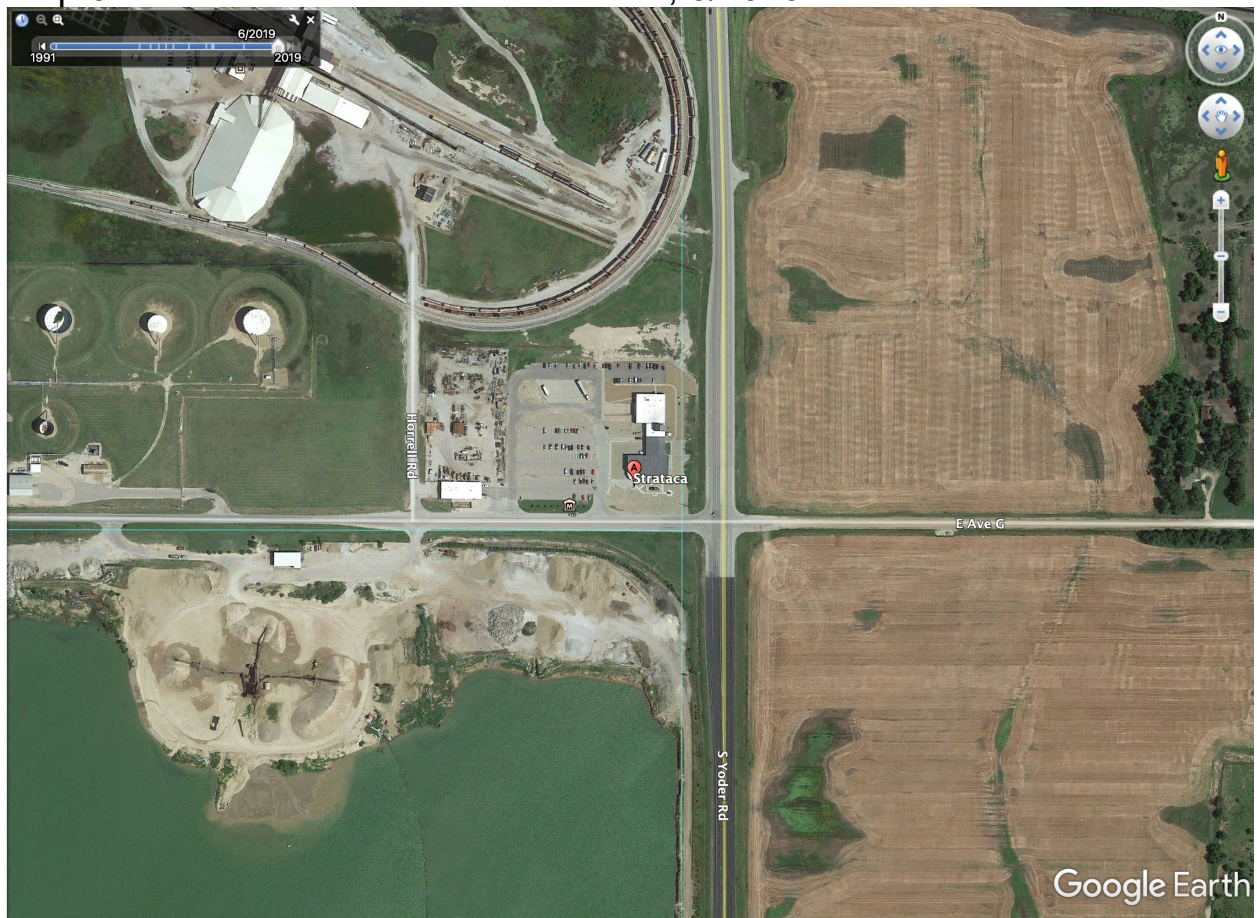


Map 31: Strataca STAR Bond District B, 8/2005



Source: Google Earth

## Map 32: Strataca STAR Bond District B, 6/2019



Source: Google Earth

### STAR Bond Project

Strataca STAR Bond project

Begin date 2006

Sales Tax through 2013 = \$ 4,931,330.52

Annual Average (7 years) = \$ 704,475.79

STAR Bonds paid off 2013

Hutchinson ZIP Code: 67501

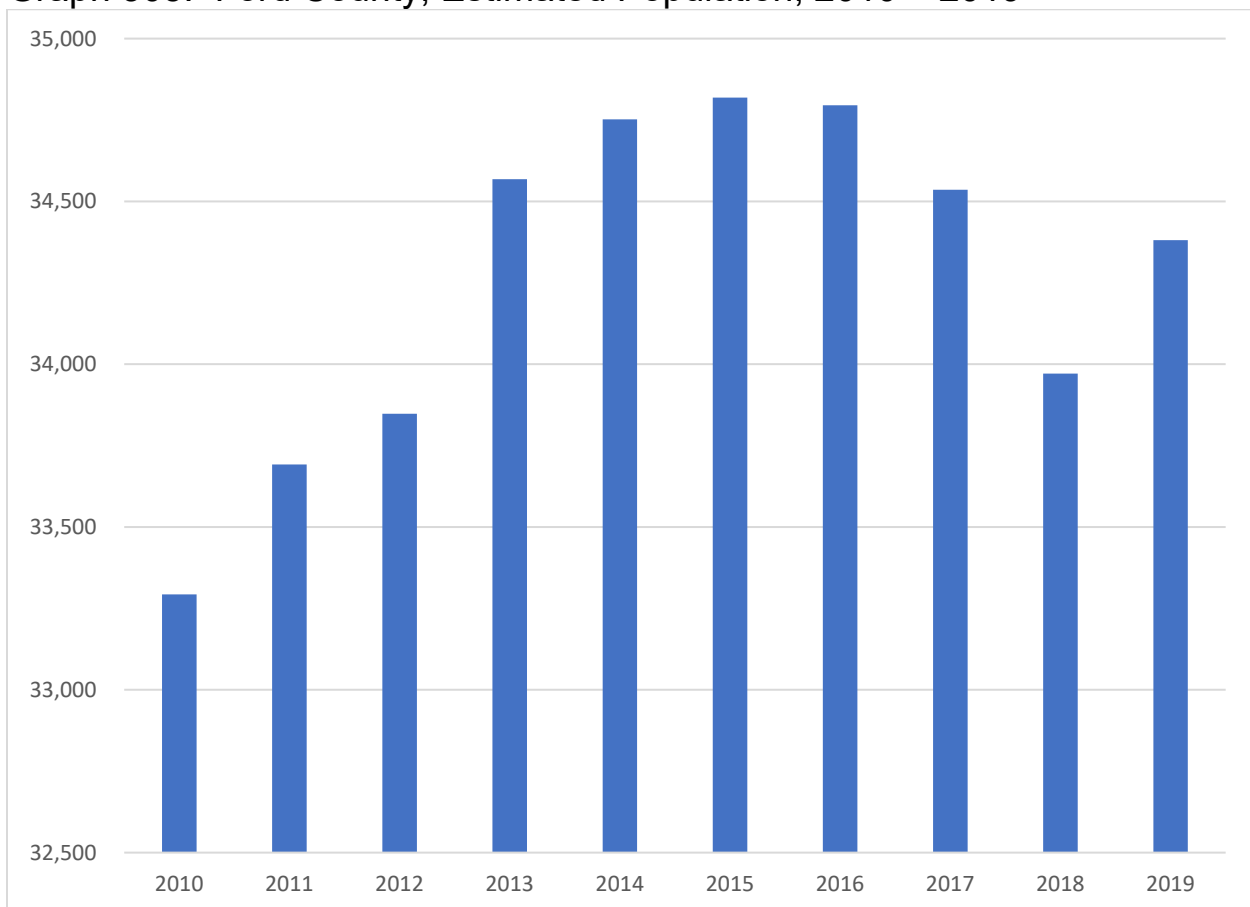
## Hutchinson Findings

- The Kansas Underground Salt Mine (now Strataca) was the STAR Bond issue in Hutchinson in 2006, and has since been fully paid.
- For most of the years from 2007 museum, heritage, zoo, and recreational services in Reno County have a visitor RSC greater than 70 percent.
- NAICS data show that the number of employees in museums, historical sites, and similar institutions began an upward trend starting in 2006.
- Kansas has been collecting sales tax for about 8 years, a longer duration than the diversion of sales taxes before the STAR Bonds for Hutchinson were paid.
- The smaller size of Hutchinson and its more limited governmental resources prevented our acquisition of some location specific data that the two larger communities had collected in electronic format initially, hampering ability to discern some of the more direct measures of STAR Bond impacts in Hutchinson.

## Dodge City

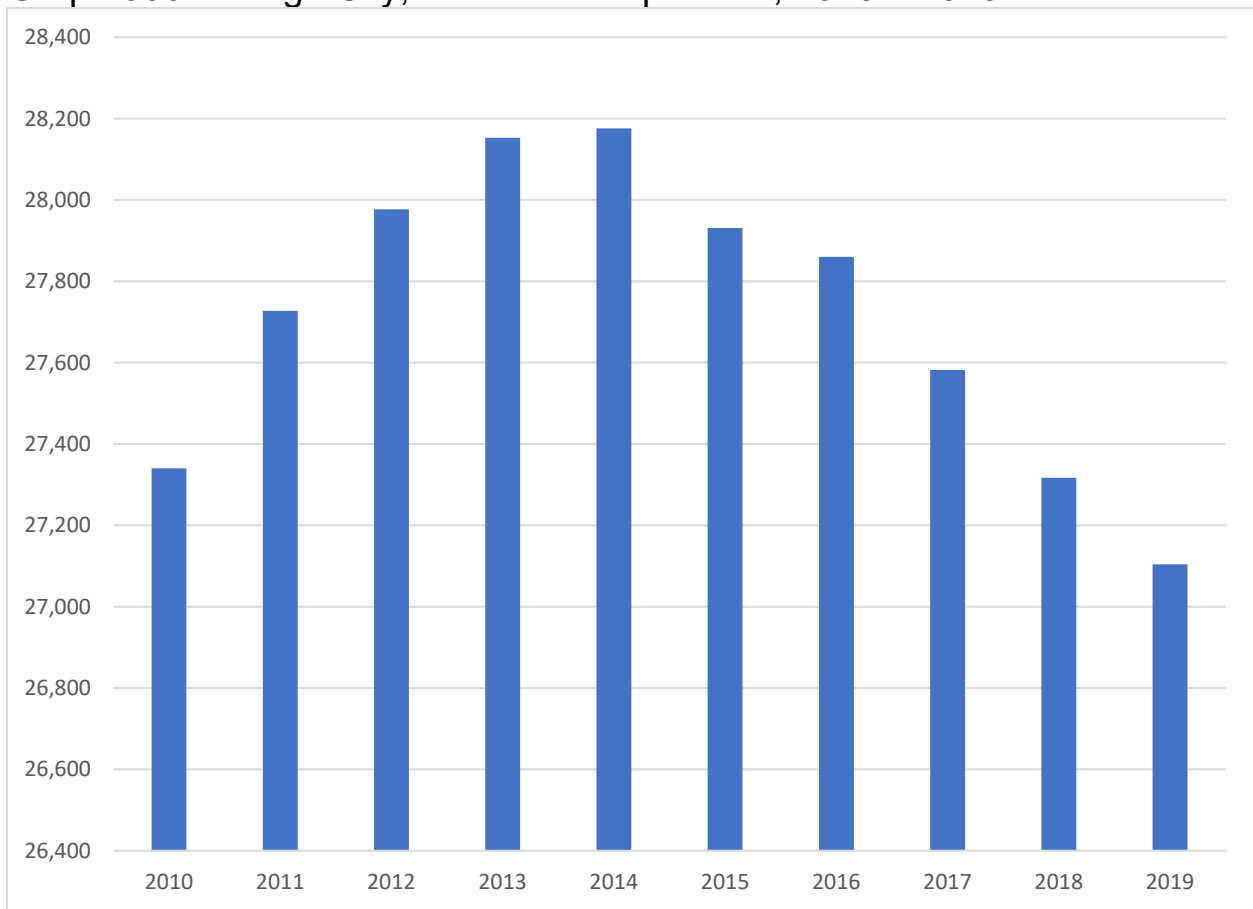
The Heritage Area Project in 2015 and the Power Center Area Project in 2018 are the two STAR Bond issues in Dodge City. Dodge City is a smaller and more remote community than the other STAR Bond project communities. Again, we look first at the larger context and then focus on the specific STAR Bond projects. Because people are the major economic agents we look at population first. Graphs 305 and 306 show the estimated population for Ford County and Dodge City for the past decade. Ford County reached its peak in 2015 at 34,819 people. The peak population for Dodge City was 28,176 in 2014. In 2019 the Ford County population increased while the Dodge City population decreased. This may suggest that residential development is occurring just outside the city.

Graph 305: Ford County, Estimated Population, 2010 – 2019



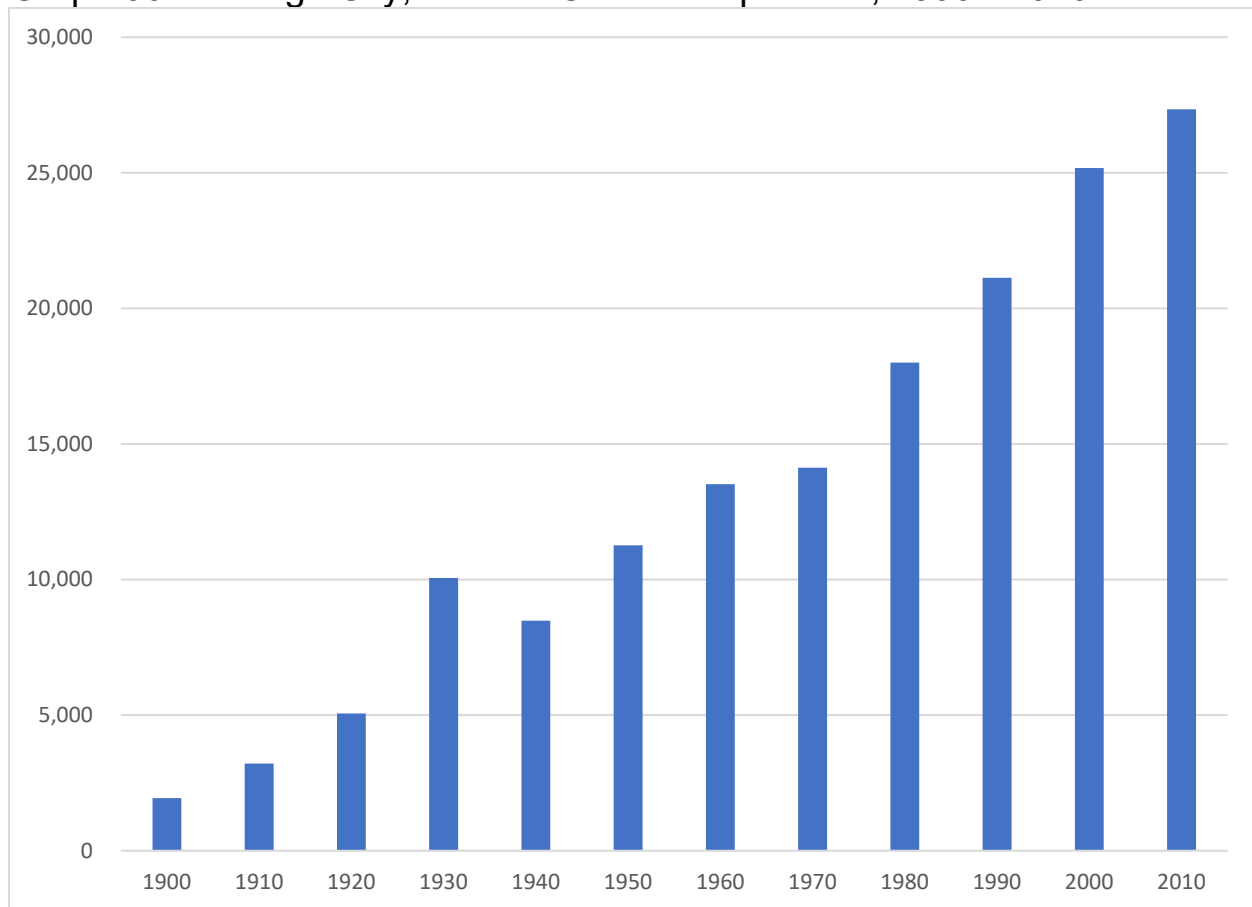
Source: U.S. Census Bureau

**Graph 306: Dodge City, Estimated Population, 2010 – 2019**



Source: U.S. Census Bureau

**Graph 307: Dodge City, Kansas Census Population, 1990 - 2010**

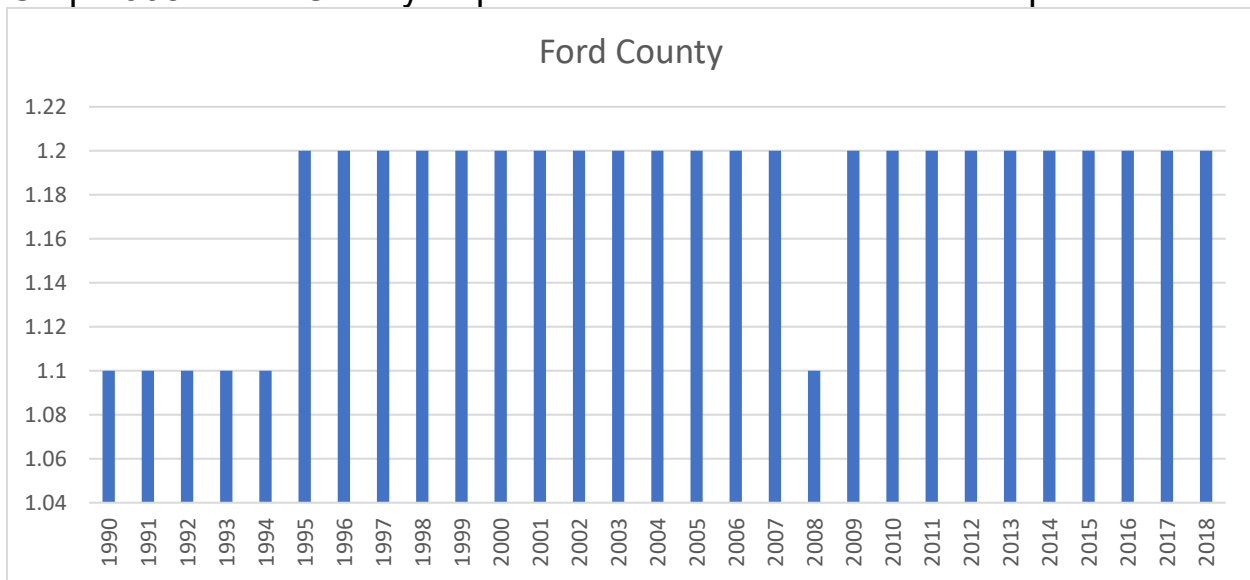


Source: U.S. Census Bureau, Decennial Census, 1900 – 2010

Graph 307 shows that the population of Dodge City has generally followed an upward trend since 1900.



Graph 308: Ford County Population as Percent of Kansas Population

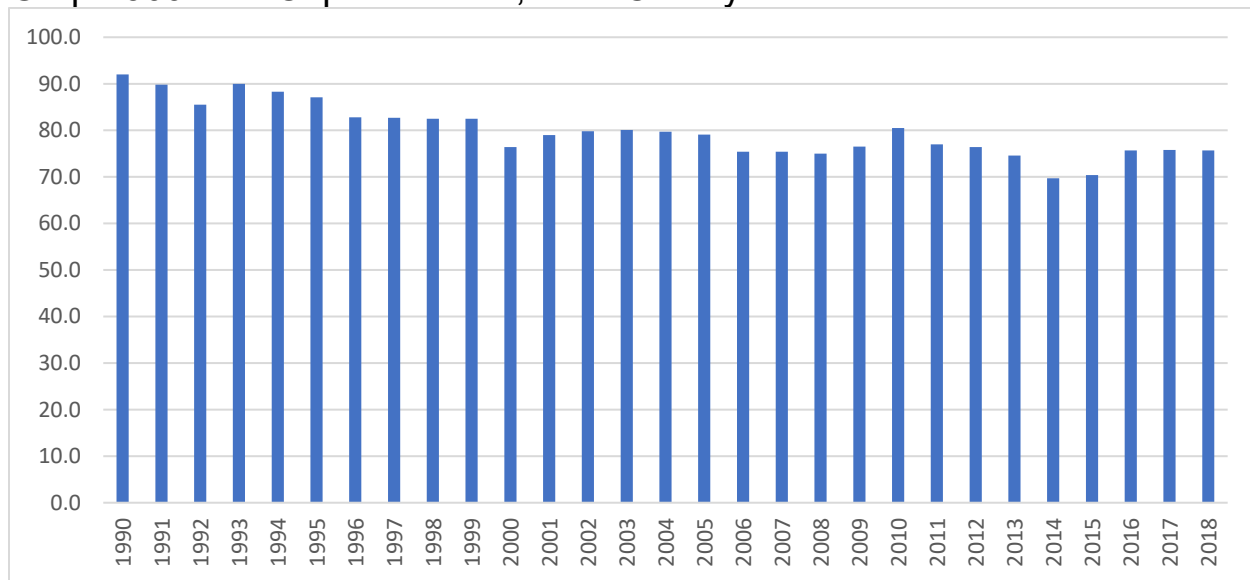


Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

Graph 308 shows that from 1990 through 2018 shows that the population of Ford County has varied between 1.1 percent and 1.2 percent of the Kansas population. Thus, Ford County's population is growing close to the same rate as the Kansas population over this period of time.

Graph 309 provides a relative measure of income for Ford County compared with the State of Kansas. Ford County's per capita income as a percentage of Kansas' per capital income has declined from 92 percent in 1990 to 76 percent in 2018.

Graph 309: Per Capita Income, Ford County as Percent of Kansas



Source: CAINC1 Personal Income Summary: Personal Income, Population, Per Capita Personal Income Percent of State by County. Bureau of Economic Analysis. Calculations by author.

### Dodge City STAR Bond Project Districts

Maps 33 and 34 show the two STAR Bond project districts in Dodge City. The Heritage Project Area bonds were issued at the end of 2015 while the Power Center Project Area bonds were issued at the end of 2018.

The Heritage District is located in an already developed area of Dodge City, but does include some “brown ground” south of the railroad tracks. The Power Center District is located on “brown ground.” These two projects are related much like the project in Hutchinson which linked a retail district with a tourism district.



Map 33: Heritage District, 10/2016



Source: Google Earth



Map 34: Power Center, 10/2016



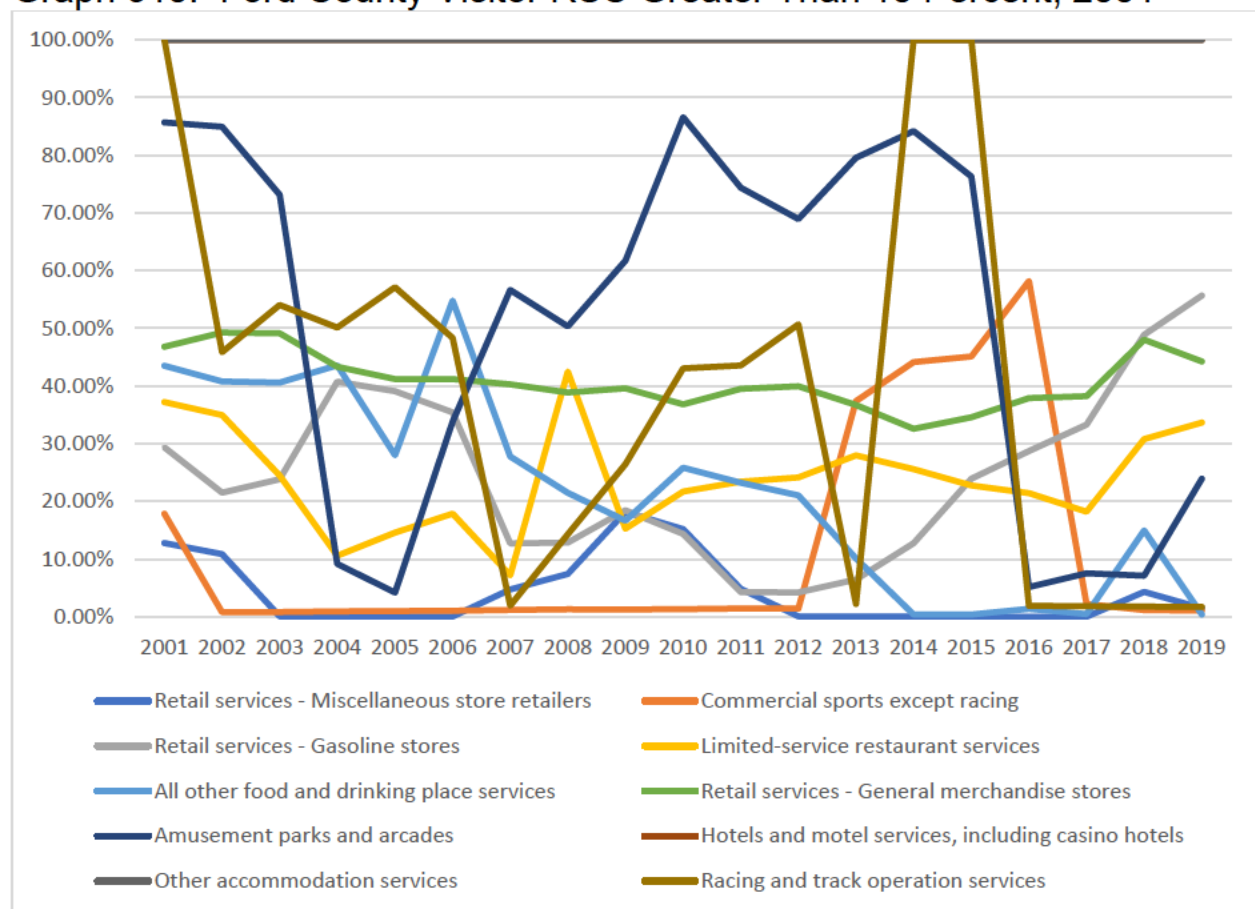
Source: Google Earth

### Ford County Regional Supply Coefficients

Graphs 310 through 312 show the visitor RSCs for Ford County from 2001 through 2019. In order to help the reader discern the changes from year to year the graphs are based on the RSC values in 2001 and are divided into three groups; over ten percent; ten percent to five percent; and under 5 percent. In Ford County, as in Kansas and the other counties we examined, the RSCs for hotels and motels and for other accommodation services are close to 100 percent. Please note, the values for “hotels, motels, including casino hotels”

shown in graph 310 are almost identical to “other accommodation services.” They overlap each other. The percentages for all categories are found in table 37. The other important observation is that because Ford County is the smallest county we consider there is greater volatility in the RSCs. That is, a few individuals (5) in a small group (20) will have a greater impact than the same number of individuals (5) in a large group (200).

Graph 310: Ford County Visitor RSC Greater Than 10 Percent, 2001



Source: Data from Implan, calculations by the author.

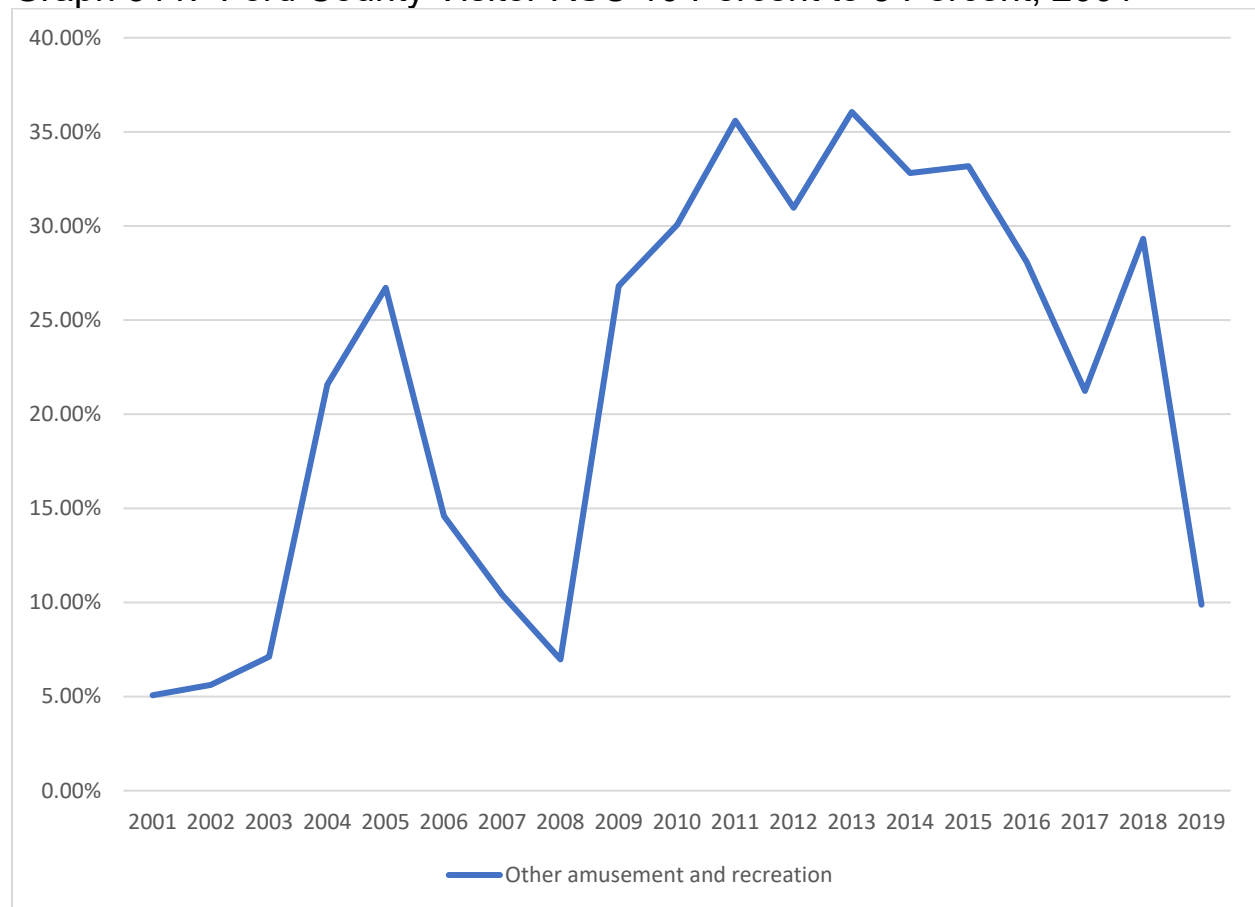
Tables 37 through 39 provide the actual RSC values for each sector in 2001. So, for instance, racing and track operation services are provided in Ford County, but no local resident utilized them. Therefore, only visitors consumed (or used) these services in 2001.

Table 37: Ford County Visitor RSCs, 2001

Description	2001
Retail services - Miscellaneous store retailers	12.77%
Commercial sports except racing	17.84%
Retail services - Gasoline stores	29.36%
Limited-service restaurant services	37.20%
All other food and drinking place services	43.50%
Retail services - General merchandise stores	46.80%
Amusement parks and arcades	85.69%
Hotels and motel services, including casino hotels	99.98%
Other accommodation services	99.98%
Racing and track operation services	100.00%

Source: Data from Implan, calculations by the author.

Graph 311: Ford County Visitor RSC 10 Percent to 5 Percent, 2001



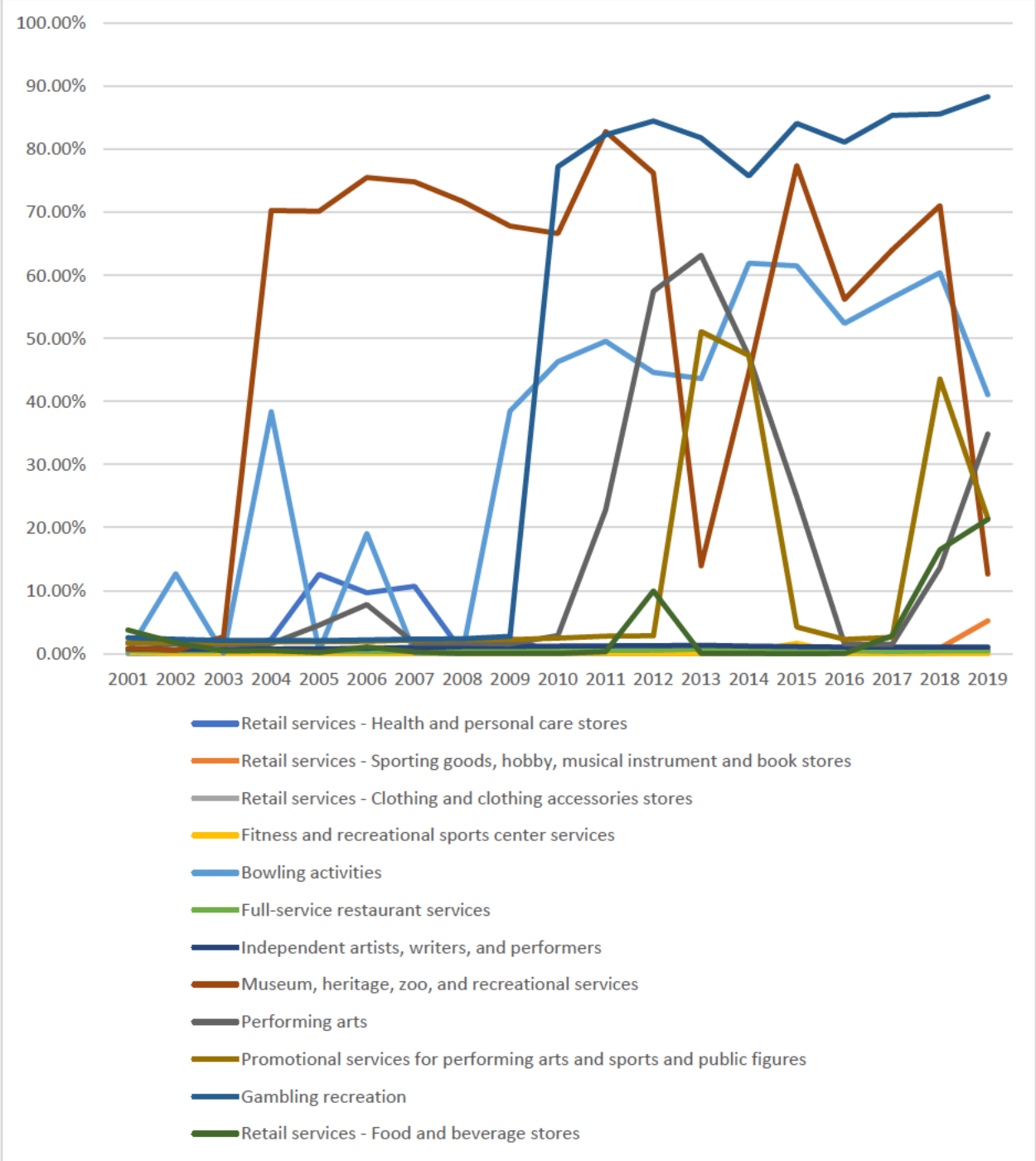
Source: Data from Implan, calculations by the author.

Table 38: Ford County Visitor RSCs, 2001

Description	2001
Other amusement and recreation	5.07%

Source: Data from Implan, calculations by the author.

Graph 312: Ford County Visitor RSC Less Than 5 Percent, 2001



Source: Data from Implan, calculations by the author.

Graph 312 shows a substantial decline starting in 2018 in the visitor RSC for museum, heritage, zoo, and recreational services perhaps due to ongoing renovation.

Table 39: Ford County Visitor RSCs, 2001

Description	2001
Retail services - Health and personal care stores	0.03%
Retail services - Sporting goods, hobby, musical instrument and book stores	0.06%
Retail services - Clothing and clothing accessories stores	0.08%
Fitness and recreational sports center services	0.18%
Bowling activities	0.21%
Full-service restaurant services	0.46%
Independent artists, writers, and performers	0.74%
Museum, heritage, zoo, and recreational services	0.81%
Performing arts	1.64%
Promotional services for performing arts and sports and public figures	1.77%
Gambling recreation	2.52%
Retail services - Food and beverage stores	3.74%

Source: Data from Implan, calculations by the author.

Table 40 provides a list of all the visitor RSCs utilized for Ford County and their respective values for 2001 and 2019. This data is derived from the Implan economic modelling software and data. Implan uses a simplified business coding system rather than NAICS. As might be expected, visitors are the largest consumers of hotels and motel services and other accommodation services. Given the rather isolated location of Dodge City other traveler services, such as gasoline stores and limited service restaurants are also popular.

Table 40: Ford County Visitor RSCs, 2001 and 2019

Description	2001	2019
Retail services - Health and personal care stores	0.03%	0.57%
Retail services - Sporting goods, hobby, musical instrument and book stores	0.06%	5.20%
Retail services - Clothing and clothing accessories stores	0.08%	0.04%
Fitness and recreational sports center services	0.18%	0.03%
Bowling activities	0.21%	41.09%
Full-service restaurant services	0.46%	0.44%
Independent artists, writers, and performers	0.74%	1.04%
Museum, heritage, zoo, and recreational services	0.81%	12.64%
Performing arts	1.64%	34.84%
Promotional services for performing arts and sports and public figures	1.77%	21.47%
Gambling recreation	2.52%	88.36%
Retail services - Food and beverage stores	3.74%	21.31%
Other amusement and recreation	5.07%	9.88%
Retail services - Miscellaneous store retailers	12.77%	1.46%
Commercial sports except racing	17.84%	1.06%
Retail services - Gasoline stores	29.36%	55.66%
Limited-service restaurant services	37.20%	33.64%
All other food and drinking place services	43.50%	0.38%
Retail services - General merchandise stores	46.80%	44.25%
Amusement parks and arcades	85.69%	23.90%
Hotels and motel services, including casino hotels	99.98%	99.99%
Other accommodation services	99.98%	99.99%
Racing and track operation services	100.00%	1.69%

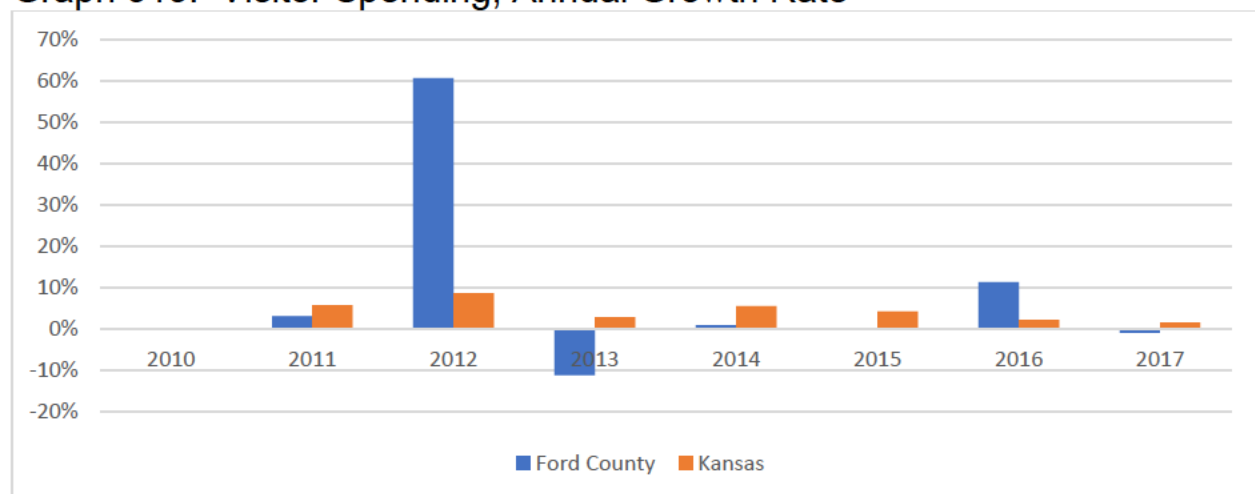
Source: Data from Implan, calculations by the author.



## Ford County Tourism

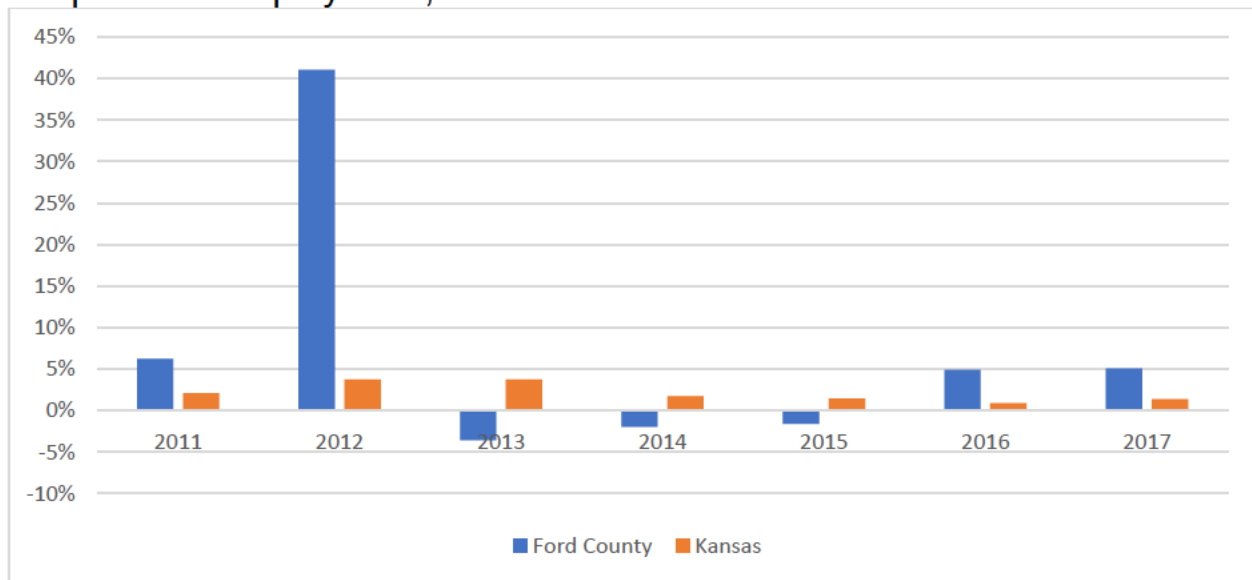
The graphs in this section are based on data from annual publications of the Kansas Department of Wildlife, Parks, and Tourism. We use the annual growth rate to compare Ford County's data with the Kansas data because it allows analysis when there are large differences in the scale of the underlying data. However, as previously discussed, smaller groups inherently have greater volatility. Ford County is the smallest county that we examined.

**Graph 313: Visitor Spending, Annual Growth Rate**



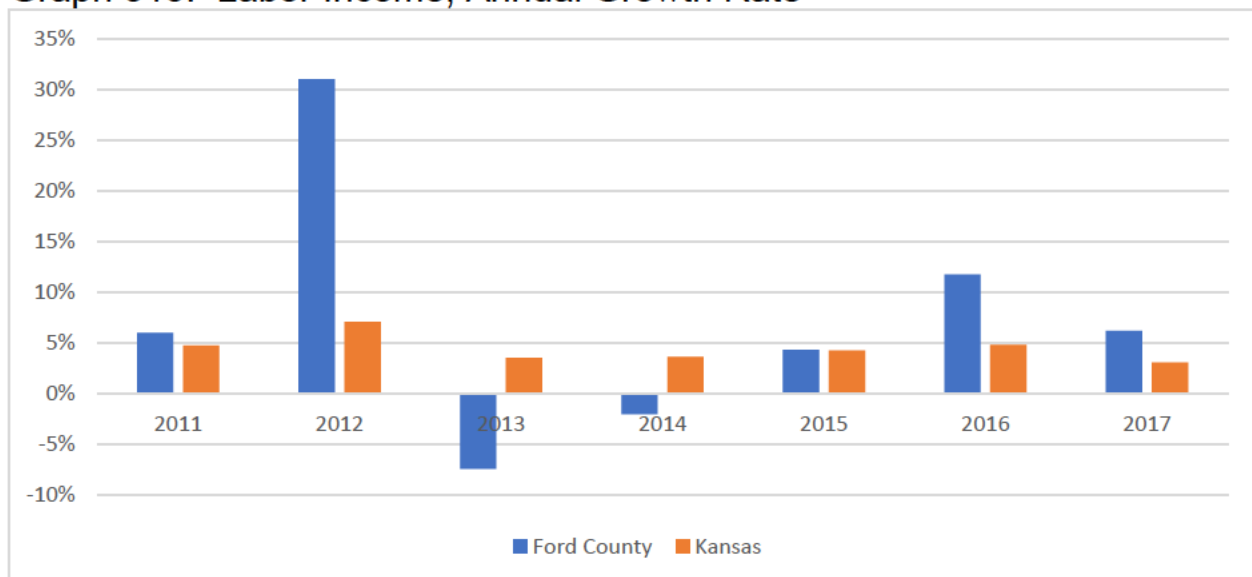
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

Graph 314: Employment, Annual Growth Rate



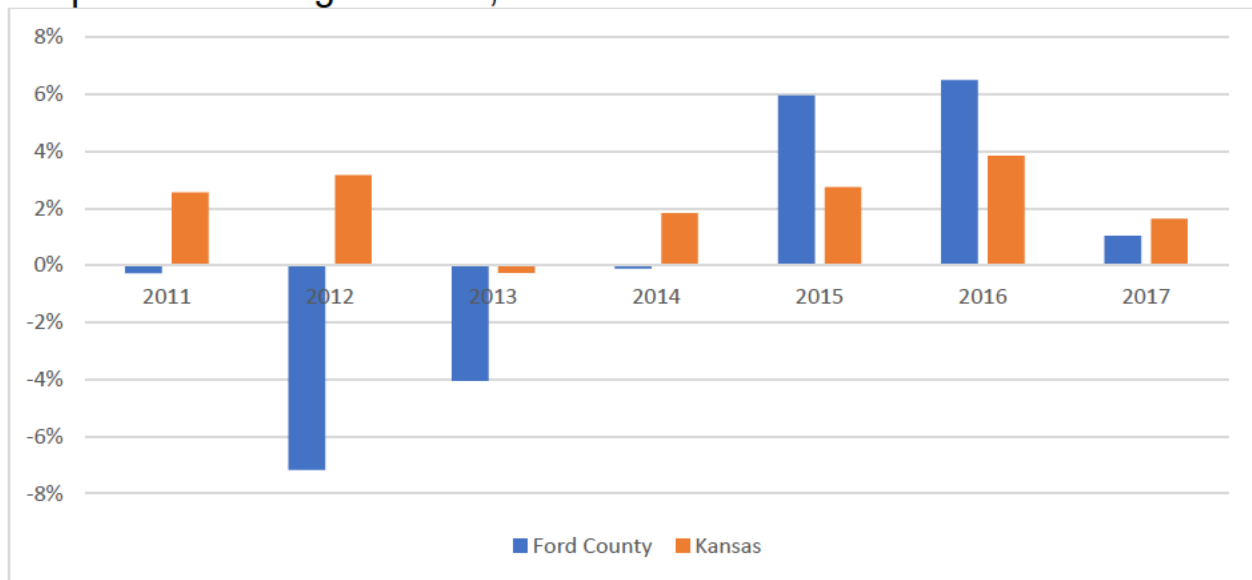
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

Graph 315: Labor Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

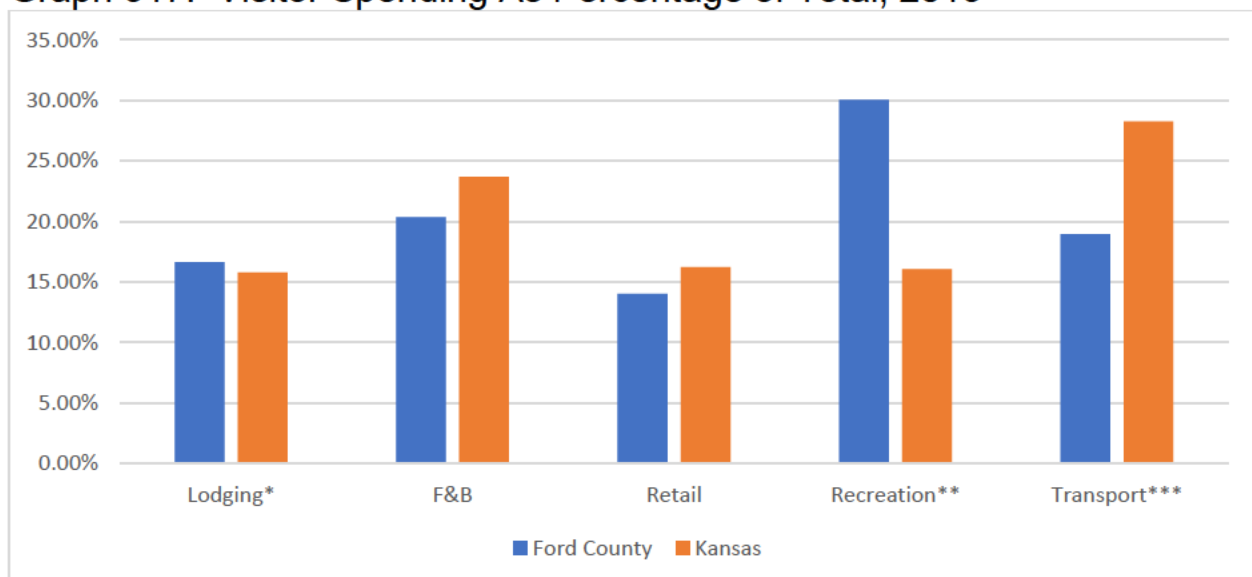
Graph 316: Average Income, Annual Growth Rate



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

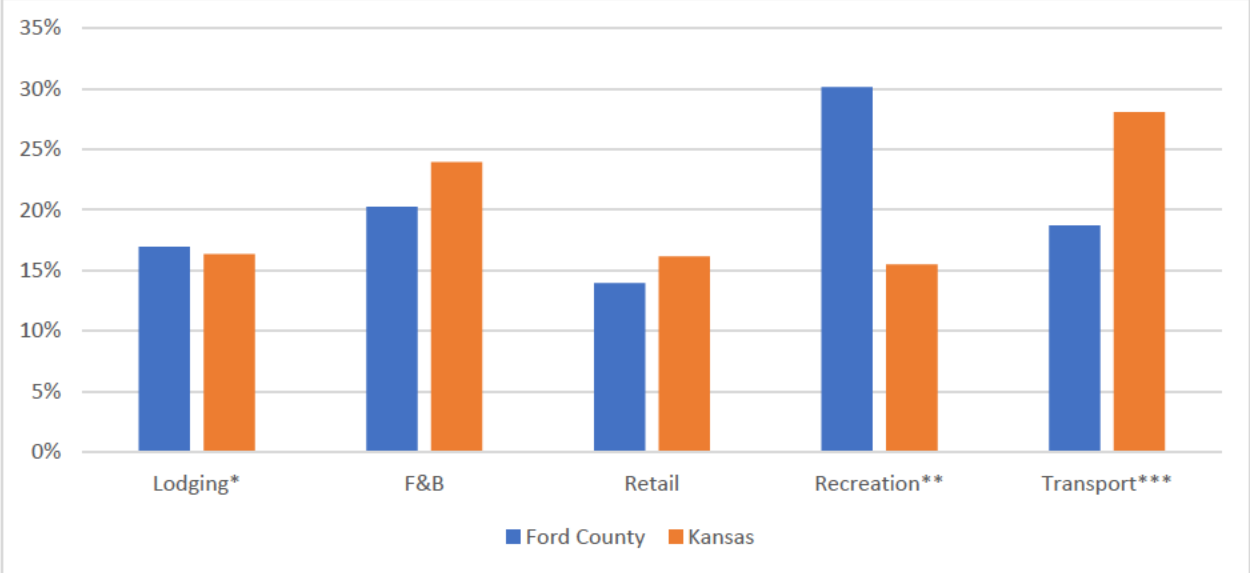
Graphs 317 through 319 show that in the county visitor spending for lodging and for recreation are consistently above the Kansas percentage of total.

Graph 317: Visitor Spending As Percentage of Total, 2013



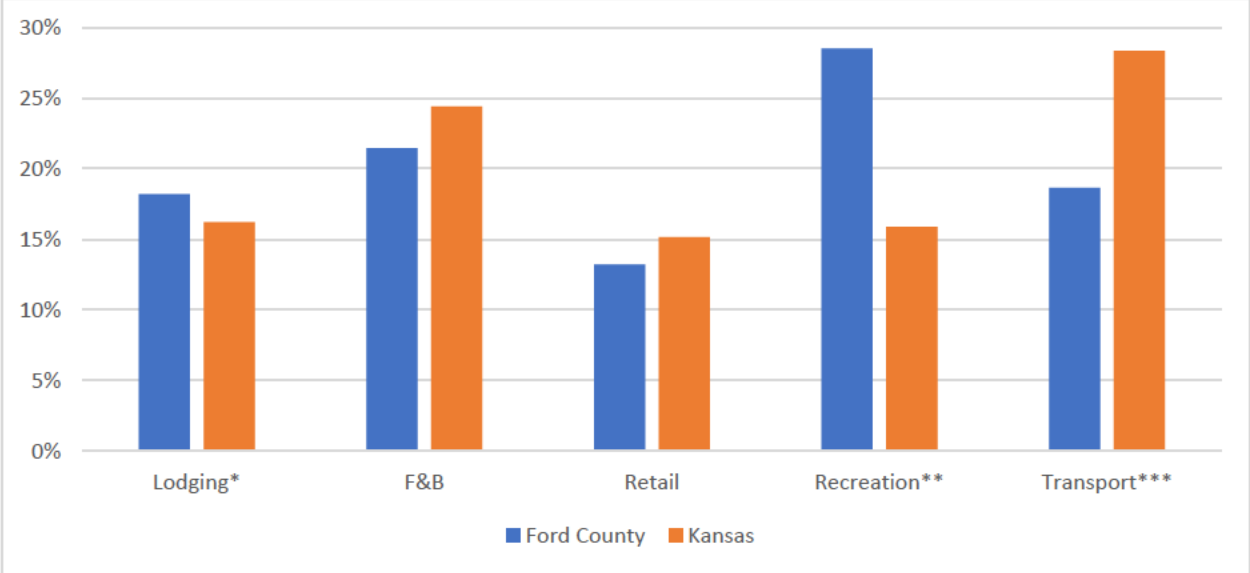
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

Graph 318: Visitor Spending As Percentage of Total, 2015



Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

Graph 319: Visitor Spending As Percentage of Total, 2017



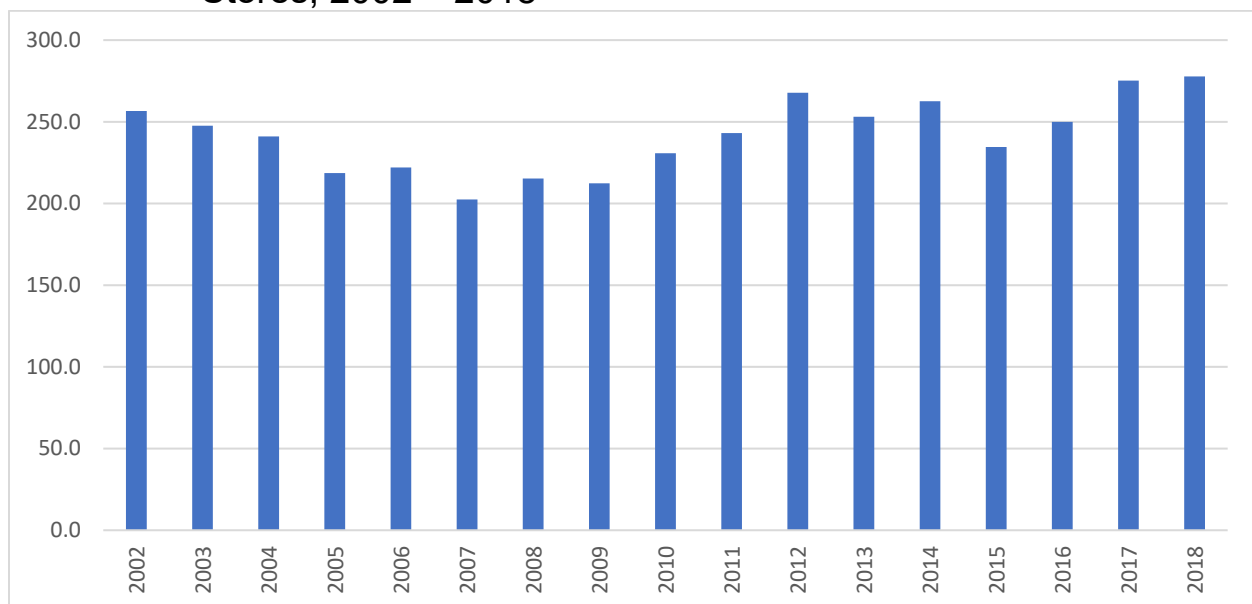
Source: Data from Kansas Department of Wildlife, Parks, and Tourism, calculations by the author.

## Dodge City Labor Data by NAICS and ZIP

The graphs in this section show the average annual number of employees, the average wage, and the total wages by three digit NAICS code for all the businesses within the code category that were doing business in ZIP code 67801 from 2002 through 2018. The data for 2019 was incomplete. The underlying data is collected by the Kansas Department of Labor on a monthly basis which we converted to annual data.

Graph 320 shows that the number of employees at food and beverage stores in ZIP 67801 has gradually increased from slightly more than 250 to approximately 275 people. During that time period it also dipped as low as 200 employees which reflects the normal ebb and flow of retail business through time.

**Graph 320: ZIP 67801, Average Number of Employees, Food & Beverage Stores, 2002 – 2018**

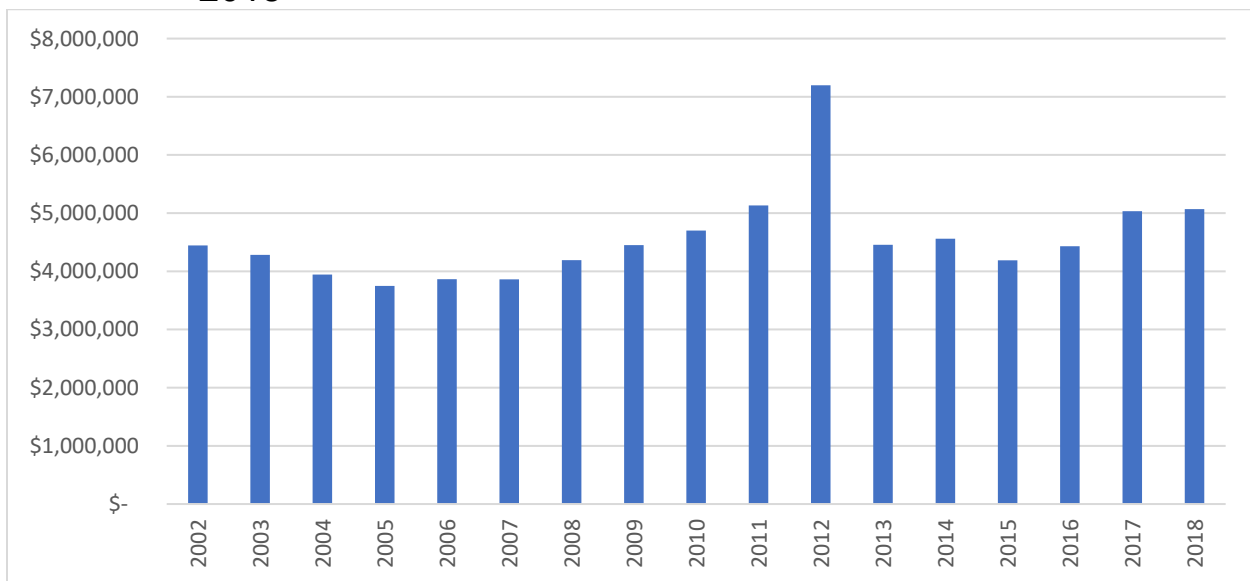


Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 321 shows that there were higher than usual total wages for employees of food and beverage stores in 2012. Graph 322 shows that the average wage for

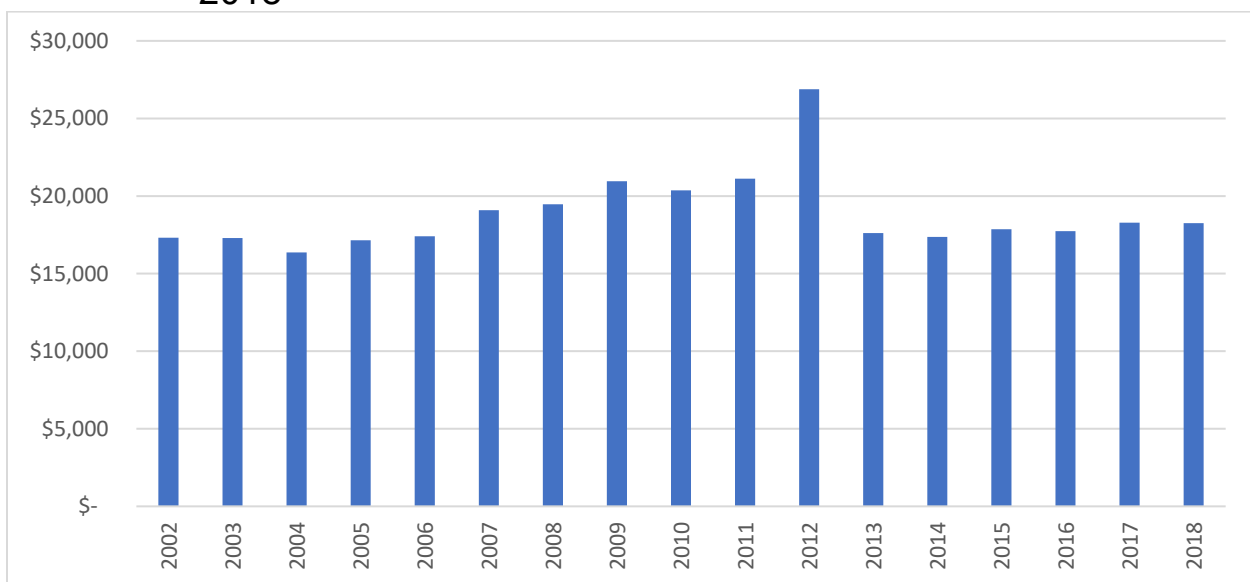
these employees was also elevated in 2012. However, the average wage, as well as, the number of employees in food and beverage stores was relatively stable over the entire time period.

Graph 321: ZIP 67801, Total Wages, Food & Beverage Stores, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

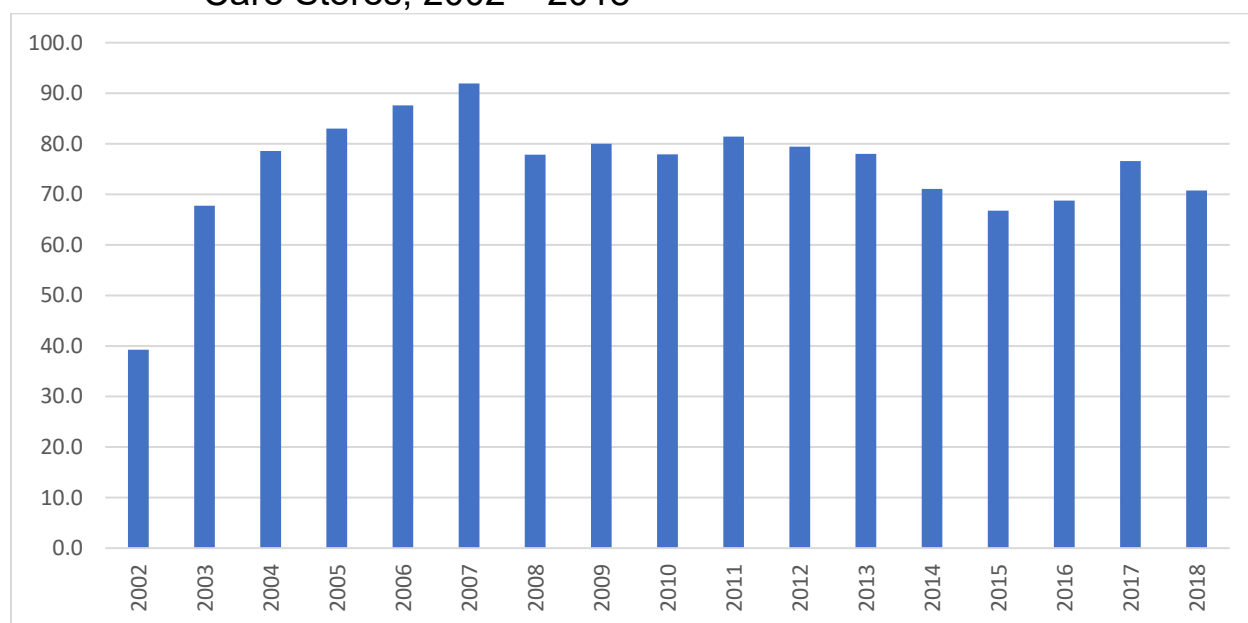
Graph 322: ZIP 67801, Average Wage, Food & Beverage Stores, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graphs 323 through 325 focus on health and personal care stores in ZIP 67801. Graph 323 shows that from 2002 through 2007 there was a more than doubling in the number of employees. From 2007 through 2015 there was a decrease in employees followed by a bit of an increase. Again, the pattern seems to reflect business conditions in a smaller isolated market.

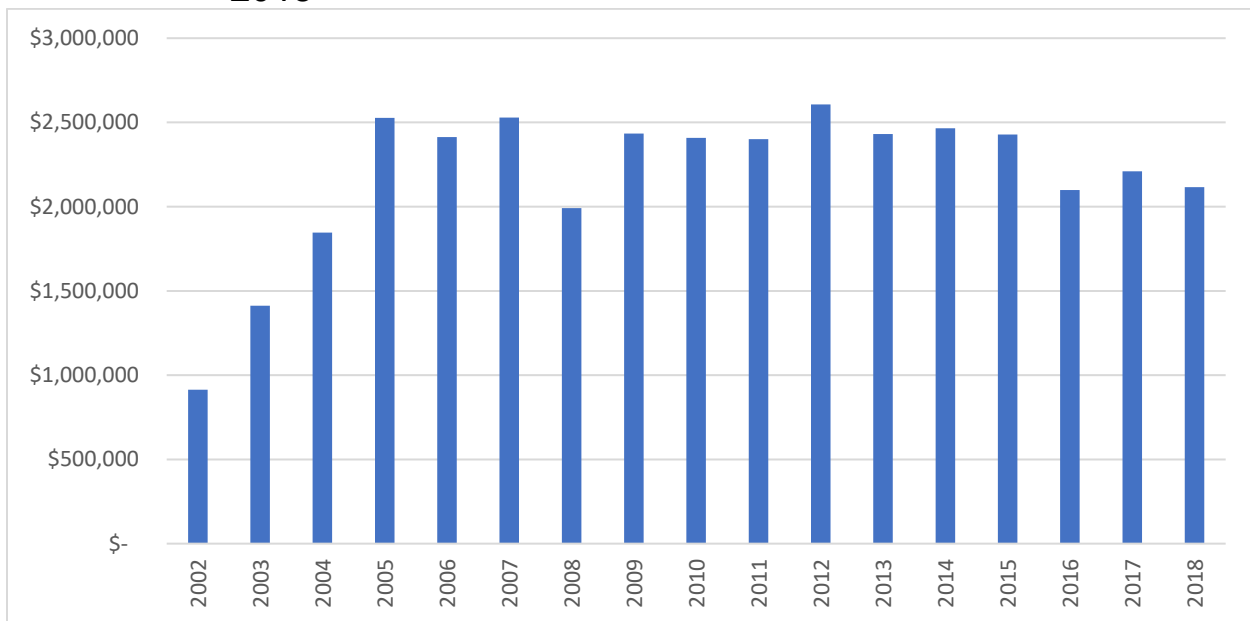
Graph 323: ZIP 67801, Average Number of Employees, Health & Personal Care Stores, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

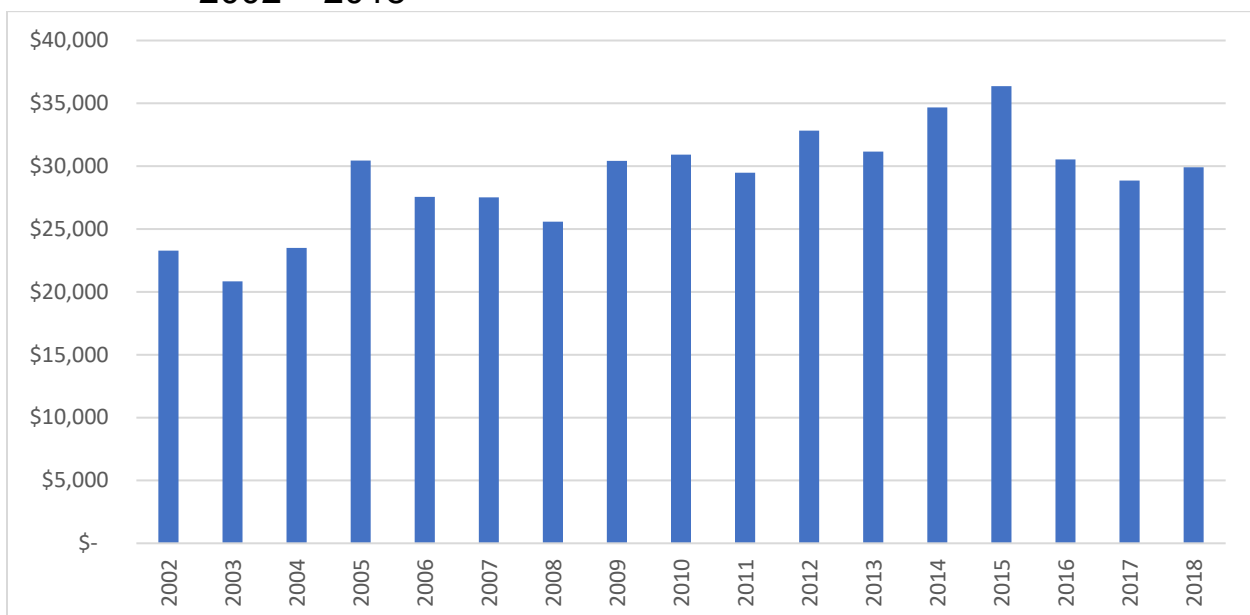
Total wages for employees in health and personal care stores, Graph 324, follows the same pattern as the number of employees. Graph 325 shows that the average wage is smoother and follows an upward sloping trend, although 2016 through 2018 have decreased.

**Graph 324: ZIP 67801, Total Wages, Health & Personal Care Stores, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 325: ZIP 67801, Average Wage, Health & Personal Care Stores, 2002 – 2018**

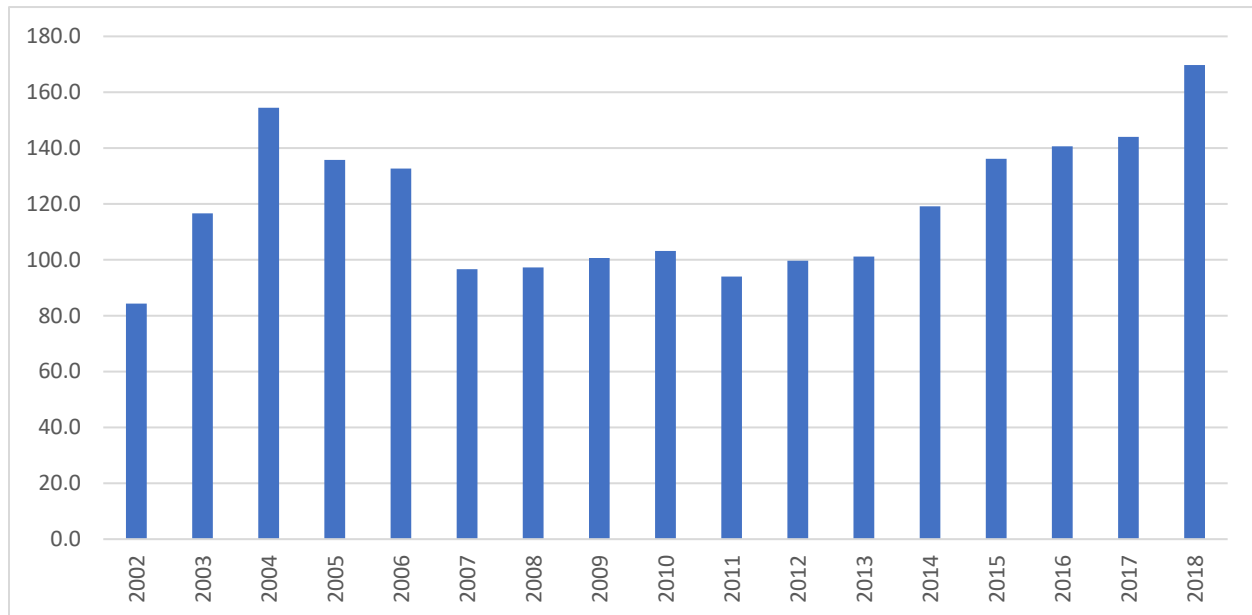


Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute



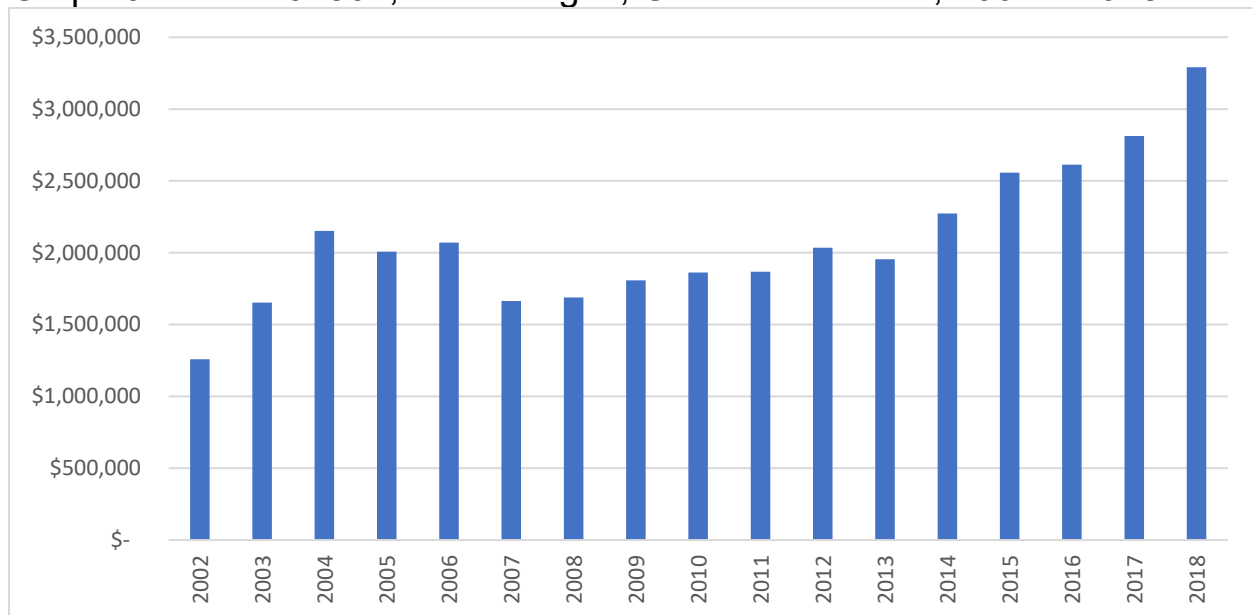
Graph 326 shows that the number of employees at gasoline stations has increased since 2001. The increase from 2017 to 2018 was 25 people. Total wages as shown in graph 327 follow the same general pattern, while the average wage for 2018 is just below \$19,400.

Graph 326: ZIP 67801, Average Number of Employees, Gasoline Stations, 2002 – 2018



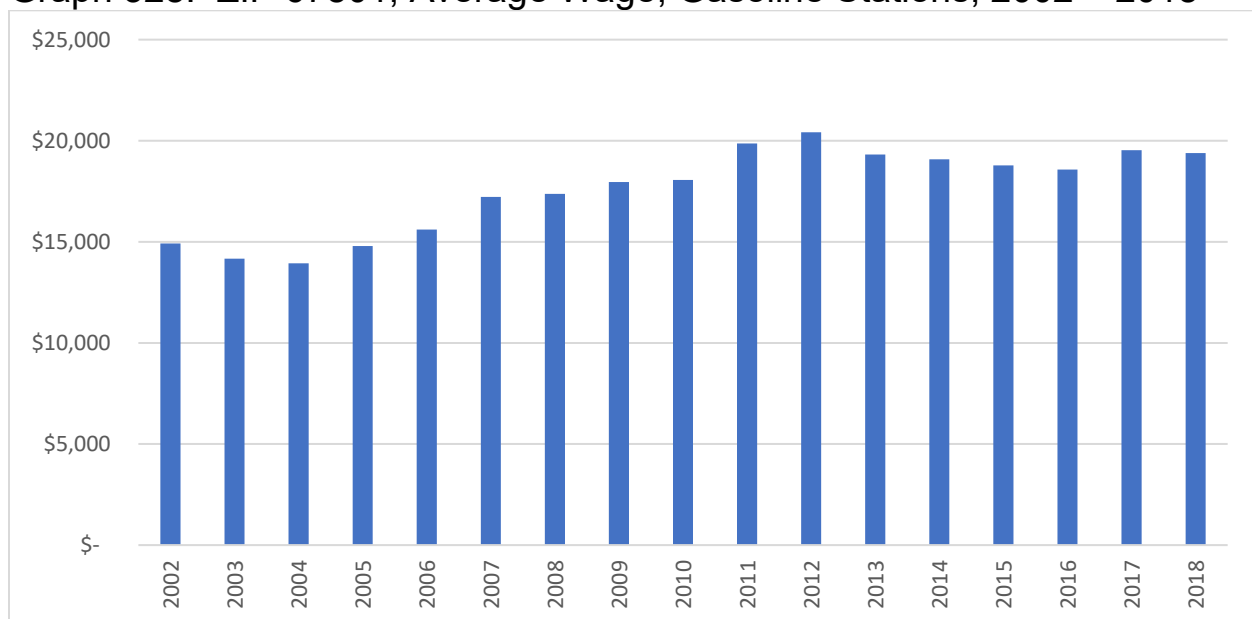
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 327: ZIP 67801, Total Wages, Gasoline Stations, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 328: ZIP 67801, Average Wage, Gasoline Stations, 2002 – 2018

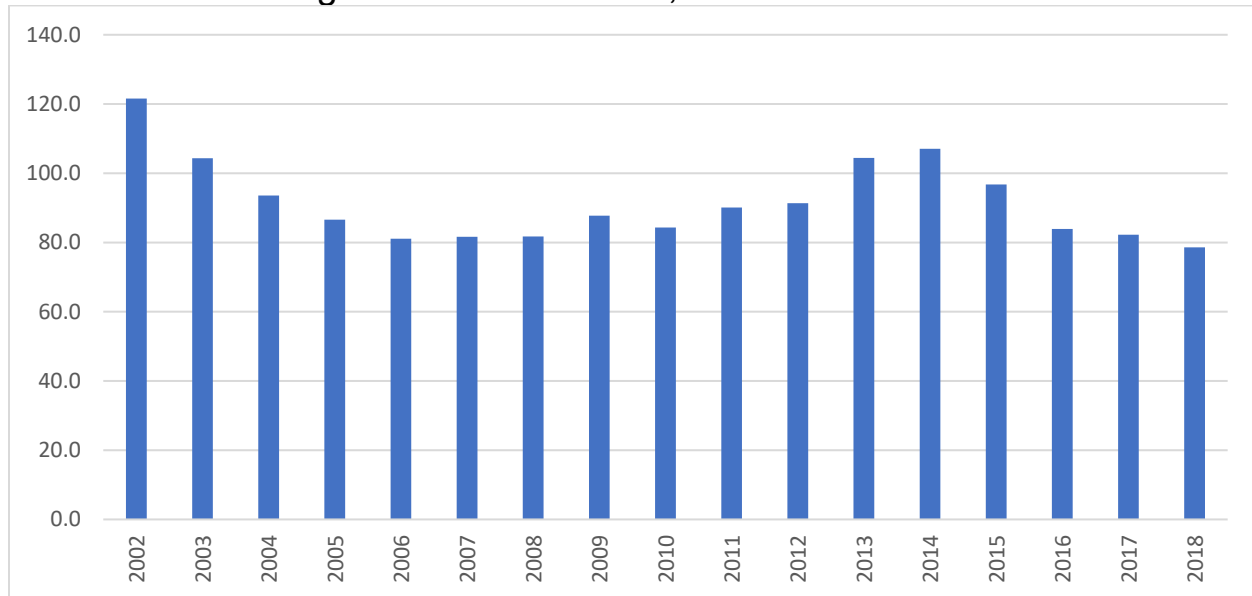


Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graphs 329 through 331 reveal that clothing and clothing accessories stores have trended downward when measured by number of employees. There were

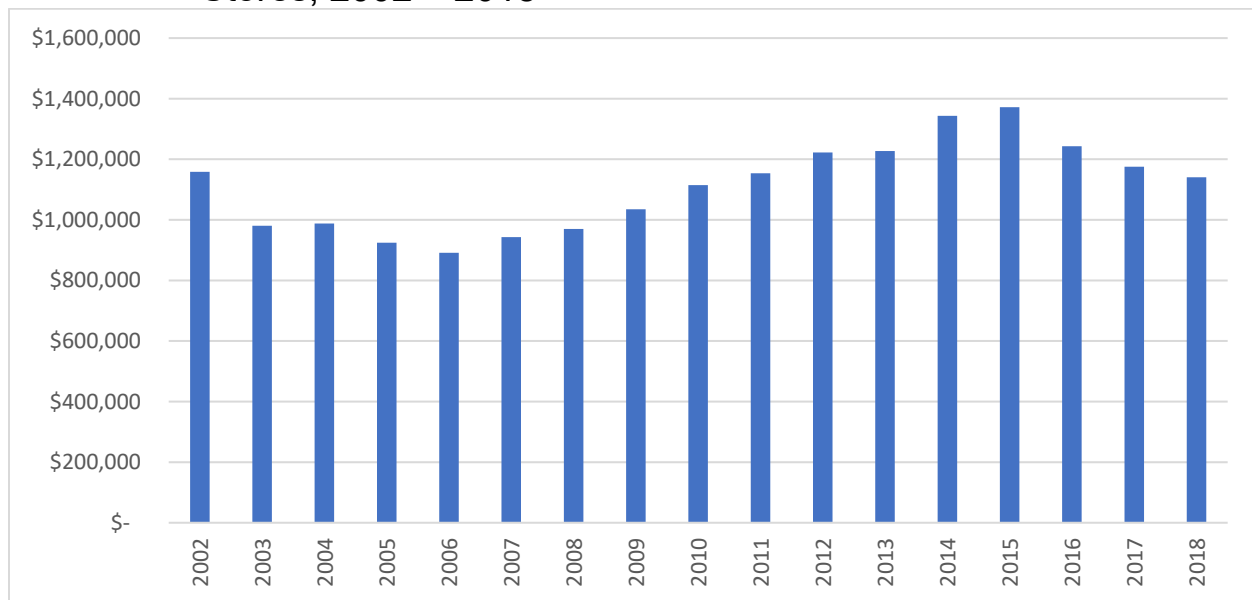
121 employees in 2002 and only 79 in 2018. However, the average wage has trended upward over the same time.

**Graph 329: ZIP 67801, Average Number of Employees, Clothing & Clothing Accessories Stores, 2002 – 2018**



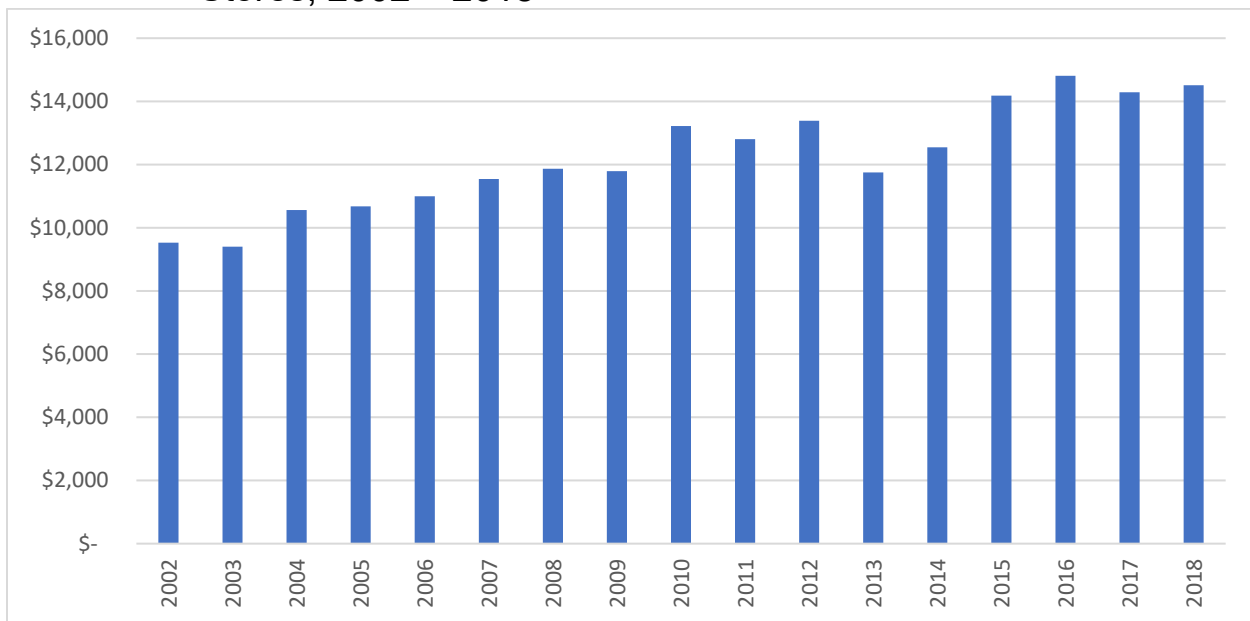
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 330: ZIP 67801, Total Wages, Clothing & Clothing Accessories Stores, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

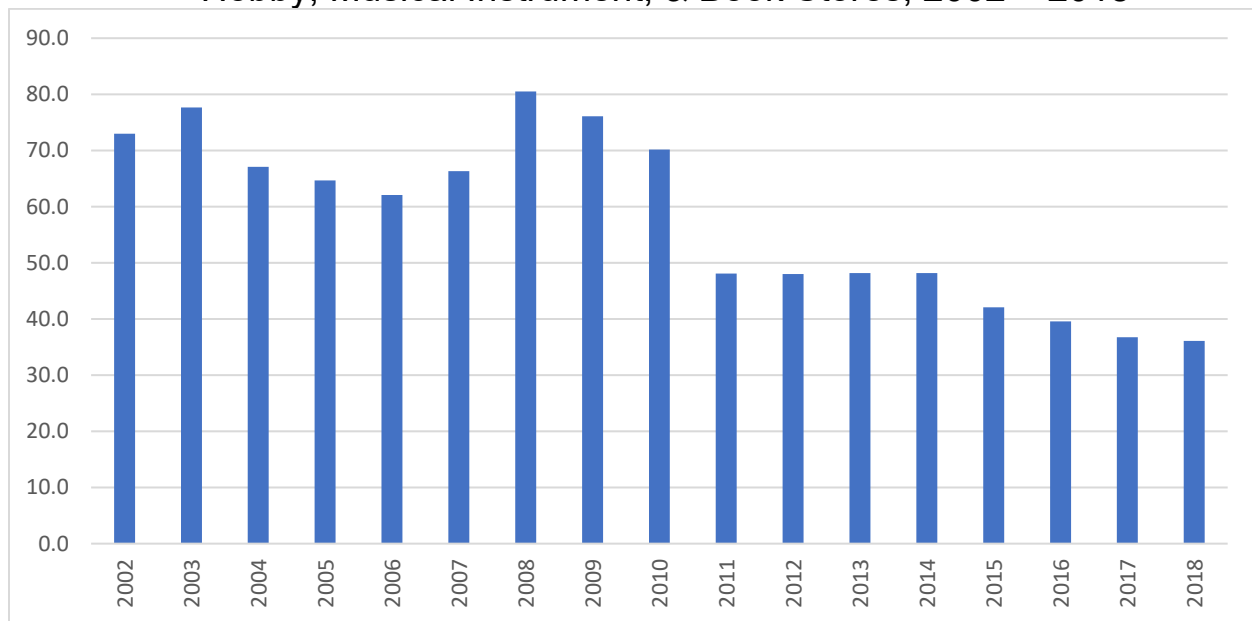
Graph 331: ZIP 67801, Average Wage, Clothing & Clothing Accessories Stores, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

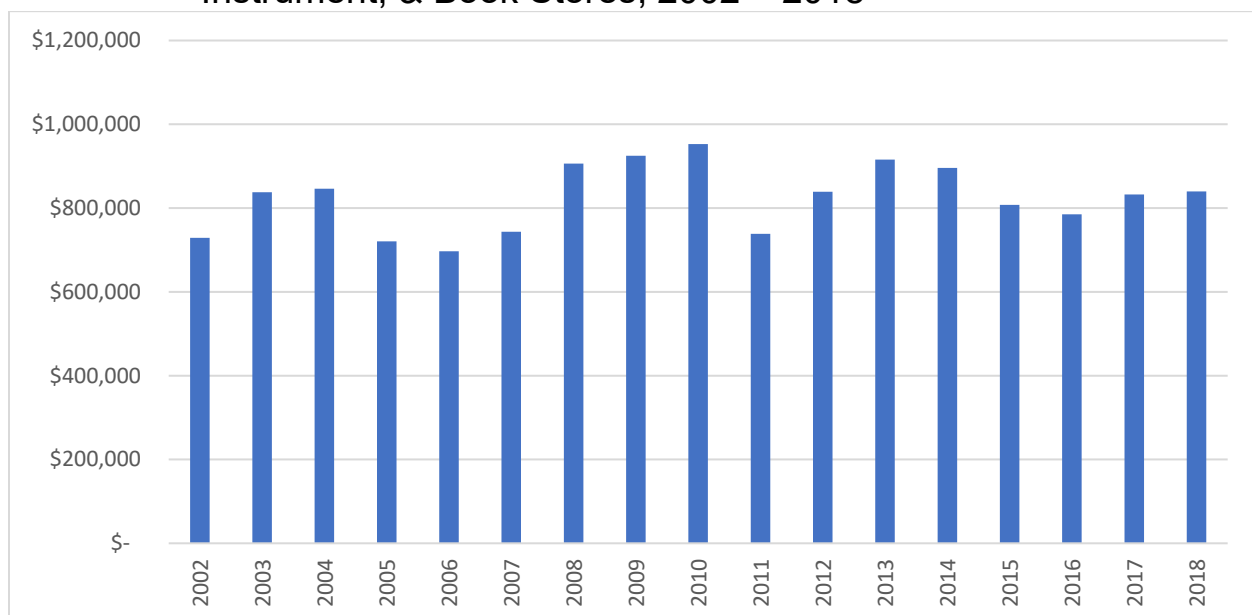
Graphs 332 through 334 show that in ZIP 67801 the number of employees in the broad sector of sporting goods, hobby, musical instruments, and book stores has followed a downward trend over the period from 2002 through 2018. There are occasional years with an increase in the number of employees, but for the entire period the number of employees decreased from 73 people to 36 people. Graph 334 shows that for these 36 people the average wage is over \$23,000 in 2018.

**Graph 332: ZIP 67801, Average Number of Employees, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



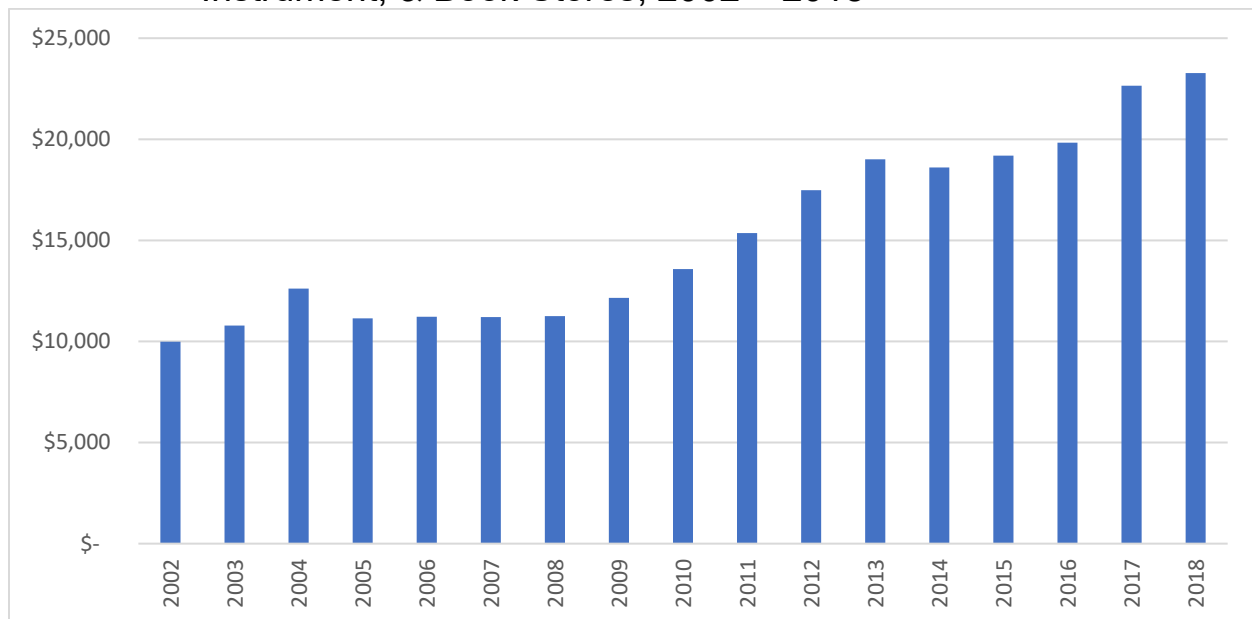
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 333: ZIP 67801, Total Wages, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

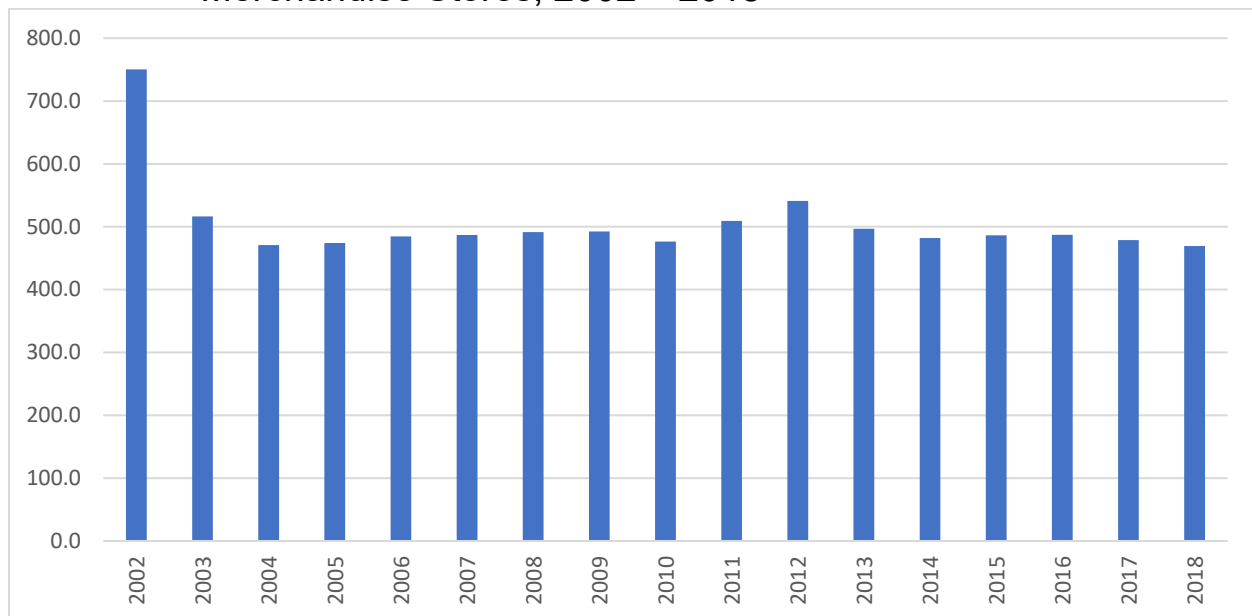
Graph 334: ZIP 67801, Average Wage, Sporting Goods, Hobby, Musical Instrument, & Book Stores, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

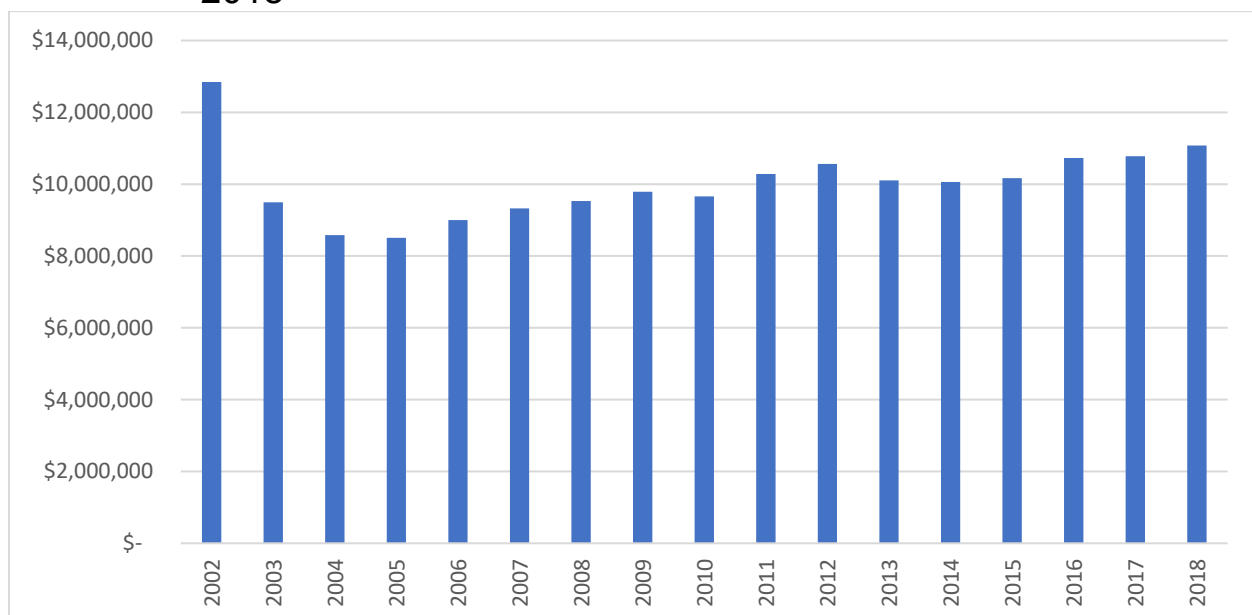
Graph 335 shows that the number of employees at general merchandise stores in ZIP 67801 had a significant drop between 2002 and 2003, but that since then the number has only declined slightly overall. Total wages for this sector in 2018 were over \$11,000,000 as shown in Graph 336. Graph 337 shows that the average wage has increased since 2012.

**Graph 335: ZIP 67801, Average Number of Employees, General Merchandise Stores, 2002 – 2018**



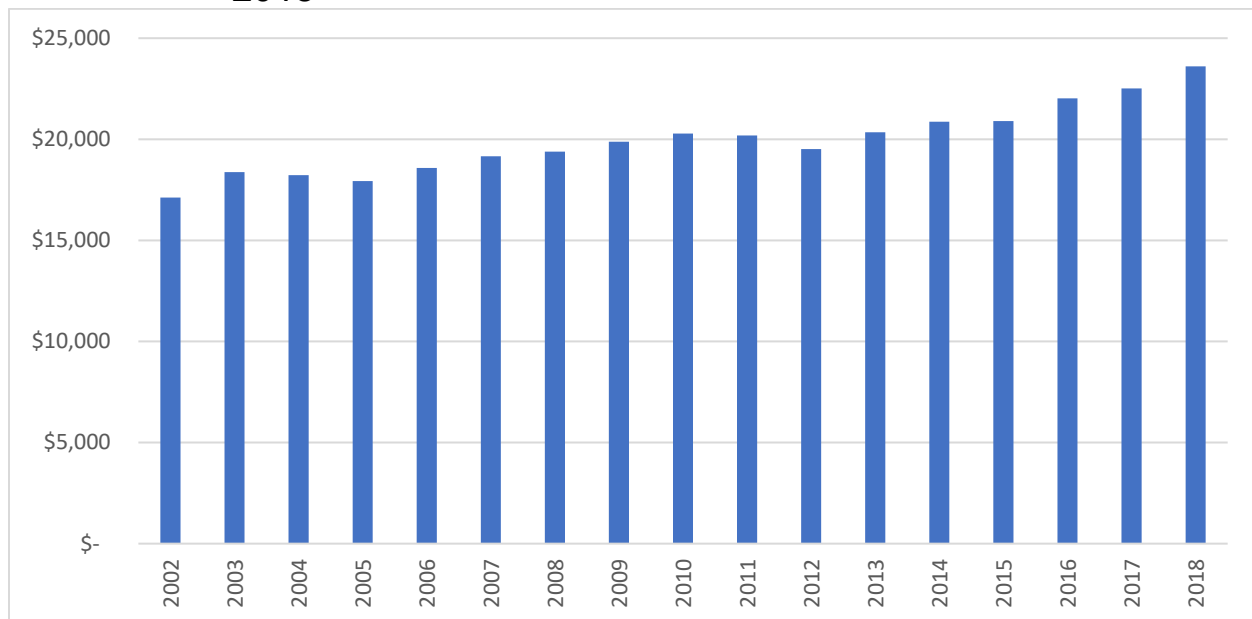
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 336: ZIP 67801, Total Wages, General Merchandise Stores, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 337: ZIP 67801, Average Wage, General Merchandise Stores, 2002 – 2018

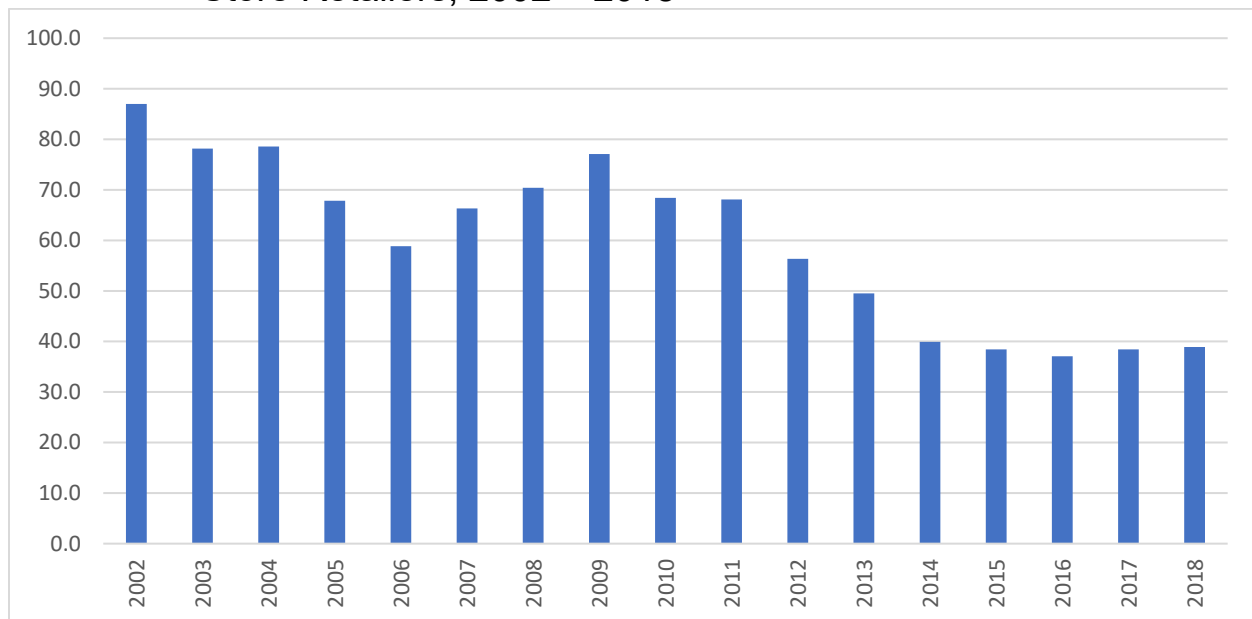


Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 338 through 340 show the now familiar pattern of a small retail sector experiencing a general downward trend in number of employees. The pattern of total wages generally follows the trend in number of employees while the average wage often shows an upward sloping trend over time.

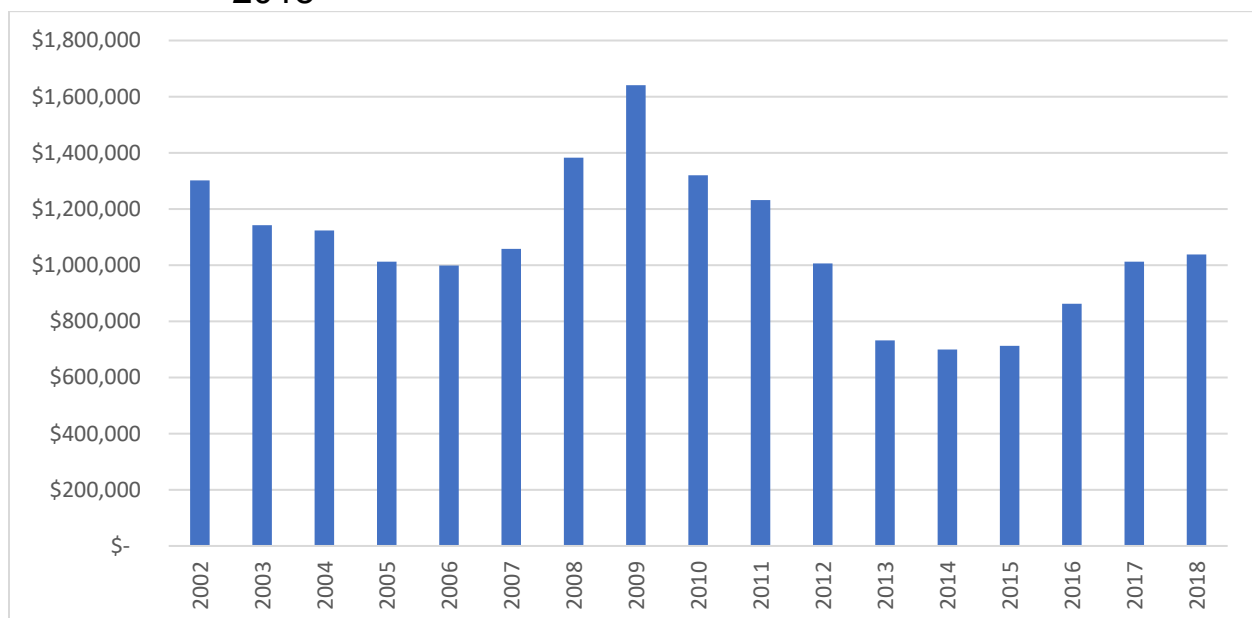


**Graph 338: ZIP 67801, Average Number of Employees, Miscellaneous Store Retailers, 2002 – 2018**



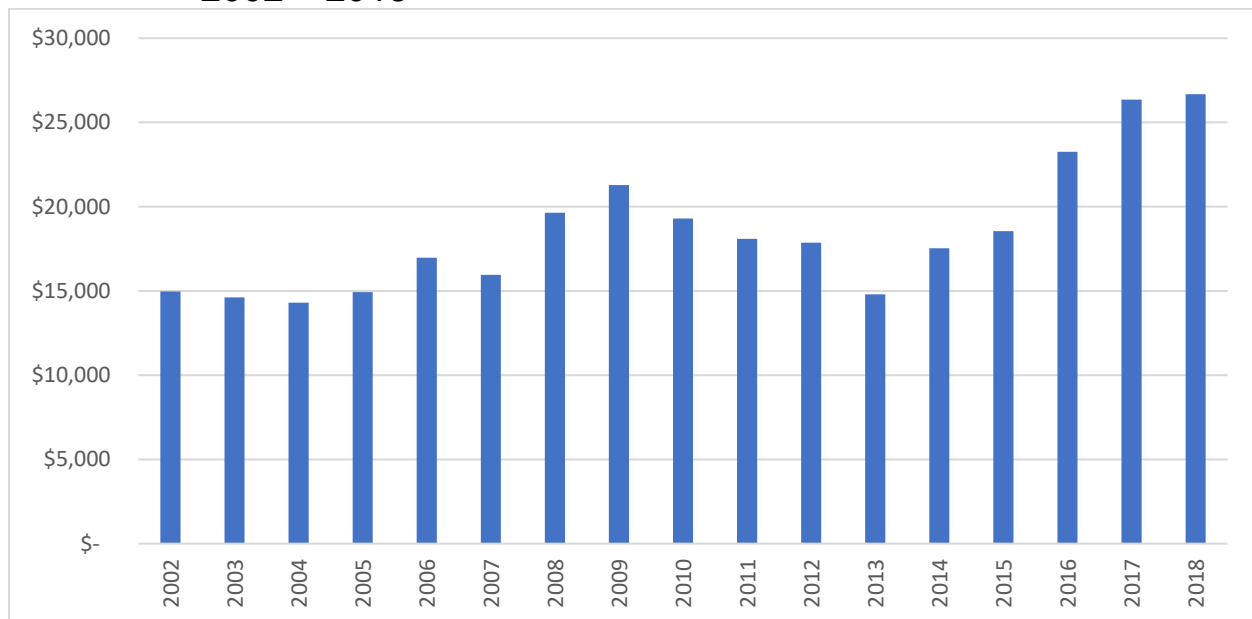
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 339: ZIP 67801, Total Wages, Miscellaneous Store Retailers, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

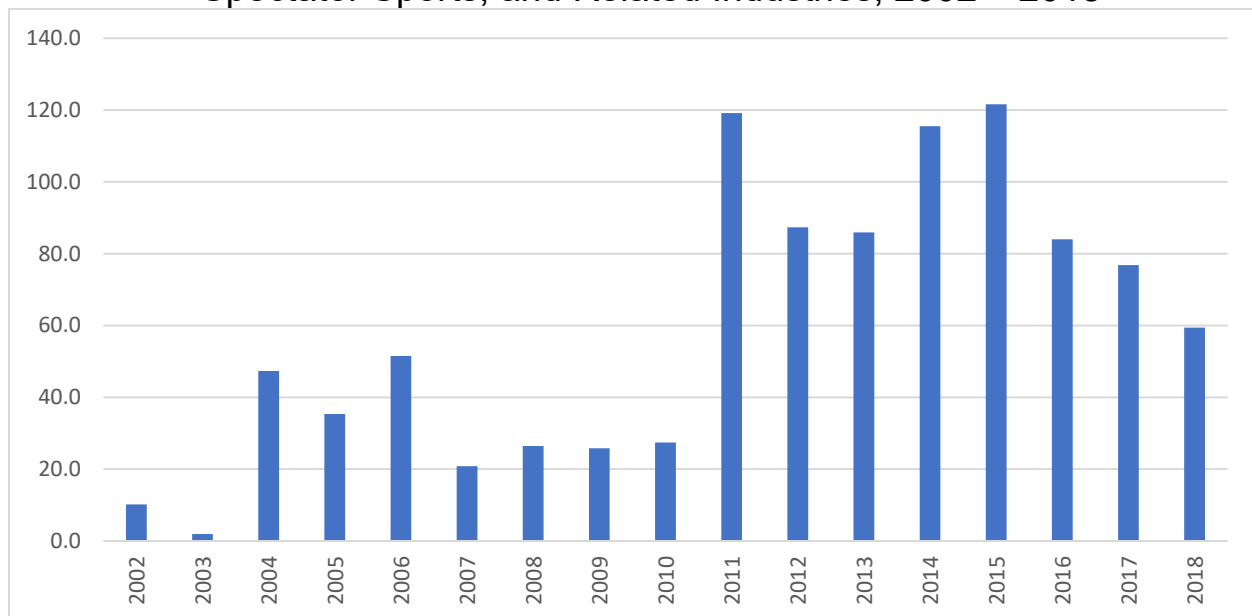
Graph 340: ZIP 67801, Average Wage, Miscellaneous Store Retailers, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

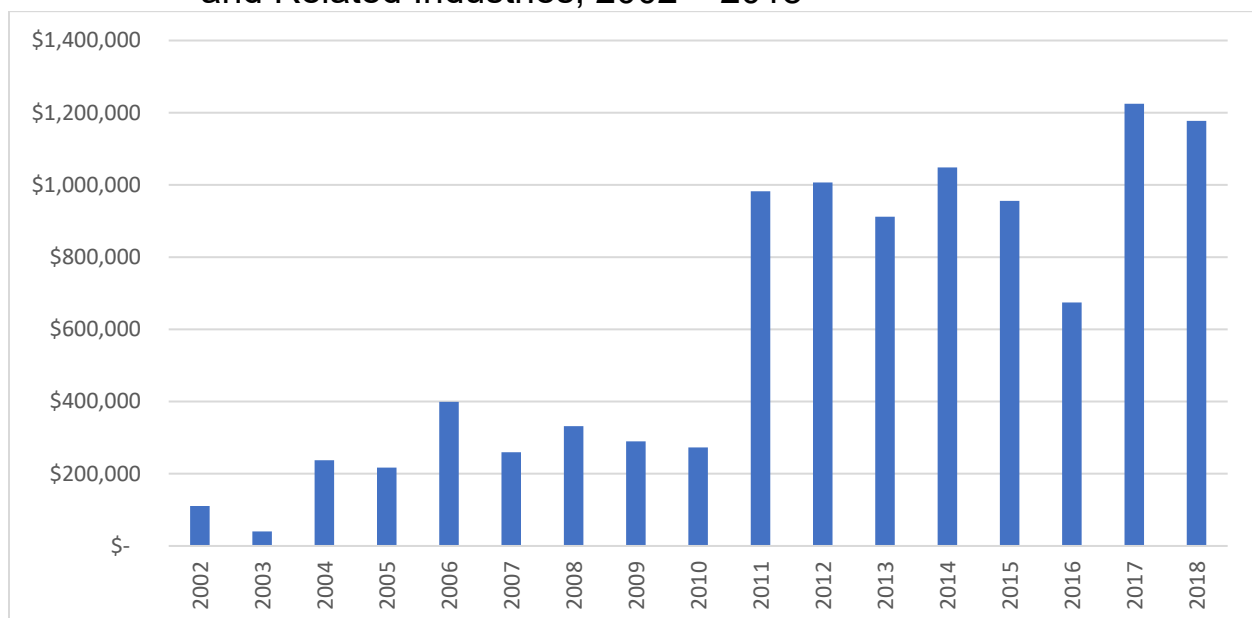
Graph 341 shows that the number of employees in the performing arts, spectator sports, and related industries before 2011 was much smaller than from 2011 through 2018. However, the number of employees has decreased by 50 percent since 2015. Graph 342 shows that total wages reflect the change that occurred in 2011. However, total wages have increased for the last two years compared with previous years.

**Graph 341: ZIP 67801, Average Number of Employees, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



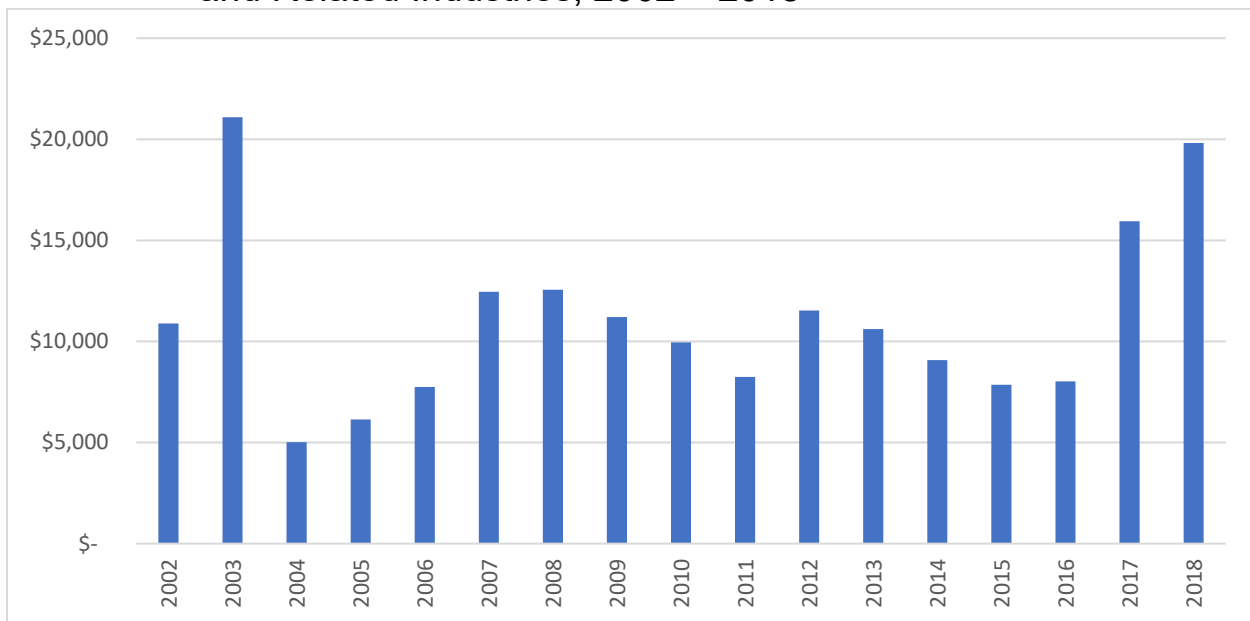
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 342: ZIP 67801, Total Wages, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

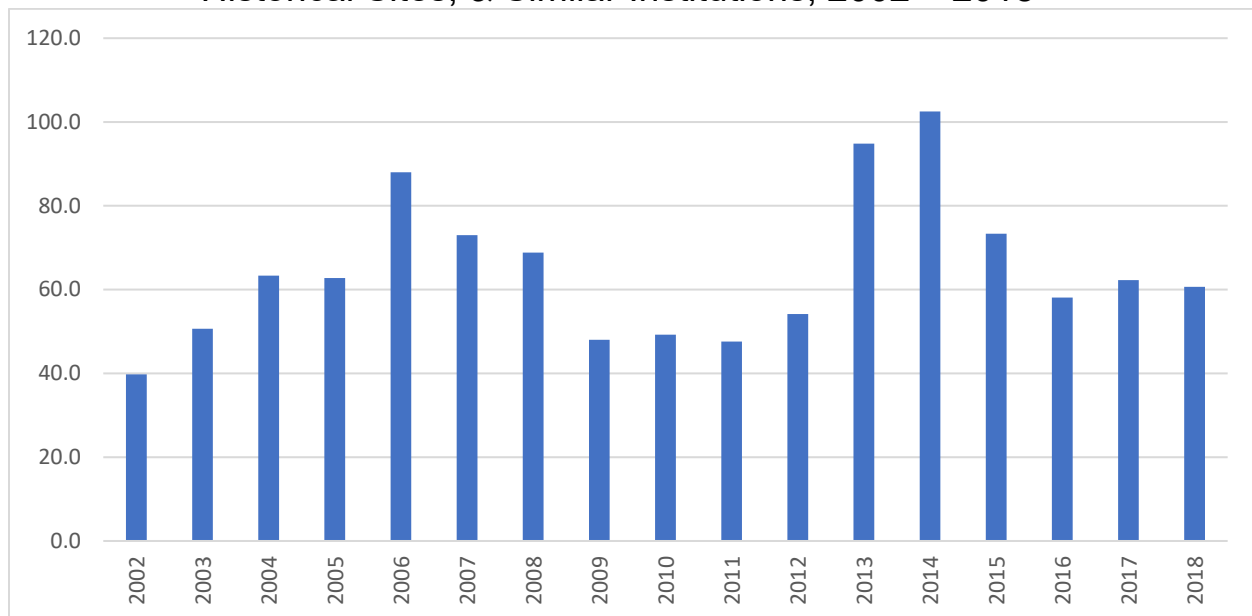
Graph 343: ZIP 67801, Average Wage, Performing Arts, Spectator Sports, and Related Industries, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

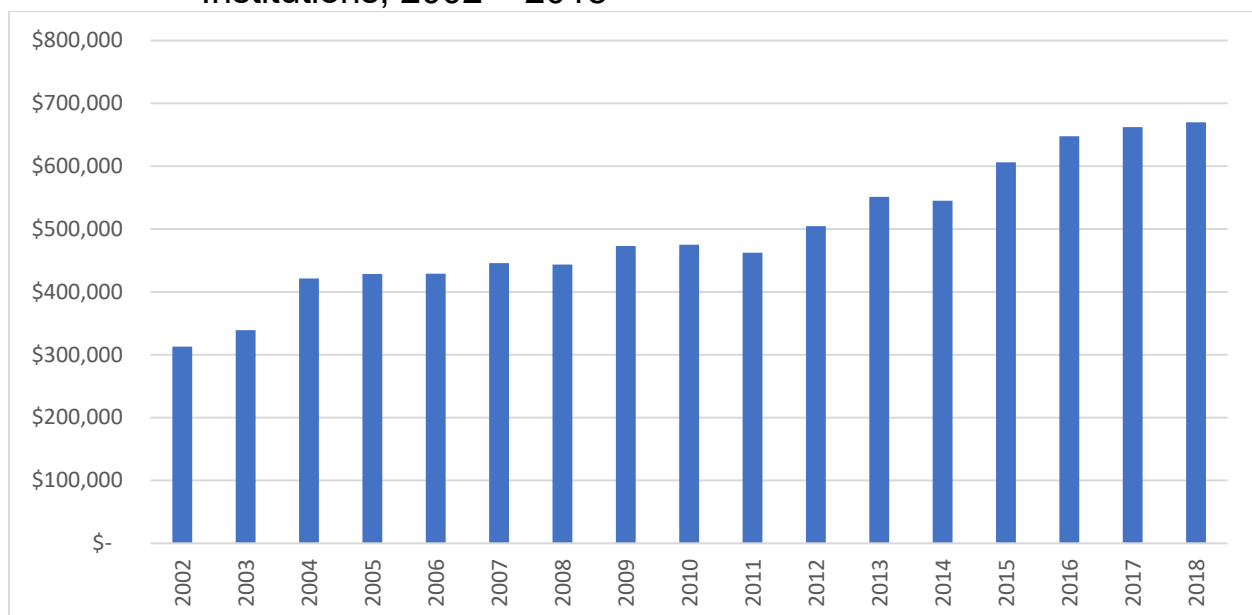
Graph 344 shows that the number of employees at museums, historical sites and similar institutions in ZIP 67801 has increased since 2002 when there were only 40 employees. Following the peak of slightly more than 100 employees in 2014 the number of employees has hovered around 60 people. During this time several facilities have been undergoing renovation as part of the Heritage STAR project. Graph 345 shows that despite the decline in employment, total wages have increased for the past five years.

**Graph 344: ZIP 67801, Average Number of Employees, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



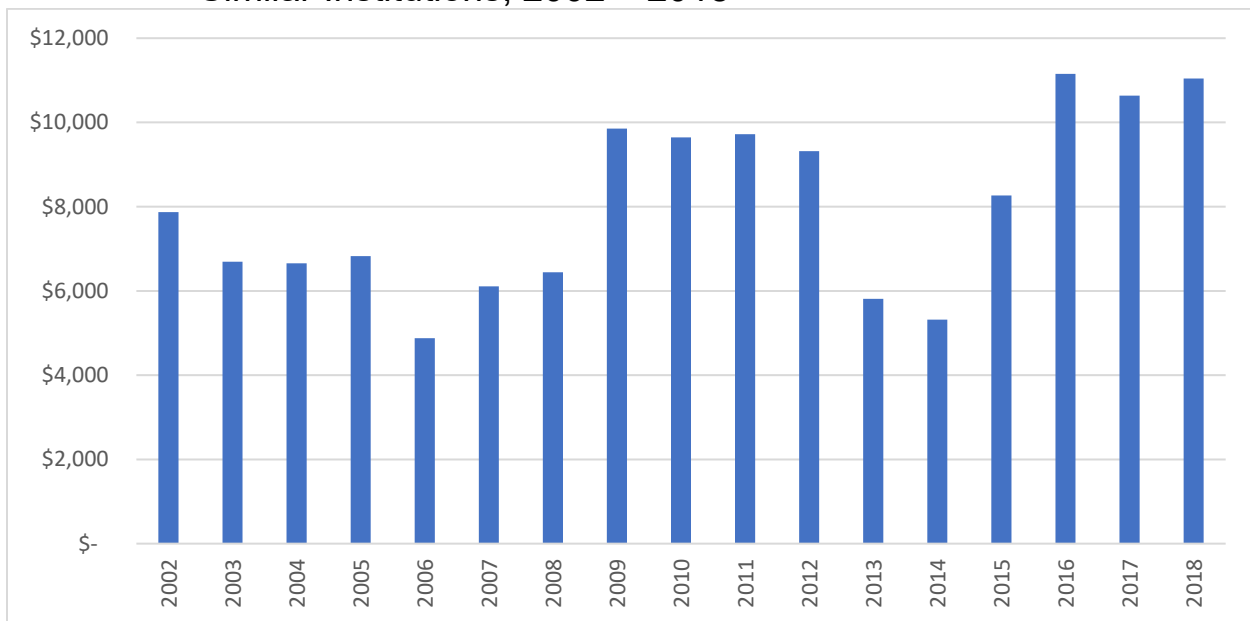
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 345: ZIP 67801, Total Wages, Museums, Historical Sites, & Similar Institutions, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

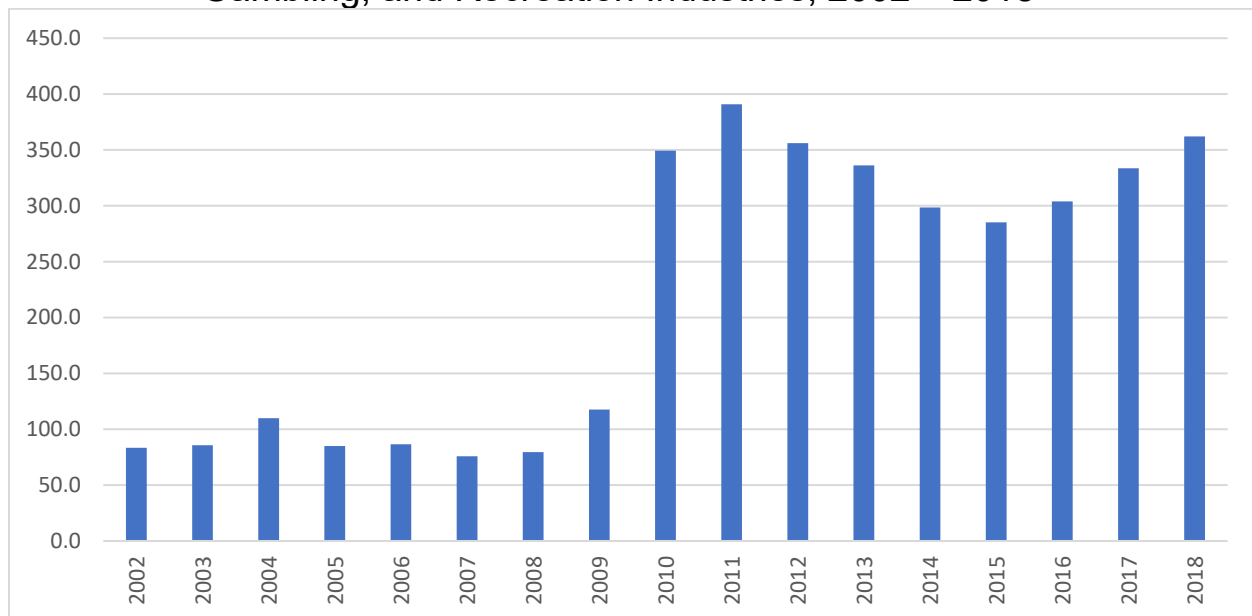
Graph 346: ZIP 67801, Average Wage, Museums, Historical Sites, & Similar Institutions, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

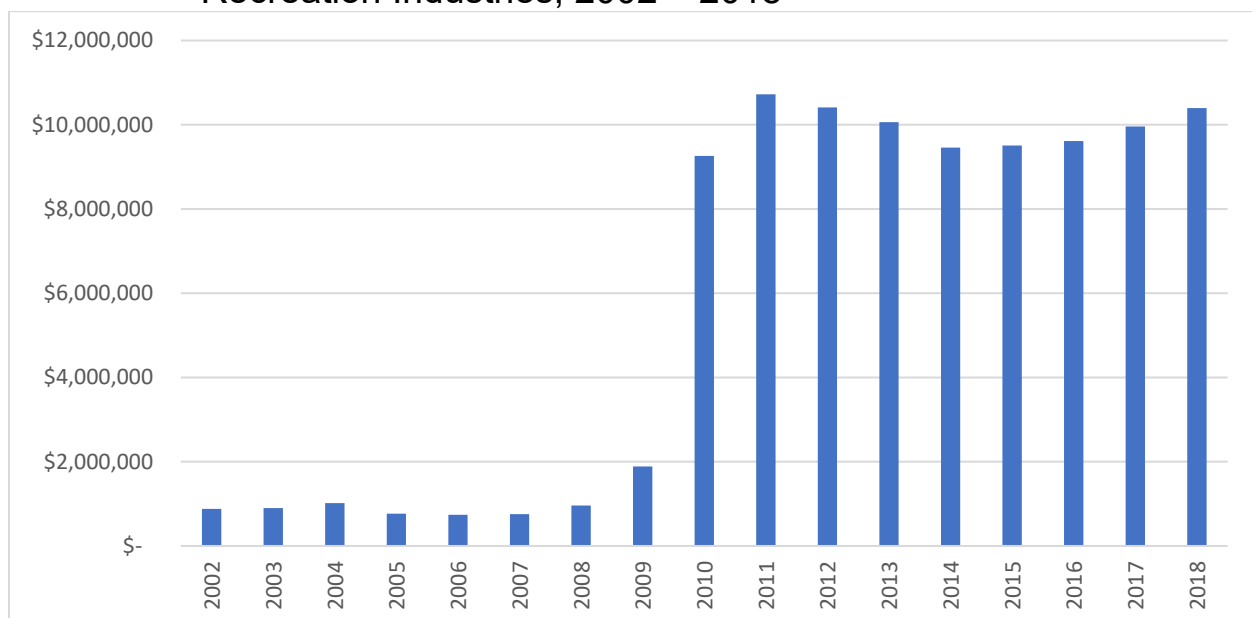
Graph 347 shows that the number of employees in amusement, gambling, and recreation industries tripled in 2010 to about 350 people. Graph 348 shows that total wages increased from less than \$2,000,000 to more than \$9,000,000, which is undoubtedly the result of the State casino opening about 2 miles west of what has become the Power Center bond district.

**Graph 347: ZIP 67801, Average Number of Employees, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



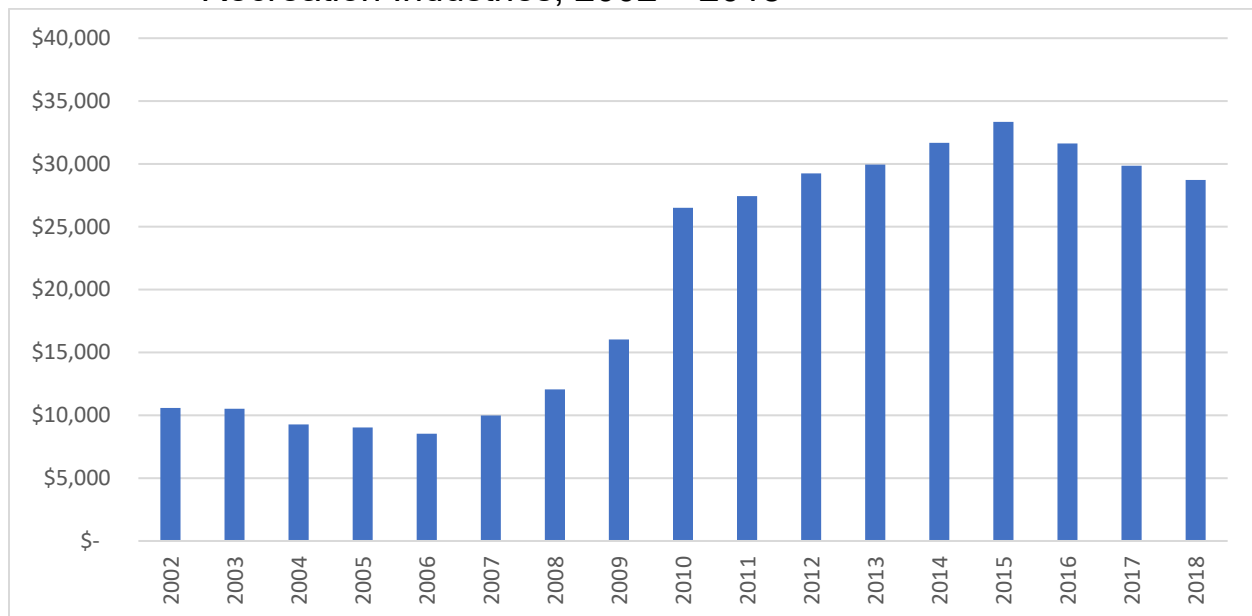
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 348: ZIP 67801, Total Wages, Amusement, Gambling, and Recreation Industries, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 349: ZIP 67801, Average Wage, Amusement, Gambling, and Recreation Industries, 2002 – 2018

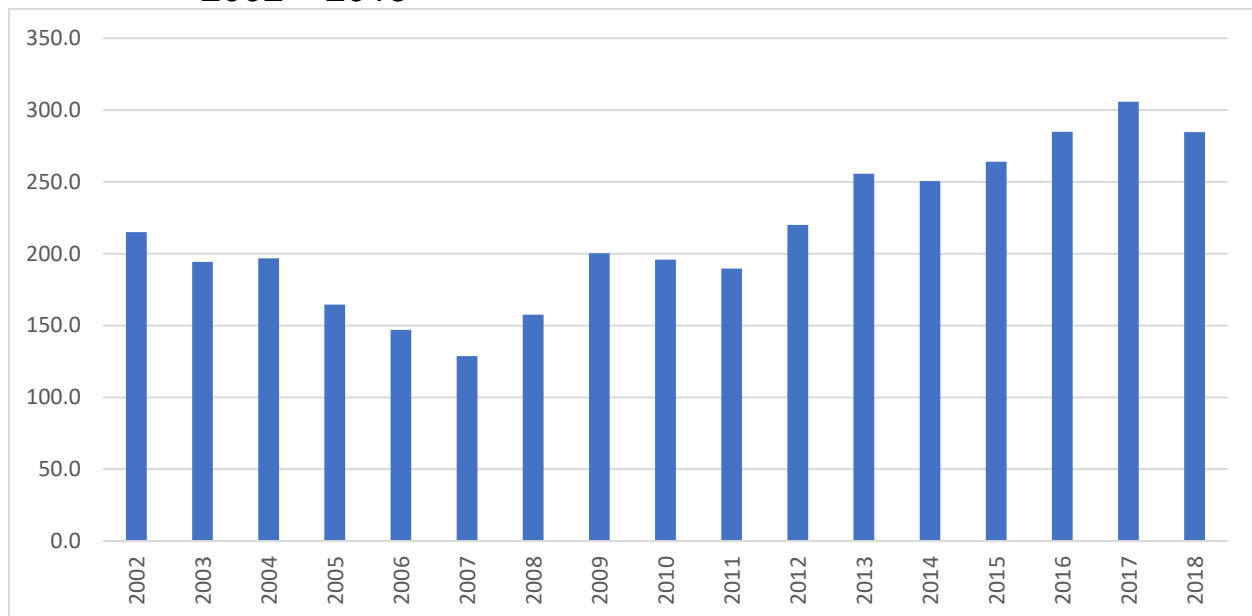


Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 350 shows that the number of employees in the accommodation sector in ZIP 67801 declined from 2002 through 2007, but that since then it has generally trended upward with some small fluctuations reaching a peak of more than 300 people in 2017. Graph 351 reveals the same pattern for total wages. Graph 352 shows an upward increase in average wage over the entire period with occasional minor dips.

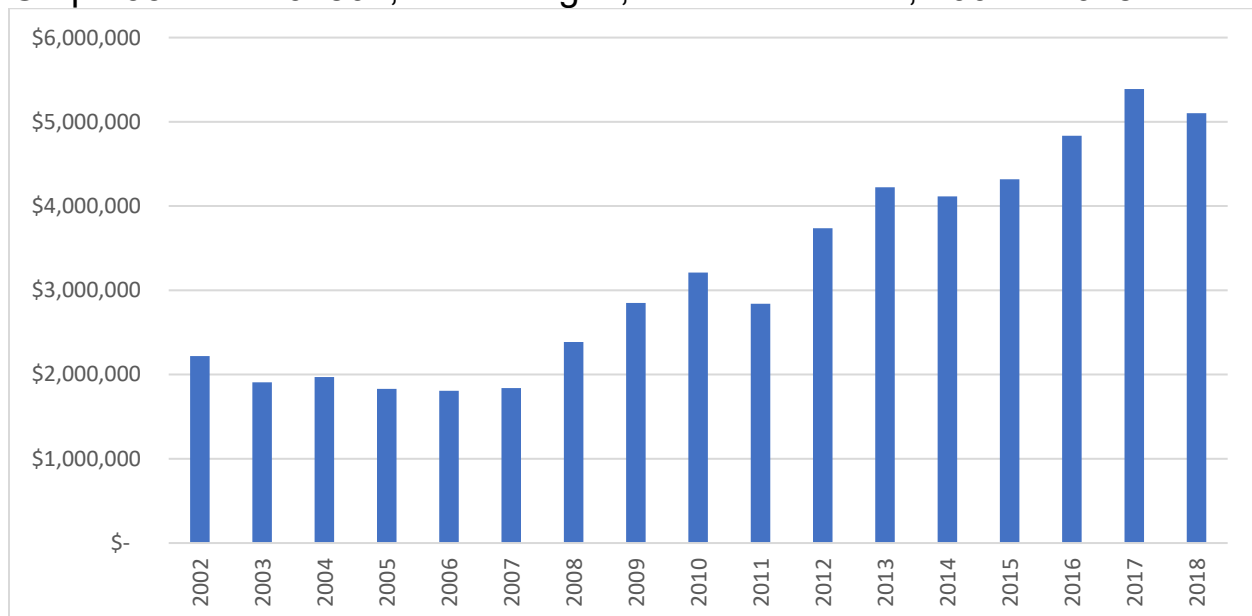


**Graph 350: ZIP 67801, Average Number of Employees, Accommodation, 2002 – 2018**



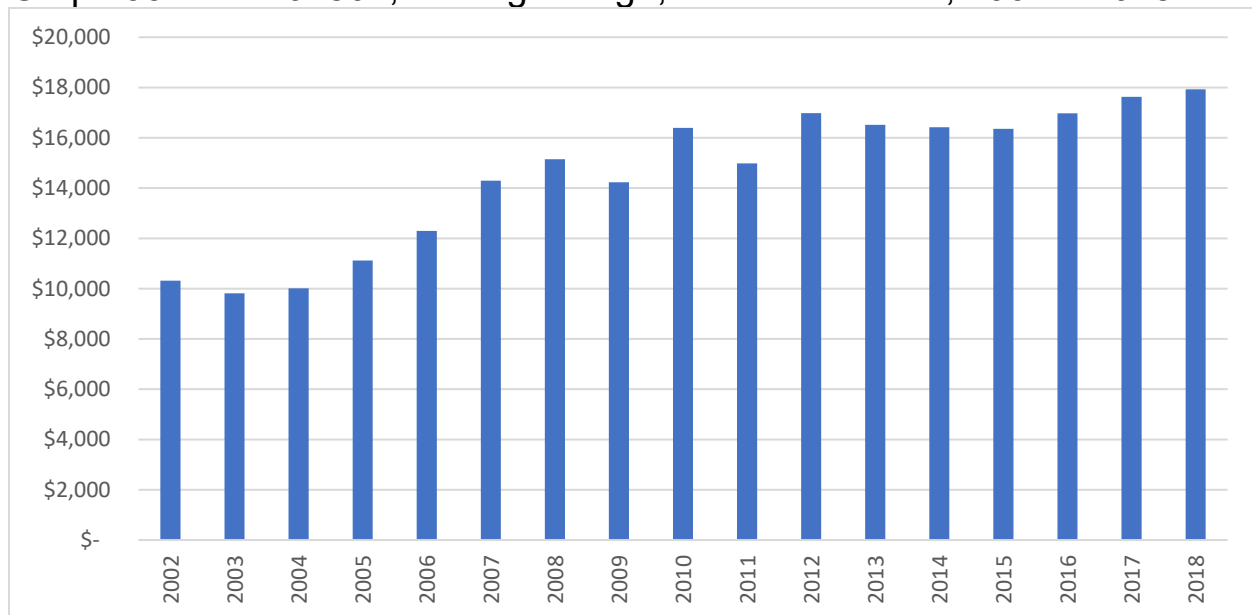
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 351: ZIP 67801, Total Wages, Accommodation, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

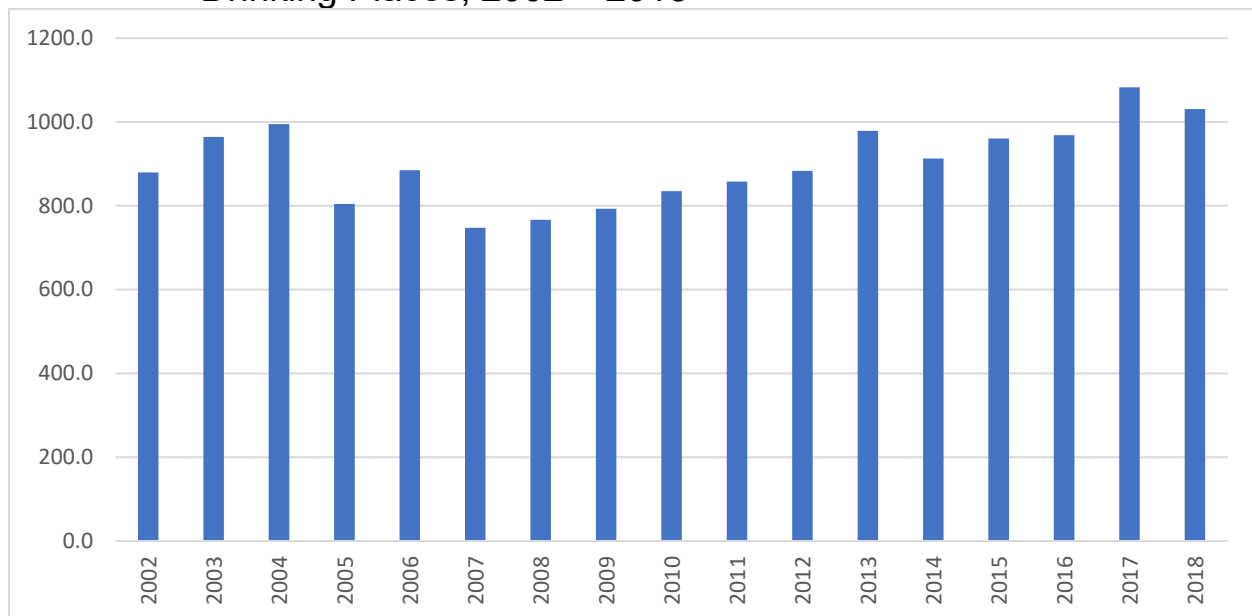
Graph 352: ZIP 67801, Average Wage, Accommodation, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

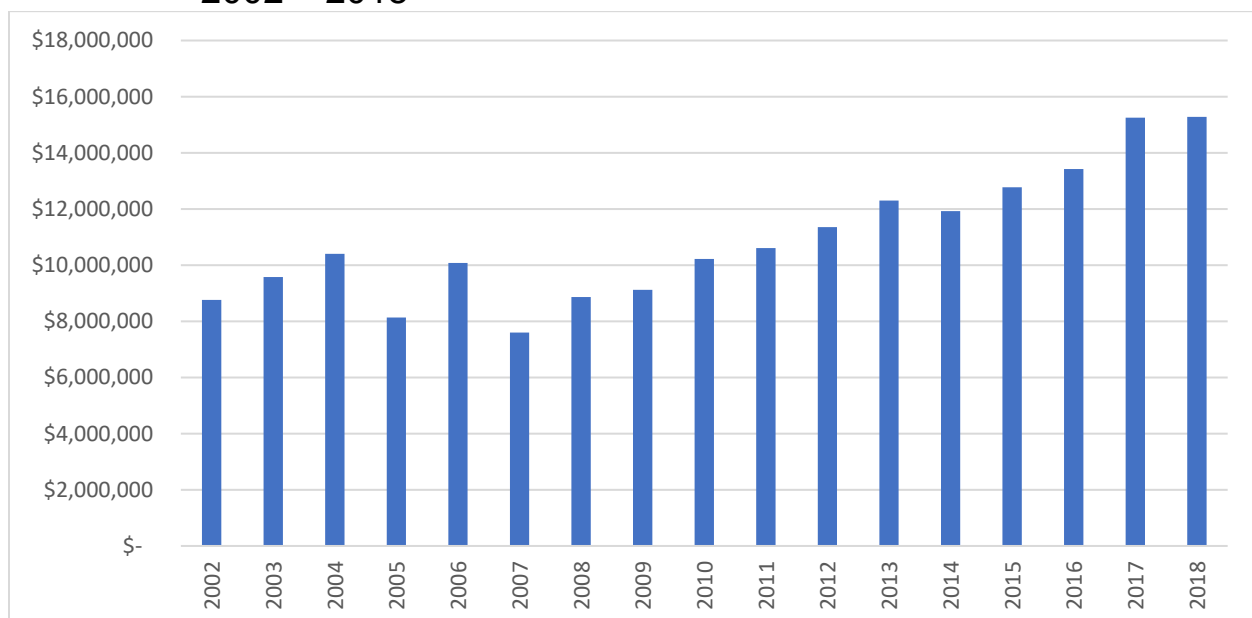
Finally, Graphs 353 through 355 show the trends in the number of employees in food services and drinking places. Between 2002 and 2007 the number of employees fluctuated between 750 and 1000 people. From 2007 through 2018 the number of people followed a more stable upward trend reaching a high of nearly 1100 employees in 2017. Graph 354 shows that total wages followed the pattern of number of employees. Graph 355 shows that the average wage in the food services and drinking places sector was generally upward sloping from 2002 through 2018.

**Graph 353: ZIP 67801, Average Number of Employees, Food Services & Drinking Places, 2002 – 2018**



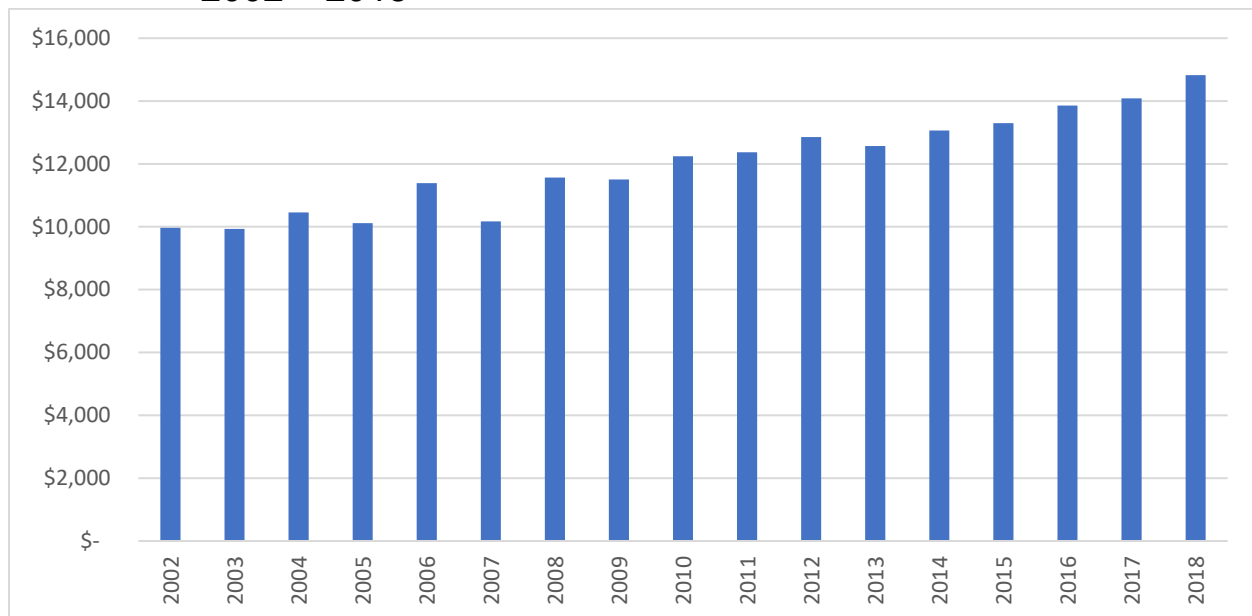
Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

**Graph 354: ZIP 67801, Total Wages, Food Services & Drinking Places, 2002 – 2018**



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

Graph 355: ZIP 67801, Average Wage, Food Services & Drinking Places, 2002 – 2018



Source: Data from Kansas Department of Labor, Extraction and Graph by Docking Institute

### STAR Bond Projects

Heritage STAR Bond project

Begin date 2016

Sales Tax through 2019 = \$ 3,636,668.11

Annual Average (4 years) = \$ 909,167.03

Dodge City ZIP Code: 67801

Power Center STAR Bond project

Begin date 2018

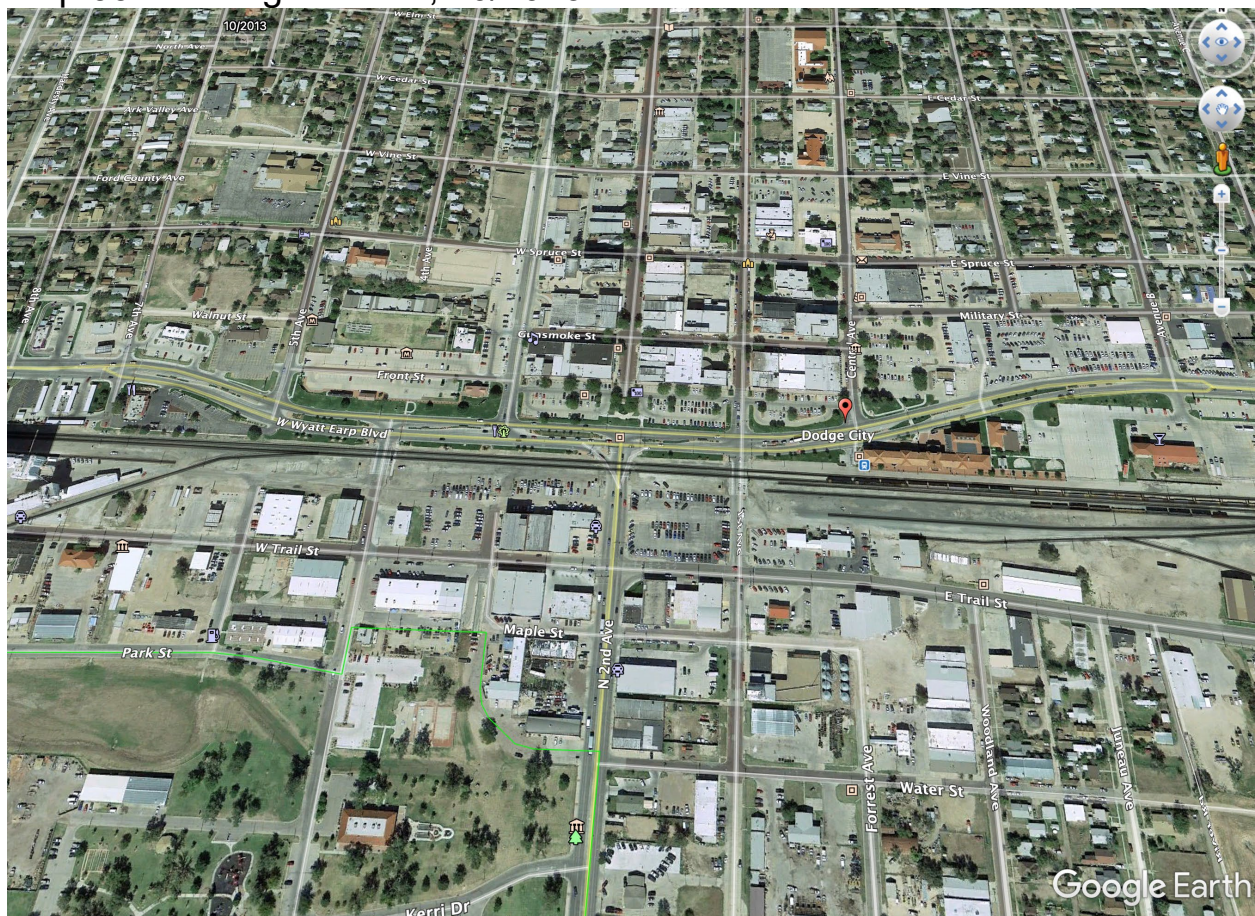
Sales Tax through 2019 = \$297,127.54

Dodge City ZIP Code: 67801

Maps 33 through 39 show the Front Street area and the surrounding areas of Dodge City. Map 33 provides a wider view and includes the undeveloped land in the lower left corner of the map. Maps 34 and 35 focus in and show that land before and after the development of the water park.

Maps 36 and 37 show the Power District. Maps 38 and 39 show the Entertainment District Area. The Entertainment District STAR Bond area is not inclusive of Boot Hill Casino & Resort found within its boundaries.

Map 33: Heritage District, 10/2013



Source: Google Earth



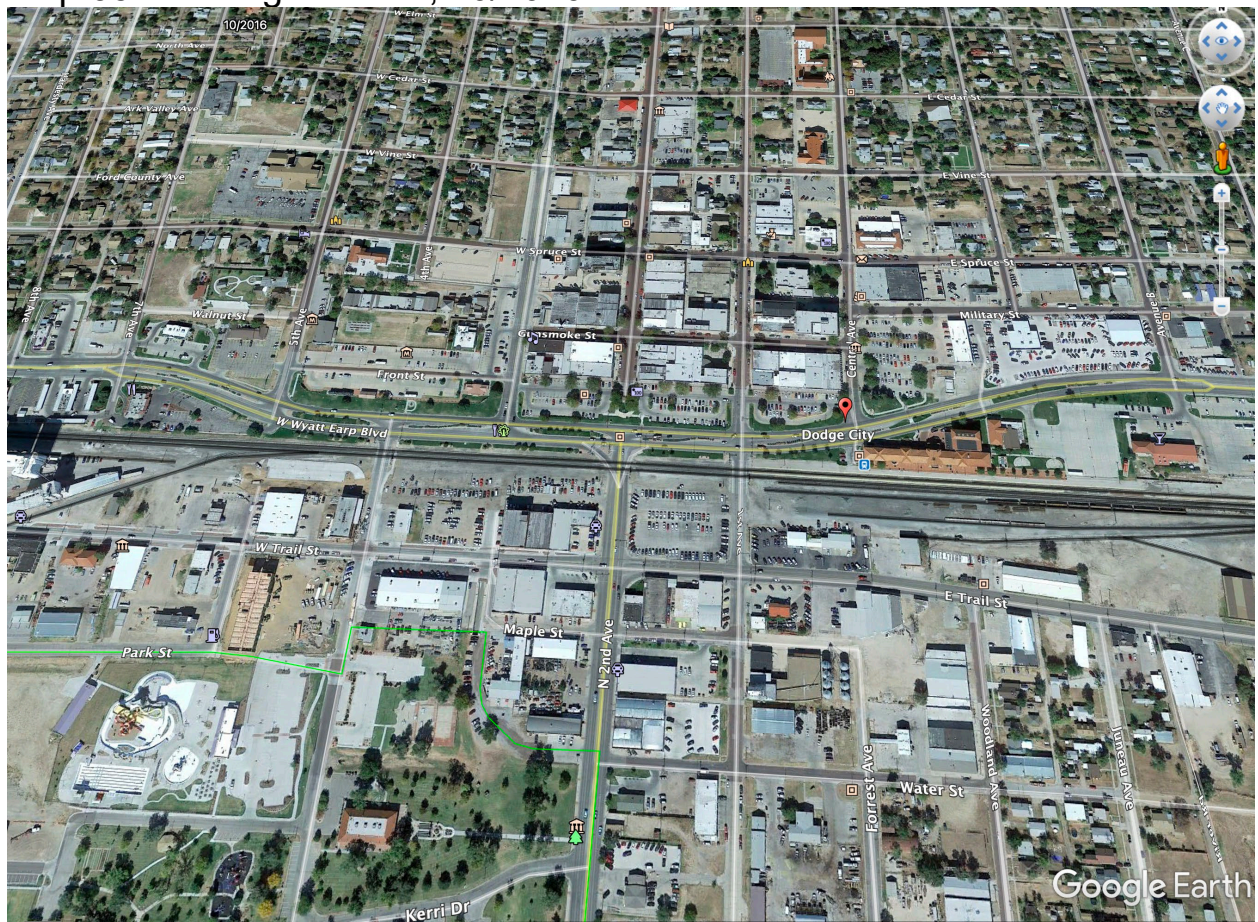
Map 34: Heritage District, 10/2013



Source: Google Earth



Map 35: Heritage District, 10/2016



Source: Google Earth



Map 36: Power District, 7/2008



Source: USDA Farm Service Agency, Retrieved from Google Earth



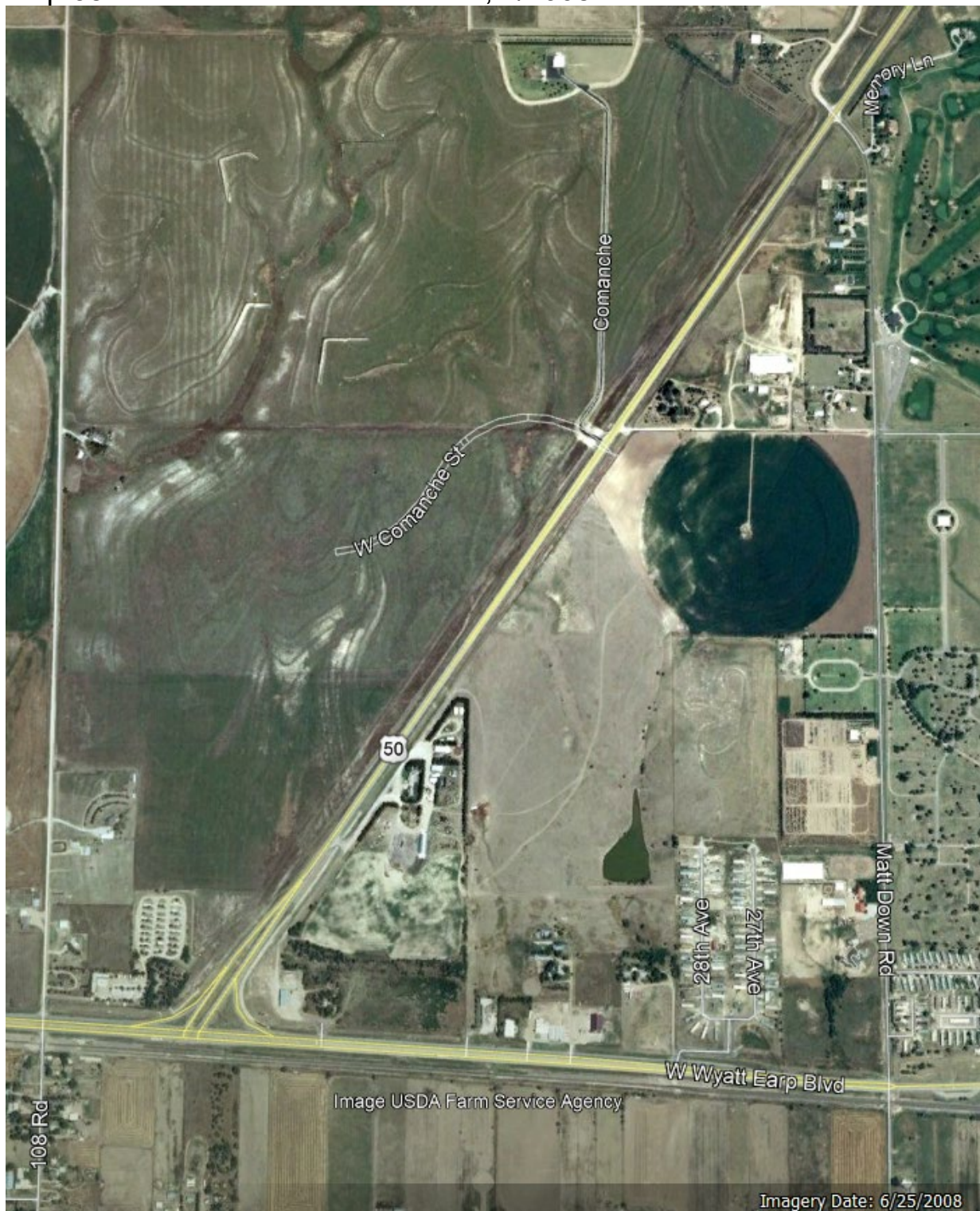
Map 37: Power District 10/2016



Source: Google Earth



Map 38: Entertainment Area District, 7/2008



Source: USDA Farm Service Agency, Retrieved from Google Earth



Map 39: Entertainment District Area, 10/2016



Source: Google Earth

## Dodge City Findings

- The Heritage Area Project in 2015 and the Power Center Area Project in 2018 are the two STAR Bond issues in Dodge City.
- Dodge City is the smallest community that we examined and it is the most remotely located. In a sense it is an island separated from the rest of Kansas.
- The Heritage District is located in an already developed part of Dodge City, but there is evidence of some redevelopment, as was previously noted in the Riverwalk district and adjacent areas in Wichita.
- The Power Center District is a “brown ground” retail development, similar to the Kansas Underground Salt Mine District B in that the sales tax partially helps pay the Heritage District bonds.
- Neither the Heritage District (2016) nor the Power Center District (2018) has been completed. Thus, the full impact cannot be measured. However, the maps of each area show that change is occurring.

## Helpful Sources

Federal Reserve Bank of Saint Louis, FRED

U.S. Census Bureau

U.S. Travel Association

Kansas Department of Wildlife, Parks, and Tourism

Bureau of Economic Analysis

IMPLAN

Kansas Department of Commerce

Kansas Department of Labor

Kansas Department of Revenue

Wyandotte Unified Government

City of Wichita

City of Hutchinson

Reno County Historical Society

City of Dodge City

## Helpful People

### Dodge City

- Nick Hernandez - **City Manager**
- Nicole May - **Director of Finance**
- Joann Knight – **Executive Director of Dodge City/Ford County Economic Development Corporation**

### Hutchinson

- Michael Ables - **Director of Reno County Historical Society**
- Amy Bickel - **Director of Marketing [Kansas State Fair]**
- Mimi Meredith - **Senior Vice President of Development and Chief Development Officer [Cosmosphere]**
- Angela Richard - **Director of Finance**
- Connie Schmitt - **Director of Industry Relations & Development**

### Wichita

- Mark Elder - **Development Analyst**
- Robert Layton - **City Manager**
- Joe Norton - **Attorney [Gilmore Bell]**
- Scot Rigby - **Assistant City Manager, Director of Development Services**

### Wyandotte County Unified Government

- Mike Grimm - **Manager of [Wyandotte] Unified Government Research Division**
- Alley Porter - **Commission Liason**
- Alyse Villarreal - **Debt Program Coordinator**
- Kathleen VonAchen - **Chief Finance Officer**
- Doug Bach – **County Administrator of Wyandotte Unified Government**

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### Kansas Department of Revenue

- Amy Kramer - **Office of Policy and Research**
- Kathleen Smith - **Office of Policy and Research**

### Kansas Department of Labor

- Angela Berland - **Director of Labor Market Information Services (LMIS)**

### Kansas Department of Commerce

- Robert North - **Chief Attorney**