Northwest and Northcentral Kansas Retail Market Gap Analysis 2022: Regional Overview

DOCKING INSTITUTE of Public Affairs

FORT HAYS STATE UNIVERSITY

Sponsored by Kansas Small Business Development Center at Fort Hays State University

Brett Zollinger, Ph.D.
Director

Jian Sun, Ph.D.
Assistant Director

Michael S. Walker, M.S.
Research Scholar

Marisa M. Johnson, M.B.A.
Administrative Specialist

Leslie Watson-Divittore, M.S.
Research Coord. Admin. Specialist

The staff of the Docking Institute of Public Affairs and its University Center for Survey Research are dedicated to serving the people of Kansas and surrounding states.

Mission:
To facilitate effective public policy decision-making among governmental and nonprofit entities

Docking Institute of Public Affairs
Fort Hays State University
600 Park Street
Hays, Kansas 67601-4099
Telephone: (785) 628-4197
FAX: (785) 628-4188
www.fhsu.edu/docking

SCAN ME

Northwest and Northcentral Kansas Retail Market Gap Analysis 2022: Regional Overview

Prepared By:
Dr. Jian Sun, Assistant Director
Dr. Brett Zollinger, Director
Dr. Preston Gilson, Senior Policy Fellow
Spencer Manning, Surveying and Data Visualization Coordinator

Docking Institute of Public Affairs

Prepared For:
Kansas Small Business Development Center at Fort Hays State University

Acknowledgements. The Docking Institute thanks these individuals who assisted in identifying survey content and/or made considerable contributions to data collection/management: Clare Gustin, Institute Policy Fellow and Sunflower Electric Power Corporation Vice President for Member Services and External Affairs; Mike Walker, Institute Research Scholar; Marisa M. Johnson, Institute Administrative Specialist; Leslie Watson-Divittore, Institute Graduate Research Assistant; and Ryan Lalicker, Wesley Davis, Hannah Cross, Institute Student Research Assistants. KSBDC-FHSU staff were also instrumental in identifying and finalizing survey content.

Contents

List of Tables

Project Summary

The Docking Institute was commissioned by Kansas Small Business Development Center -- FHSU Region to conduct a retail market gap analysis for its 29-county region comprised of counties in northwest and northcentral Kansas in 2022. The Docking Institute is making the findings of this research project available on Tableau Public™ and in written county-level reports. Using Tableau Public, data from this research can be organized and displayed in a customizable fashion based on the end user's main interests – a highly dynamic, interactive way of exploring the data. For access to the customizable viewing of findings in Tableau Public, go to the Docking Institute's website (www.fhsu.edu/docking) and scroll down to Services and Reports. Access to the Tableau Public version and other project information is located under ***Northwest and Northcentral Kansas Retail Market Gap Analysis 2022*** tile.

The principal feature of this analysis is an original survey measuring perceived gaps in 73 categories of consumer retail goods and services at the county level in all of the 29 counties. A random selection of households within each county was surveyed using a multi-wave mail-out/mail-back questionnaire. Final survey completions across the 29 counties ranged from 77 (from the county with the lowest population of households) to 214 completions per county. This results in a survey margin of error (MoE) at the county level ranging from +/-6% to 10% for 28 of the counties. MoE exceeded 10% only in the county with 77 completions (MoE is +/-11%). For all counties, the age profile of survey respondents is notably older than the general population of adults. Relatedly, the average number of people living in the household and the number of children in the household in counties are both smaller in the survey sample than in the general population of households.

For every category of the consumer goods/services in the survey, respondents were asked to indicate whether they make purchases of the good/service in the county, by traveling to another county, and by purchasing online/by phone. Then from a list of four possible reasons for out-of-county purchases (not available locally, lack of variety or quantity, lack of quality, priced too high), select all that contribute to why they make out-of-the county purchases. Responses to these "location" of purchasing questions and then the "reasons" for any out-of-county purchasing are charted in the following report for every one of the 73 categories of goods/services. Maps showing the cities where out-of-county purchases are reported are offered in the written county reports and on Tableau Public. The maps in written reports include only cities in Kansas and in portions of Colorado and Nebraska. Purchases in states other than these three are very infrequently mentioned. Maps are still presented even if there is no mention by respondents of a city where out-of-county purchases occur. Following this sequence of questions within a category of good or service, respondents could offer up to three possible specific goods/services from that category that they would prefer to purchase in their county. From open-ended mentions of these locally desired goods/services themes were coded and appear in a written report table for that good/service category following each map (when these tables contain only 0.0% for every theme, it means none of the county respondents offered an answer in this open-ended question). These tables are also available in Tableau Public. A final component of this original surveying asked those respondents who own or operate a business in their county to indicate any goods or services that they currently must purchase out of county but would prefer to purchase in the county if they believed it could "feasibly be sourced locally." Themes from the business owner/operator responses are provided in a written report table and available in Tableau Public.

A secondary feature of this analysis provides a profile of the county from existing data sources of retail activity and retail-associated activities in the county. Retail business is an umbrella term that covers businesses that sell goods or services to final consumers. This diversity means that the more retail businesses associated with a community, the more likely that people will shop locally. For example, a community with only an isolated restaurant is less appealing than one that has two or more restaurants. Because if one restaurant is too busy, then another may have an available table. Likewise, a community with more types of retail is more likely to attract consumers than one with fewer types of retail merchandise. Competition is an expected part of every enterprise and thus growth and change are necessary for successful enterprises. Our approach is to look for patterns that are revealed in comparisons with the larger region and with other counties, ranges of values based on demographic characteristics, and connections between locations.

Research Methods

Using address-based sampling (ABS), the Docking Institute's Center for Survey Research conducted a multi-wave mail survey of 44,260 randomly selected households across 29 counties of northwest and northcentral Kansas from March 2 to May 17, 2022. The Docking Institute purchased the address-based sample of households from a national expert sampling vendor. The questionnaire cover letter asked that "the adult (18 or older) in the household with the most knowledge of the household's purchases of goods and services" complete the questionnaire. The self-administered questionnaire booklet was designed to be taped shut and dropped in the mail upon completing the questions, as the back cover is printed with business-reply postage and pre-addressed for return to the Docking Institute. Representatives of both the Docking Institute and KSBDC-FHSU signed the cover letter, with an invitation to respondents to contact either representative by phone or email should they have questions or concerns. On March 28, a follow-up wave of questionnaires was sent only to those who had not yet responded to the initial wave. A final invitation wave using postcard reminder was sent on April 18, and the postcard offered the option of responding to an online version questionnaire hosted on the Docking Institute's website, with respondents using their mailing tracking number to authenticate. In consultation with KSBDC-FHSU Region, it was the responsibility of the Docking Institute to develop survey items that were technically correct and without bias. For a .pdf copy of the questionnaire booklet, go to the Docking Institute's website (www.fhsu.edu/docking) and scroll down to Services and Reports. This and other project information is located under ***Northwest and Northcentral Kansas Retail Market Gap Analysis 2022*** tile.

The Docking Institute uses Fort Hays State University's educational nonprofit mailing permit, providing a substantial cost savings over using First Class mail. While this does prevent undeliverable and any returns to sender from being detected, the ABS survey mailings are also checked against the USPS National Change of Address database, keeping these types of dispositions to a minimum. Of 44,260 randomly selected households invited to participate, 24 were determined ineligible due to the targeted residence being vacant or all at the targeted household being deceased/disabled. The Institute learned of these dispositions because someone collecting mail for the targeted residence courteously informed the Institute by either calling or emailing our office or by writing a note on the questionnaire and returning it to us. A total of 4,298 usable completions were achieved from the presumed 44,236 eligible households invited to participate, resulting in an overall response rate of 9.7%. Ninety-one of the completions were submitted using the online response option. Wave 1 yielded about 70% of the total response, with wave 2 of the questionnaire mailing and the postcard reminder wave accounting for the remaining 30%. Final county-level completions across the 29 counties ranged from 77 (from the county with the lowest population of households) to 214 per county. This results in county-level survey margins of error (MoE) ranging from +/-6% to 10% for 28 of the counties MoE exceeded 10% only in the county with 77 completions (MoE is +/-11%). A secondary feature of this analysis provides a profile of the county's retail activity and retail-associated activities available from existing sources of data.

Survey Findings on Largest Gaps in Local Purchasing Behavior

All county-level written reports and Tableau Public versions of the findings contain charts that document the percentages of households in a county that make purchases of the good/service in the county, travel to another county, and/or purchasing online or by phone, as well as the percentages who indicate that out-of-county purchasing occurs because the good/service is not available locally, local variety or quantity is lacking, local quality is lacking, and/or is priced too high locally. To the extent that households are purchasing goods/services out of county either through travel to towns and cities outside the county or by purchasing online/by phone, local establishments are not fully meeting goods/services demand[1]. Readers of the county-level written reports and users of Tableau Public will be able to observe the extent of this in counties and by customizable grouping of counties.

The regional overview analysis groups all counties into one of five strata by number of households in a county. These strata are:

Stratum 1: the nine counties with up to 1,400 households.
Stratum 2: the nine counties with 1,400 to 2,399 households.
Stratum 3: the eight counties with 2,400 to 3,641 households.
Stratum 4: the two trade center counties of Ellis (11,686 households) and Barton (10,628 households)
Stratum 5: the small metro county of Saline (22,251 households)

In this regional overview analysis, the Institute provides to the KSBDC-FHSU Regional Director more conservative measures of gaps in local purchasing of the 73 goods/services categories covered in the 29-county region surveying than just the percentage who purchase through travel to another county or percentage who purchase online/by phone. These more conservative measures of large gaps in local purchasing behavior are defined by patterns of:

1) purchasing of a good/service <u>in another county that exceeds in-county</u> purchasing by <u>at least 10 percentage points</u> in <u>at least four</u> of the counties within the stratum, and

2) purchasing of a good/service <u>online or by phone that exceeds in-county</u> purchasing by <u>at least 10 percentage point</u> in <u>at least four</u> counties within a stratum.

Tables 1 through 6 below list the goods/services by stratum that meet the above thresholds for large gaps in local purchasing. Within each stratum, the good/services are listed in order from the highest to lowest mean percentage gap across the counties of the stratum. Of course, the mean can mask substantial differences in gap magnitude among the counties, thus, it should only be used as very general indicator of

[1] Of course, we acknowledge that some portion of such extra-local purchasing occurs in conjunction with leisure and business travel and is not always due to complete lack of a good/service locally.

relative ranking of good/service gaps. When the difference between purchasing in another county and purchasing in my county has a negative value (-) in a table, the percentage who purchase the good/service in the county exceeds the percentage who purchase by traveling to another county. Likewise, when the difference between purchasing online/by phone has a negative value (-) in a table, the percentage who purchase the good/service in the county exceeds the percentage who purchase online/by phone.

Please note that there are no large gaps identified for Stratum 4 (Ellis and Barton counties) nor Stratum 5 (Saline County). This is because gaps did not reach 10 percentage points in counties of either stratum, which is not surprising given that these three counties are trade centers of the region.

From Tables 1-3 below here is a summary list of goods/services for which **traveling to another county to purchase *exceeds* in-county purchasing** by a large amount (10% or greater in at least four counties of the stratum), and the list is presented in order from largest to smallest mean percentage gap within a stratum:

Stratum 1: Counties with up to 1,400 households	Stratum 2: Counties with 1,400 to 2,399 households	Stratum 3: Counties with 2,400 to 3,641 households
Shoes and boots	Shoes and boots	Shoes and boots
Men's clothing	Men's clothing	Women's clothing
Women's clothing	Women's clothing	Men's clothing
New and used vehicles	Large electronics	Sporting and hobby goods
Furniture	New and used vehicles	Large electronics
Large electronics	Furniture	New and used vehicles
Sporting and hobby goods	Small electronics	Children's clothing
Small electronics	Sporting and hobby goods	Large appliances
Home office supplies	Small portable appliances	
Small portable appliances	Children's clothing	
Cell phones	Dental health	
Children's clothing	Toys	
Dental health	Home office supplies	
Toys	Cell phones	
Cosmetics	Large appliances	
Pet supplies		
Financial planning/management		

From Tables 4-6 below here is a summary list of goods/services for which **purchasing online/by phone *exceeds* in-county purchasing** by a large among (10% or greater in at least four counties of the stratum), and the list is presented in order from largest to smallest mean percentage gap within a stratum:

Stratum 1: Counties with up to 1,400 households	**Stratum 2: Counties with 1,400 to 2,399 households**	**Stratum 3: Counties with 2,400 to 3,641 households**
Women's clothing	**Shoes and boots**	**Books**
Shoes and boots	**Women's clothing**	**Shoes and boots**
Men's clothing	**Men's clothing**	**Women's clothing**
Books	**Books**	**Men's clothing**
Sporting and hobby goods	**Children's clothing**	**Toys**
Children's clothing	**Toys**	
Toys	**Sporting and hobby goods**	
Small electronics	**Small electronics**	
Game systems		

TABLE 1. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Shoes & Boots	(*a*) Purchase in My County	2.7%	4.7%	0.6%	18.6%	2.0%	4.9%	3.7%	4.9%	2.6%	
	(*b*) Purchase in Another County	61.6%	65.6%	68.1%	67.8%	62.4%	54.5%	62.2%	68.5%	53.2%	
	Difference (*b-a*)	58.9%	***60.9%***	***67.5%***	49.2%	60.4%	49.7%	58.5%	***63.6%***	50.6%	**57.7%**
Men's Clothing	(*a*) Purchase in My County	5.4%	8.6%	2.5%	11.0%	4.0%	2.1%	6.1%	4.2%	3.9%	
	(*b*) Purchase in Another County	57.1%	54.7%	62.6%	50.8%	56.4%	55.9%	53.7%	58.0%	55.8%	
	Difference (*b-a*)	51.8%	46.1%	***60.1%***	39.8%	52.5%	***53.8%***	47.6%	***53.8%***	51.9%	**50.8%**
Women's Clothing	(*a*) Purchase in My County	12.5%	12.5%	3.7%	25.4%	5.0%	11.2%	9.8%	4.9%	2.6%	
	(*b*) Purchase in Another County	54.5%	61.7%	60.1%	60.2%	54.5%	42.0%	46.3%	63.6%	53.2%	
	Difference (*b-a*)	42.0%	49.2%	***56.4%***	34.7%	49.5%	30.8%	36.6%	***58.7%***	***50.6%***	**45.4%**
Vehicles New & Used	(*a*) Purchase in My County	26.8%	29.7%	2.5%	7.6%	36.6%	19.6%	15.9%	18.9%	2.6%	
	(*b*) Purchase in Another County	42.0%	45.3%	65.6%	49.2%	53.5%	47.6%	53.7%	56.6%	68.8%	
	Difference (*b-a*)	15.2%	15.6%	***63.2%***	***41.5%***	16.8%	28.0%	37.8%	37.8%	***66.2%***	**35.8%**

TABLE 1. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

County		Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
Number of Respondents		112	128	163	118	101	143	82	143	77	
Number of Households		1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Furniture	**(*a*) Purchase in My County**	15.2%	6.3%	25.2%	4.2%	1.0%	4.2%	43.9%	51.0%	18.2%	
	(*b*) Purchase in Another County	50.9%	60.9%	44.2%	65.3%	69.3%	53.8%	40.2%	34.3%	53.2%	
	Difference (*b-a*)	35.7%	***54.7%***	19.0%	***61.0%***	***68.3%***	49.7%	-3.7%	-16.8%	35.1%	**33.7%**
Large Electronics	**(*a*) Purchase in My County**	14.3%	4.7%	4.3%	2.5%	11.9%	23.1%	30.5%	5.6%	11.7%	
	(*b*) Purchase in Another County	36.6%	48.4%	46.0%	50.8%	43.6%	33.6%	22.0%	52.4%	37.7%	
	Difference (*b-a*)	22.3%	***43.8%***	41.7%	***48.3%***	31.7%	10.5%	-8.5%	***46.9%***	26.0%	**29.2%**
Sporting Goods & Hobby	**(*a*) Purchase in My County**	2.7%	11.7%	2.5%	5.9%	3.0%	21.0%	6.1%	5.6%	6.5%	
	(*b*) Purchase in Another County	31.3%	28.1%	33.1%	44.9%	34.7%	21.0%	34.1%	37.1%	27.3%	
	Difference (*b-a*)	28.6%	16.4%	30.7%	***39.0%***	***31.7%***	0.0%	28.0%	***31.5%***	20.8%	**25.2%**
Small Electronics	**(*a*) Purchase in My County**	10.7%	15.6%	5.5%	3.4%	19.8%	30.1%	17.1%	18.2%	7.8%	
	(*b*) Purchase in Another County	34.8%	36.7%	38.7%	47.5%	39.6%	22.4%	39.0%	38.5%	29.9%	
	Difference (*b-a*)	***24.1%***	21.1%	***33.1%***	***44.1%***	19.8%	-7.7%	22.0%	20.3%	22.1%	**22.1%**

TABLE 1. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Home Office Supplies	**(*a*) Purchase in My County**	25.0%	25.0%	16.6%	12.7%	23.8%	24.5%	17.1%	31.5%	14.3%	
	(*b*) Purchase in Another County	38.4%	39.1%	42.3%	52.5%	49.5%	37.1%	42.7%	42.7%	44.2%	
	Difference (*b-a*)	13.4%	14.1%	***25.8%***	***39.8%***	25.7%	12.6%	25.6%	11.2%	***29.9%***	**22.0%**
Small, Portable Appliances	**(*a*) Purchase in My County**	20.5%	34.4%	11.0%	9.3%	28.7%	33.6%	26.8%	31.5%	23.4%	
	(*b*) Purchase in Another County	47.3%	41.4%	50.3%	64.4%	48.5%	30.1%	46.3%	47.6%	41.6%	
	Difference (*b-a*)	***26.8%***	7.0%	***39.3%***	***55.1%***	19.8%	-3.5%	19.5%	16.1%	18.2%	**22.0%**
Cell Phone	**(*a*) Purchase in My County**	26.8%	59.4%	4.9%	0.8%	29.7%	34.3%	50.0%	37.1%	7.8%	
	(*b*) Purchase in Another County	50.0%	27.3%	68.1%	70.3%	44.6%	42.0%	36.6%	43.4%	57.1%	
	Difference (*b-a*)	23.2%	-32.0%	***63.2%***	***69.5%***	14.9%	7.7%	-13.4%	6.3%	***49.4%***	**21.0%**
Children's Clothing	**(*a*) Purchase in My County**	4.5%	3.1%	1.2%	4.2%	1.0%	1.4%	2.4%	1.4%	2.6%	
	(*b*) Purchase in Another County	21.4%	16.4%	14.1%	19.5%	15.8%	14.0%	19.5%	23.8%	16.9%	
	Difference (*b-a*)	***17.0%***	13.3%	12.9%	15.3%	14.9%	12.6%	***17.1%***	***22.4%***	14.3%	**15.5%**

TABLE 1. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Dental Health	**(*a*) Purchase in My County**	46.4%	53.1%	23.3%	35.6%	60.4%	45.5%	54.9%	7.7%	0.0%	
	(*b*) Purchase in Another County	41.1%	35.9%	61.3%	51.7%	31.7%	42.7%	46.3%	81.8%	80.5%	
	Difference (*b-a*)	-5.4%	-17.2%	***38.0%***	16.1%	-28.7%	-2.8%	-8.5%	***74.1%***	***80.5%***	**16.2%**
Toys	**(*a*) Purchase in My County**	8.9%	19.5%	8.6%	6.8%	12.9%	17.5%	11.0%	15.4%	9.1%	
	(*b*) Purchase in Another County	29.5%	18.8%	18.4%	28.8%	27.7%	18.9%	23.2%	29.4%	24.7%	
	Difference (*b-a*)	***20.5%***	-0.8%	9.8%	***22.0%***	14.9%	1.4%	12.2%	14.0%	***15.6%***	**12.2%**
Cosmetics	**(*a*) Purchase in My County**	17.0%	35.2%	19.6%	11.9%	26.7%	22.4%	20.7%	25.9%	23.4%	
	(*b*) Purchase in Another County	33.9%	28.9%	28.8%	39.8%	40.6%	23.8%	39.0%	32.2%	31.2%	
	Difference (*b-a*)	***17.0%***	-6.3%	9.2%	***28.0%***	13.9%	1.4%	***18.3%***	6.3%	7.8%	**10.6%**
Pet Supplies	**(*a*) Purchase in My County**	24.1%	32.8%	22.7%	16.1%	27.7%	32.9%	28.0%	23.1%	20.8%	
	(*b*) Purchase in Another County	27.7%	29.7%	37.4%	45.8%	31.7%	21.0%	35.4%	37.1%	33.8%	
	Difference (*b-a*)	3.6%	-3.1%	***14.7%***	***29.7%***	4.0%	-11.9%	7.3%	***14.0%***	13.0%	**7.9%**

TABLE 1. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

County		Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
Number of Respondents		112	128	163	118	101	143	82	143	77	
Number of Households		1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Financial Planning/ Management	**(*a*) Purchase in My County**	8.0%	10.9%	17.8%	9.3%	19.8%	32.9%	42.7%	14.0%	13.0%	
	(*b*) Purchase in Another County	25.0%	16.4%	28.2%	23.7%	24.8%	21.0%	13.4%	24.5%	24.7%	
	Difference (*b-a*)	***17.0%***	5.5%	10.4%	***14.4%***	5.0%	-11.9%	-29.3%	10.5%	***11.7%***	**3.7%**

TABLE 2. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Shoes & Boots	**(*a*) Purchase in My County**	5.0%	3.2%	10.4%	16.7%	10.3%	7.3%	2.9%	3.7%	12.9%	
	(*b*) Purchase in Another County	42.1%	46.8%	68.3%	57.1%	61.5%	61.5%	70.0%	63.7%	48.4%	
	Difference (*b-a*)	37.2%	43.5%	***57.9%***	40.4%	51.1%	54.2%	***67.1%***	***60.0%***	35.5%	**49.7%**
Men's Clothing	**(*a*) Purchase in My County**	8.3%	4.5%	13.4%	23.7%	11.5%	6.8%	4.3%	8.1%	22.6%	
	(*b*) Purchase in Another County	44.6%	45.5%	65.9%	51.3%	55.7%	47.9%	62.9%	65.9%	42.5%	
	Difference (*b-a*)	36.4%	40.9%	***52.4%***	27.6%	44.3%	41.1%	***58.6%***	***57.8%***	19.9%	**42.1%**
Women's Clothing	**(*a*) Purchase in My County**	7.4%	16.2%	17.1%	18.6%	16.7%	12.5%	7.9%	11.9%	18.3%	
	(*b*) Purchase in Another County	36.4%	45.5%	64.6%	56.4%	54.6%	47.4%	58.6%	62.2%	45.2%	
	Difference (*b-a*)	28.9%	29.2%	***47.6%***	37.8%	37.9%	34.9%	***50.7%***	***50.4%***	26.9%	**38.3%**
Large Electronics	**(*a*) Purchase in My County**	9.1%	7.8%	4.9%	11.5%	23.0%	6.8%	7.1%	3.0%	9.7%	
	(*b*) Purchase in Another County	39.7%	40.3%	49.4%	37.2%	38.5%	47.9%	58.6%	50.4%	37.6%	
	Difference (*b-a*)	30.6%	32.5%	***44.5%***	25.6%	15.5%	41.1%	***51.4%***	***47.4%***	28.0%	**35.2%**

TABLE 2. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Vehicles New & Used	**(*a*) Purchase in My County**	35.5%	7.8%	12.2%	34.6%	25.9%	37.0%	20.0%	3.0%	19.9%	
	(*b*) Purchase in Another County	47.1%	66.2%	65.2%	42.3%	46.6%	42.7%	50.7%	67.4%	52.2%	
	Difference (*b-a*)	11.6%	***58.4%***	***53.0%***	7.7%	20.7%	5.7%	30.7%	***64.4%***	32.3%	**31.6%**
Furniture	**(*a*) Purchase in My County**	32.2%	11.0%	2.4%	49.4%	37.9%	42.2%	11.4%	6.7%	25.3%	
	(*b*) Purchase in Another County	47.9%	56.5%	64.0%	44.2%	36.8%	38.0%	67.1%	63.7%	47.3%	
	Difference (*b-a*)	15.7%	45.5%	***61.6%***	-5.1%	-1.1%	-4.2%	***55.7%***	***57.0%***	22.0%	**27.5%**
Small Electronics	**(*a*) Purchase in My County**	14.9%	19.5%	10.4%	20.5%	20.7%	14.6%	11.4%	8.1%	14.0%	
	(*b*) Purchase in Another County	29.8%	33.8%	42.7%	30.1%	27.0%	46.9%	52.9%	48.9%	24.2%	
	Difference (*b-a*)	14.9%	14.3%	***32.3%***	9.6%	6.3%	32.3%	***41.4%***	***40.7%***	10.2%	**22.5%**
Sporting Goods & Hobby	**(*a*) Purchase in My County**	7.4%	22.1%	8.5%	17.9%	13.8%	7.8%	11.4%	8.1%	11.8%	
	(*b*) Purchase in Another County	22.3%	20.1%	38.4%	26.9%	31.6%	30.2%	42.9%	43.0%	31.2%	
	Difference (*b-a*)	14.9%	-1.9%	***29.9%***	9.0%	17.8%	22.4%	***31.4%***	***34.8%***	19.4%	**19.7%**

TABLE 2. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Small, Portable Appliances	**(*a*) Purchase in My County**	25.6%	33.1%	14.6%	39.1%	35.6%	22.4%	25.7%	12.6%	21.5%	
	(*b*) Purchase in Another County	36.4%	39.6%	54.9%	34.6%	36.2%	48.4%	56.4%	58.5%	34.9%	
	Difference (*b-a*)	10.7%	6.5%	***40.2%***	-4.5%	0.6%	26.0%	***30.7%***	***45.9%***	13.4%	**18.9%**
Children's Clothing	**(*a*) Purchase in My County**	3.3%	4.5%	1.8%	4.5%	4.6%	4.2%	2.9%	0.7%	4.8%	
	(*b*) Purchase in Another County	9.9%	9.7%	24.4%	17.3%	16.7%	16.1%	28.6%	18.5%	10.8%	
	Difference (*b-a*)	6.6%	5.2%	***22.6%***	12.8%	12.1%	12.0%	***25.7%***	***17.8%***	5.9%	**13.4%**
Dental Health	**(*a*) Purchase in My County**	57.0%	16.2%	60.4%	73.7%	33.9%	26.6%	35.7%	38.5%	7.5%	
	(*b*) Purchase in Another County	37.2%	70.1%	28.7%	18.6%	52.3%	60.9%	56.4%	55.6%	72.0%	
	Difference (*b-a*)	-19.8%	***53.9%***	-31.7%	-55.1%	18.4%	***34.4%***	20.7%	17.0%	***64.5%***	**11.4%**
Toys	**(*a*) Purchase in My County**	18.2%	11.7%	9.1%	18.6%	14.9%	8.9%	12.1%	8.1%	14.0%	
	(*b*) Purchase in Another County	23.1%	17.5%	30.5%	21.2%	19.5%	24.5%	36.4%	27.4%	17.7%	
	Difference (*b-a*)	5.0%	5.8%	***21.3%***	2.6%	4.6%	15.6%	***24.3%***	***19.3%***	3.8%	**11.4%**

TABLE 2. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Home Office Supplies	**(*a*) Purchase in My County**	21.5%	18.2%	43.9%	40.4%	27.0%	26.6%	19.3%	18.5%	31.2%	
	(*b*) Purchase in Another County	37.2%	44.2%	37.8%	27.6%	34.5%	38.0%	47.1%	48.1%	26.3%	
	Difference (*b-a*)	15.7%	***26.0%***	-6.1%	-12.8%	7.5%	11.5%	***27.9%***	***29.6%***	-4.8%	**10.5%**
Cell Phone	**(*a*) Purchase in My County**	6.6%	43.5%	26.8%	55.1%	35.1%	14.1%	35.7%	40.7%	41.4%	
	(*b*) Purchase in Another County	50.4%	36.4%	46.3%	23.1%	36.2%	62.0%	54.3%	45.9%	29.6%	
	Difference (*b-a*)	***43.8%***	-7.1%	***19.5%***	-32.1%	1.1%	***47.9%***	18.6%	5.2%	-11.8%	**9.5%**
Large Appliances	**(*a*) Purchase in My County**	53.7%	65.6%	17.1%	46.2%	51.1%	48.4%	23.6%	20.7%	37.1%	
	(*b*) Purchase in Another County	36.4%	24.0%	66.5%	50.6%	39.7%	38.5%	70.0%	67.4%	51.1%	
	Difference (*b-a*)	-17.4%	-41.6%	***49.4%***	4.5%	-11.5%	-9.9%	***46.4%***	***46.7%***	14.0%	**9.0%**

TABLE 3. STRATUM 3 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING

	County	Cloud	Mitchell	Ottawa	Pawnee	Phillips	Russell	Sherman	Thomas	Mean Gap
	Number of Respondents	155	214	119	165	205	172	120	172	
	Number of Households	3,641	2,593	2,433	2,447	2,406	3,005	2,569	3,294	
Shoes & Boots	**(*a*) Purchase in My County**	37.4%	14.5%	4.2%	6.1%	14.1%	14.5%	29.2%	40.1%	
	(*b*) Purchase in Another County	51.0%	58.4%	70.6%	67.9%	54.1%	63.4%	38.3%	37.8%	
	Difference (*b-a*)	13.5%	43.9%	***66.4%***	***61.8%***	40.0%	***48.8%***	9.2%	-2.3%	**35.2%**
Women's Clothing	**(*a*) Purchase in My County**	49.7%	10.3%	8.4%	21.2%	16.1%	21.5%	37.5%	41.3%	
	(*b*) Purchase in Another County	45.8%	57.0%	68.9%	57.6%	54.1%	52.3%	25.8%	35.5%	
	Difference (*b-a*)	-3.9%	***46.7%***	***60.5%***	36.4%	***38.0%***	30.8%	-11.7%	-5.8%	**23.9%**
Men's Clothing	**(*a*) Purchase in My County**	34.2%	21.0%	4.2%	9.7%	19.5%	15.1%	43.3%	40.7%	
	(*b*) Purchase in Another County	41.9%	51.4%	66.4%	55.2%	51.2%	54.7%	24.2%	29.1%	
	Difference (*b-a*)	7.7%	30.4%	***62.2%***	***45.5%***	31.7%	***39.5%***	-19.2%	-11.6%	**23.3%**
Sporting Goods & Hobby	**(*a*) Purchase in My County**	26.5%	14.0%	3.4%	12.1%	7.3%	9.9%	34.2%	31.4%	
	(*b*) Purchase in Another County	35.5%	30.4%	51.3%	35.8%	26.8%	33.7%	15.0%	20.9%	
	Difference (*b-a*)	9.0%	16.4%	***47.9%***	***23.6%***	19.5%	***23.8%***	-19.2%	-10.5%	**13.8%**

TABLE 3. STRATUM 3 COUNTIES: LARGE GAP BETWEEN PURCHASING IN ANOTHER COUNTY AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cloud	Mitchell	Ottawa	Pawnee	Phillips	Russell	Sherman	Thomas	Mean Gap
	Number of Respondents	155	214	119	165	205	172	120	172	
	Number of Households	3,641	2,593	2,433	2,447	2,406	3,005	2,569	3,294	
Large Electronics	**(*a*) Purchase in My County**	38.1%	19.2%	1.7%	7.3%	19.0%	9.9%	42.5%	48.3%	
	(*b*) Purchase in Another County	23.9%	39.3%	55.5%	44.8%	27.3%	48.8%	8.3%	10.5%	
	Difference (*b-a*)	-14.2%	20.1%	***53.8%***	***37.6%***	8.3%	***39.0%***	-34.2%	-37.8%	**9.1%**
Vehicles New & Used	**(*a*) Purchase in My County**	43.2%	55.6%	5.9%	27.3%	28.8%	7.6%	61.7%	52.9%	
	(*b*) Purchase in Another County	32.3%	30.8%	76.5%	51.5%	41.5%	65.1%	22.5%	29.1%	
	Difference (*b-a*)	-11.0%	-24.8%	***70.6%***	***24.2%***	12.7%	***57.6%***	-39.2%	-23.8%	**8.3%**
Children's Clothing	**(*a*) Purchase in My County**	12.3%	1.4%	0.8%	3.6%	1.5%	4.1%	15.0%	9.9%	
	(*b*) Purchase in Another County	12.9%	17.8%	23.5%	15.2%	13.7%	19.2%	3.3%	8.7%	
	Difference (*b-a*)	0.6%	***16.4%***	***22.7%***	11.5%	12.2%	***15.1%***	-11.7%	-1.2%	**8.2%**
Large Appliances	**(*a*) Purchase in My County**	25.2%	50.9%	8.4%	33.3%	61.0%	27.3%	60.8%	74.4%	
	(*b*) Purchase in Another County	57.4%	40.2%	78.2%	58.2%	23.4%	64.5%	20.8%	16.3%	
	Difference (*b-a*)	***32.3%***	-10.7%	***69.7%***	24.8%	-37.6%	***37.2%***	-40.0%	-58.1%	**2.2%**

TABLE 4. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Women's Clothing	**(*a*) Purchase in My County**	12.5%	12.5%	3.7%	25.4%	5.0%	11.2%	9.8%	4.9%	2.6%	
	(*b*) Purchase Online/By Phone	45.5%	40.6%	44.8%	36.4%	46.5%	42.7%	51.2%	48.3%	53.2%	
	Difference (*b-a*)	33.0%	28.1%	41.1%	11.0%	***41.6%***	31.5%	41.5%	***43.4%***	***50.6%***	**35.8%**
Shoes & Boots	**(*a*) Purchase in My County**	2.7%	4.7%	0.6%	18.6%	2.0%	4.9%	3.7%	4.9%	2.6%	
	(*b*) Purchase Online/By Phone	28.6%	36.7%	39.3%	31.4%	45.5%	48.3%	37.8%	37.1%	50.6%	
	Difference (*b-a*)	25.9%	32.0%	38.7%	12.7%	***43.6%***	***43.4%***	34.1%	32.2%	***48.1%***	**34.5%**
Men's Clothing	**(*a*) Purchase in My County**	5.4%	8.6%	2.5%	11.0%	4.0%	2.1%	6.1%	4.2%	3.9%	
	(*b*) Purchase Online/By Phone	39.3%	28.1%	30.1%	33.1%	42.6%	37.8%	40.2%	37.1%	39.0%	
	Difference (*b-a*)	33.9%	19.5%	27.6%	22.0%	***38.6%***	***35.7%***	34.1%	32.9%	***35.1%***	**31.1%**
Books	**(*a*) Purchase in My County**	8.9%	14.1%	8.6%	10.2%	8.9%	11.9%	3.7%	9.8%	11.7%	
	(*b*) Purchase Online/By Phone	34.8%	30.5%	30.1%	31.4%	43.6%	41.3%	39.0%	35.7%	48.1%	
	Difference (*b-a*)	25.9%	16.4%	21.5%	21.2%	***34.7%***	29.4%	***35.4%***	25.9%	***36.4%***	**27.4%**

TABLE 4. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING (CONTINUED)

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Sporting Goods & Hobby	**(*a*) Purchase in My County**	2.7%	11.7%	2.5%	5.9%	3.0%	21.0%	6.1%	5.6%	6.5%	
	(*b*) Purchase Online/By Phone	21.4%	18.8%	20.2%	20.3%	22.8%	23.1%	25.6%	23.1%	27.3%	
	Difference (*b-a*)	18.8%	7.0%	17.8%	14.4%	***19.8%***	2.1%	***19.5%***	17.5%	***20.8%***	**15.3%**
Children's Clothing	**(*a*) Purchase in My County**	4.5%	3.1%	1.2%	4.2%	1.0%	1.4%	2.4%	1.4%	2.6%	
	(*b*) Purchase Online/By Phone	15.2%	14.1%	9.8%	13.6%	13.9%	18.9%	15.9%	14.0%	22.1%	
	Difference (*b-a*)	10.7%	10.9%	8.6%	9.3%	12.9%	***17.5%***	***13.4%***	12.6%	***19.5%***	**12.8%**
Toys	**(*a*) Purchase in My County**	8.9%	19.5%	8.6%	6.8%	12.9%	17.5%	11.0%	15.4%	9.1%	
	(*b*) Purchase Online/By Phone	29.5%	18.8%	24.5%	22.9%	26.7%	24.5%	22.0%	23.8%	19.5%	
	Difference (*b-a*)	***20.5%***	-0.8%	***16.0%***	***16.1%***	13.9%	7.0%	11.0%	8.4%	10.4%	**11.4%**
Small Electronics	**(*a*) Purchase in My County**	10.7%	15.6%	5.5%	3.4%	19.8%	30.1%	17.1%	18.2%	7.8%	
	(*b*) Purchase Online/By Phone	22.3%	21.9%	22.7%	22.0%	23.8%	25.9%	24.4%	24.5%	23.4%	
	Difference (*b-a*)	11.6%	6.3%	***17.2%***	***18.6%***	4.0%	-4.2%	7.3%	6.3%	***15.6%***	**9.2%**

TABLE 4. STRATUM 1 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING (CONTINUED)

	County	Gove	Graham	Jewell	Lincoln	Logan	Rawlins	Sheridan	Trego	Wallace	Mean Gap
	Number of Respondents	112	128	163	118	101	143	82	143	77	
	Number of Households	1,260	1,252	1,386	1,305	1,144	1,169	1,080	1,353	651	
Game Systems	**(*a*) Purchase in My County**	0.0%	0.8%	0.6%	0.0%	4.0%	0.7%	1.2%	2.1%	1.3%	
	(*b*) Purchase Online/By Phone	11.6%	9.4%	8.0%	11.0%	13.9%	9.8%	7.3%	6.3%	13.0%	
	Difference (*b-a*)	***11.6%***	8.6%	7.4%	***11.0%***	9.9%	9.1%	6.1%	4.2%	***11.7%***	**8.8%**

TABLE 5. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Shoes & Boots	**(*a*) Purchase in My County**	5.0%	3.2%	10.4%	16.7%	10.3%	7.3%	2.9%	3.7%	12.9%	
	(*b*) Purchase Online/By Phone	51.2%	42.2%	38.4%	41.7%	46.6%	42.2%	40.0%	31.1%	43.0%	
	Difference (*b-a*)	***46.3%***	***39.0%***	28.0%	25.0%	36.2%	34.9%	***37.1%***	27.4%	30.1%	**33.8%**
Women's Clothing	**(*a*) Purchase in My County**	7.4%	16.2%	17.1%	18.6%	16.7%	12.5%	7.9%	11.9%	18.3%	
	(*b*) Purchase Online/By Phone	55.4%	40.3%	38.4%	52.6%	48.9%	50.0%	50.7%	32.6%	50.5%	
	Difference (*b-a*)	**47.9%**	24.0%	21.3%	34.0%	32.2%	**37.5%**	**42.9%**	20.7%	32.3%	**32.5%**
Men's Clothing	**(*a*) Purchase in My County**	8.3%	4.5%	13.4%	23.7%	11.5%	6.8%	4.3%	8.1%	22.6%	
	(*b*) Purchase Online/By Phone	40.5%	38.3%	28.7%	44.2%	39.7%	39.1%	39.3%	28.1%	41.4%	
	Difference (*b-a*)	32.2%	***33.8%***	15.2%	20.5%	28.2%	***32.3%***	***35.0%***	20.0%	18.8%	**26.2%**
Books	**(*a*) Purchase in My County**	15.7%	10.4%	8.5%	9.0%	11.5%	11.5%	10.7%	10.4%	11.8%	
	(*b*) Purchase Online/By Phone	43.0%	35.1%	31.7%	39.7%	38.5%	30.2%	37.9%	34.1%	40.9%	
	Difference (*b-a*)	***27.3%***	24.7%	23.2%	***30.8%***	27.0%	18.8%	27.1%	23.7%	***29.0%***	**25.7%**

TABLE 5. STRATUM 2 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cheyenne	Decatur	Ellsworth	Norton	Osborne	Republic	Rooks	Rush	Smith	Mean Gap
	Number of Respondents	121	154	164	156	174	192	140	135	186	
	Number of Households	1,623	1,414	2,390	1,865	1,687	2,176	2,167	1,448	1,664	
Children's Clothing	**(*a*) Purchase in My County**	3.3%	4.5%	1.8%	4.5%	4.6%	4.2%	2.9%	0.7%	4.8%	
	(*b*) Purchase Online/By Phone	19.0%	11.0%	14.6%	18.6%	19.5%	15.1%	23.6%	11.9%	15.1%	
	Difference (*b-a*)	***15.7%***	6.5%	12.8%	14.1%	***14.9%***	10.9%	***20.7%***	11.1%	10.2%	**13.0%**
Toys	**(*a*) Purchase in My County**	18.2%	11.7%	9.1%	18.6%	14.9%	8.9%	12.1%	8.1%	14.0%	
	(*b*) Purchase Online/By Phone	27.3%	19.5%	23.2%	25.6%	29.3%	25.5%	27.9%	15.6%	26.9%	
	Difference (*b-a*)	9.1%	7.8%	14.0%	7.1%	***14.4%***	***16.7%***	***15.7%***	7.4%	12.9%	**11.7%**
Sporting Goods & Hobby	**(*a*) Purchase in My County**	7.4%	22.1%	8.5%	17.9%	13.8%	7.8%	11.4%	8.1%	11.8%	
	(*b*) Purchase Online/By Phone	28.1%	13.6%	17.1%	25.0%	23.0%	21.4%	21.4%	21.5%	22.0%	
	Difference (*b-a*)	***20.7%***	-8.4%	8.5%	7.1%	9.2%	***13.5%***	10.0%	***13.3%***	10.2%	**9.3%**
Small Electronics	**(*a*) Purchase in My County**	14.9%	19.5%	10.4%	20.5%	20.7%	14.6%	11.4%	8.1%	14.0%	
	(*b*) Purchase Online/By Phone	31.4%	20.8%	23.8%	28.2%	24.1%	20.8%	21.4%	19.3%	27.4%	
	Difference (*b-a*)	***16.5%***	1.3%	***13.4%***	7.7%	3.4%	6.3%	10.0%	11.1%	***13.4%***	**9.2%**

TABLE 6. STRATUM 3 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING

	County	Cloud	Mitchell	Ottawa	Pawnee	Phillips	Russell	Sherman	Thomas	Mean Gap
	Number of Respondents	155	214	119	165	205	172	120	172	
	Number of Households	3,641	2,593	2,433	2,447	2,406	3,005	2,569	3,294	
Books	**(*a*) Purchase in My County**	26.5%	8.4%	5.9%	7.9%	10.7%	17.4%	28.3%	18.0%	
	(*b*) Purchase Online/By Phone	39.4%	37.9%	33.6%	41.2%	35.6%	33.1%	37.5%	44.8%	
	Difference (*b-a*)	12.9%	***29.4%***	***27.7%***	***33.3%***	24.9%	15.7%	9.2%	26.7%	**22.5%**
Shoes & Boots	**(*a*) Purchase in My County**	37.4%	14.5%	4.2%	6.1%	14.1%	14.5%	29.2%	40.1%	
	(*b*) Purchase Online/By Phone	32.9%	44.4%	36.1%	36.4%	37.1%	36.0%	45.0%	39.0%	
	Difference (*b-a*)	-4.5%	***29.9%***	***31.9%***	***30.3%***	22.9%	21.5%	15.8%	-1.2%	**18.3%**
Women's Clothing	**(*a*) Purchase in My County**	49.7%	10.3%	8.4%	21.2%	16.1%	21.5%	37.5%	41.3%	
	(*b*) Purchase Online/By Phone	37.4%	52.8%	43.7%	35.8%	42.9%	37.8%	47.5%	45.3%	
	Difference (*b-a*)	-12.3%	***42.5%***	***35.3%***	14.5%	***26.8%***	16.3%	10.0%	4.1%	**17.2%**
Men's Clothing	**(*a*) Purchase in My County**	34.2%	21.0%	4.2%	9.7%	19.5%	15.1%	43.3%	40.7%	
	(*b*) Purchase Online/By Phone	26.5%	43.0%	27.7%	35.2%	34.1%	32.0%	40.8%	37.8%	
	Difference (*b-a*)	-7.7%	***22.0%***	***23.5%***	***25.5%***	14.6%	16.9%	-2.5%	-2.9%	**11.2%**

TABLE 6. STRATUM 3 COUNTIES: LARGE GAP BETWEEN PURCHASING ONLINE/BY PHONE AND IN-COUNTY PURCHASING (CONTINUED)

	County	Cloud	Mitchell	Ottawa	Pawnee	Phillips	Russell	Sherman	Thomas	Mean Gap
	Number of Respondents	155	214	119	165	205	172	120	172	
	Number of Households	3,641	2,593	2,433	2,447	2,406	3,005	2,569	3,294	
Toys	**(*a*) Purchase in My County**	28.4%	15.4%	7.6%	9.1%	8.8%	16.3%	36.7%	34.9%	
	(*b*) Purchase Online/By Phone	21.9%	30.8%	24.4%	25.5%	21.5%	23.3%	14.2%	27.3%	
	Difference (*b-a*)	-6.5%	***15.4%***	***16.8%***	***16.4%***	12.7%	7.0%	-22.5%	-7.6%	**4.0%**

Retail Activity and Retail-Associated Indicators

Summary

- Retail workers generally earn less than the county average employee compensation. In only 8 counties do retail workers earn more than the county average employee compensation.
- Counties with smaller population tend to have fewer retail sales sectors with businesses.
- Ten of the counties in the region have no city large enough to have a calculated city trade pull factor.
- Only 7 of the counties in the region have a trade pull factor greater than 1.0, indicating those 7 counties attract more retail trade than they lose to areas outside the county. Those counties include: Thomas (1.51), Ellis (1.44), Saline (1.36), Sherman (1.26), Gove (1.22), Barton (1.12), and Mitchell (1.16).
- Only 6 of the counties in the region had an increase in population from the 2010 Census to the 2020 Census. Those counties include: Wallace (1.8%), Ellis (1.7%), Rawlins (1.7%), Gove (0.9%), Thomas (0.4%), and Logan (0.2%).
- Residents in counties have multiple identities, for example: county, township, school district, state legislative district, primary highway, time zone, or occupation. This may influence their patterns of gathering (cohorts) and shopping.

Data

Retail business is an umbrella term that covers businesses that sell goods or services to final consumers. This diversity means that the more retail businesses associated with a community, the more likely that people will shop locally. For example, a community with only an isolated restaurant is less appealing than one that has two or more restaurants. Because if one restaurant is too busy, then another may have an available table. Likewise, a community with more types of retail is more likely to attract consumers than one with fewer types of retail merchandise. Competition is an expected part of every enterprise and thus growth and change are necessary for successful enterprises.

All of the data used in the county-level reports and this regional analysis was collected by other parties for their own specific needs and purposes. All of the data is publicly available. 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 might desire. For example, much of the data is collected at the county level. 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.

There is a time lag between the collection and the publishing of economic and demographic data. Such data is also generally aggregated to protect the privacy of individuals and businesses. The smallest level of aggregation is usually at the county level in geographic terms; data by business classification (NAICS) may be suppressed at the county level if the number of firms is limited; and finally, demographic data is usually reported by characteristic (gender, age group, race, *et cetera*). Because the underlying factors driving both economic activity and demographic trends change relatively slowly, we use the most current available data rather than limiting ourselves to the most recent year in which all the data are available. The Implan® model is well known and widely used by researchers and government agencies.

Data for this report was estimated through the use of external data resources. These external data sources included private data sources such as IMPLAN® and public sources such as: U.S. Government agencies, State of Kansas Departments, and County Offices and Departments. For all the estimated data the report used very conservative estimates when there was a range of values from an outside source or between sources.

Regional Economic Data

Regional economic data provides a birds' eye view of the 29 counties examined in this research project. Three measures are reported when possible. The region as a whole is the sum of a measure across all 29 counties. The county maximum is the largest value for that measure when measured at the county level. The county minimum is the smallest value for that measure when measured at the county level.

TABLE 7. GRP AND INCOME

	Gross Regional Product	Total Personal Income	Per Capita Income (2020 dollars)
Region as a Whole	$10,609,565,485	$11,536,587,507	$52,201
County Maximum	$2,952,209,120	$2,855,995,545	$70,868
County Minimum	$76,488,497	$107,153,112	$36,174

Table 7 shows the gross regional product for the 29-county region. The gross regional product is a measure of the entire economy within a particular area.

The second column shows the total personal income from all sources again for the 29-county region as a whole and with the county that has the highest total personal income and the county that has the lowest total personal income. Total personal income represents all the income that is available for people to spend.

The third column in Table 7 shows the per capita income in 2020 dollars for the region as a whole is slightly over $52,000. For the county that has the highest per capita income it's just under $71,000 for the county that has the lowest per capita income it's slightly above $36,000. Clearly there is a wide variation between the minimum county and the maximum county throughout the region. However, note that the per capita income shows less of a spread than the dollar amounts associated with total personal income.

TABLE 8. EMPLOYMENT

	Total Employment	Total Annual Payroll, 2020 ($000)	Total Employee Compensation	Average Employee Compensation
Region as a Whole	155,834	$2,287,876	$5,320,711,877	NA
County Maximum	37,950	$469,957	$1,609,756,414	$42,418
County Minimum	1,115	$11,205	$29,121,617	$19,445

Table 8 looks at employment and income rather broadly. The first column, total employment, counts everyone who is a worker for pay. The second column shows the total annual payroll for the region and the third column, total employee compensation, adds in all of those items that fall under the category of benefits. And finally, the fourth column shows the average employee compensation in the county with the highest average employee compensation and in the county with the lowest average employee compensation for a region as a whole. For the region as a whole the data did not allow a calculation of average employee compensation. Again noticed that when employee compensation is adjusted for the number of employees the results are closer together for the maximum and the minimum than when they are simply dollar amounts for the whole county.

TABLE 9. RETAIL SALES - COUNTY LEVEL

	2021 KS Sales Tax Collections (County)	County Trade Pull Factor (2021)	Total Sales Subject to KS Sales Tax (County)
Region as a Whole	$241,416,753	NA	$3,714,103,894
County Maximum	$76,300,473	1.51	$1,173,853,431
County Minimum	$976,151	0.38	$15,017,708

Table 9 continues to drill down and focuses on retail sales based on counties for the region as a whole. Kansas sales tax collections is simply the sum of all of the Kansas sales tax collections in the 29-county region. The maximum amount of sales tax collected in a county reflects the largest retail activity. The county trade pull factor for this county is 1.51 while the trade pull factor for the county with the minimum Kansas sales tax collections is 0.38. The county trade pull factor is calculated by the depart Kansas Department of revenue. There is no county trade pull factor for the 29-county region and the last column simply tells us how many sales subject to the Kansas sales tax occurred in the region as a whole.

TABLE 10. RETAIL SALES - SELECTED CITIES

	2021 KS Sales Tax Collections (City)	City Trade Pull Factor (2021)	Total Sales Subject to KS Sales Tax (City)
Region as a Whole	$188,726,591	NA	$2,903,486,015
City Maximum	$72,936,141	1.93	$1,122,094,477
City Minimum	$1,100,236	0.52	$16,926,708

Table 10 presents the same information that is in Table 9, except that it at the city level rather than the county level. The city level data is only available for a subset of the counties.

TABLE 11. RETAIL SALES - EMPLOYEES

	Number of Industries	Number of Retail Business Employees	Retail Business Employees as Percentage of Total Employees	Average Retail Employee Compensation	Retail Employee Compensation as Percentage of Total Compensation
Region as a Whole	4,424	13,021	8.4%	NA	NA
County Maximum	227	3,598	11.5%	$51,073	15.7%
County Minimum	115	40	3.5%	$21,950	3.1%

Table 11 presents information about retail sales employees. Employee level data is more complete than firm specific data. The number of industries, column one, shows the number of different industries in a county based on schema that uses 546 categories to measure an economy. Twelve categories are used to measure retail sales. The number of retail business employees at the county level varies from a low of 40 people to a high of 3,598 people. This variation carries over to employee compensation.

TABLE 12. WHOLESALE SALES - EMPLOYEES

	Number of Industries	Number of Wholesale Business Employees	Wholesale Business Employees as Percentage of Total Employees	Average Wholesale Employee Compensation	Wholesale Employee Compensation as Percentage of Total Compensation
Region as a Whole	4,424	6,063		$1,762,449	
County Maximum	227	1,696	9.5%	$91,643	21.9%
County Minimum	115	35	1.3%	$29,659	1.3%

Table 12 presents information about wholesale employees. Retail businesses rely on wholesale suppliers. Ten categories are used to measure the wholesale sector. The wholesale sector tends to have lower employment levels, but higher compensation levels.

TABLE 13. HOUSEHOLDS

	Number of Households	Household Size, 2016 - 2020	Persons under 18 (Percentage)	Persons over 65 (Percentage)
Region as a Whole	95,836			
County Maximum	22,440	2.43	24.8%	30.3%
County Minimum	655	1.94	16.4%	16.0%

Table 13 brings our focus to the characteristics of the people who live in the 29-county region. Economic activity is the result of the actions of people and it is helpful to get a picture of who these people are. The county with the most households has 21,784 more households than the county with the least. The percentage of persons under 18 years of age and the percentage of person over 65 show considerable difference between the maximum and minimum.

TABLE 14. POPULATION

	2020 Census Population	2010 Census Population	Change in Population 2010 to 2020	Percentage Change 2010 to 2020	Population Density (Persons per Square Mile)
Region as a Whole	221,003.00	230,185.00	(9,182.00)		8.83
County Maximum	54,303.00	55,606.00	482.00	1.8%	50.53
County Minimum	1,512.00	1,485.00	(2,181.00)	-11.7%	3.98

Table 14 shows an overall decline in population and a population density for the region of less than 9 persons per square mile. The most densely populated county has only 50.5 persons per square mile, slightly over half of the average density of the U.S. (93.7).

Table 15. Education, Gender, and Ethnicity

	Bachelors Degree or higher, Percentage of Persons Age 25 years+ 2016 - 2020	Percentage Female	Ethnicity (White, non Hispanic) Percentage
Region as a Whole	NA	NA	NA
County Maximum	38.0%	51.3%	94.9%
County Minimum	18.4%	43.3%	81.0%

Table 15 shows that the level of education varies substantially across the region. Ethnicity and gender are fairly consistent across the 29-county region.