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Economic Trends Report: Lawrence

Prepared by

Luke Middleton
Research Economist

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Genna M. Hurd
Co-Director, KCCED

Steven Maynard-Moody
Director, Policy Research Institute

Foreword

The Kansas Center for Community Economic Development (KCCED) is a joint center of the Policy Research Institute at the University of Kansas and the Kansas Center for Rural Initiatives at Kansas State University. Its purpose is to enhance economic development efforts by bringing university expertise to rural Kansas.

KCCED is funded by a grant from the Economic Development Administration of the U.S. Department of Commerce. The statements, findings, and conclusions of this report are those of the authors and do not necessarily reflect the views of the U.S. Government, the University of Kansas, or any other individual or organization.

DOUGLAS COUNTY



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Economic Trends: Lawrence

Introduction

The following report is an objective look at several key economic trends occurring in Lawrence over the last few decades. We look at variables categorized under the following areas:

- population and housing,
- employment,
- income,
- taxes,
- and education.

Throughout the report, Lawrence's performance is compared with the performance of Baldwin, Eudora, Lecompton, and Douglas County overall, as well as the state of Kansas in some occasions. It is by no means a comprehensive analysis of economic trends facing Lawrence but rather an overview of some key economic and demographic variables.

POPULATION AND HOUSING

In every community, population size and economic activity are closely related. Population is directly related to employment opportunities within the area, wage differentials between regions, and a community's overall economic and social conditions. Growing communities are more likely to adapt successfully to a changing economic environment than areas with constant or decreasing population. New residents in a community mean additional consumers, taxpayers, and suppliers of labor. Without population growth, communities face problems of a tightening labor market, lack of new customers for businesses, a shrinking tax base, and an overall decline in economic activity. Generally, areas of population growth are also areas of economic growth, whereas areas of population loss suffered previous economic decline and restructuring.

Characteristics of the region's population are regarded as indicators of economic conditions and economic potential. Past population changes indicate economic trends in the community and can be compared to other cities, as well as the statewide and national averages.

Population and Housing: Key Findings

- The population of Lawrence has grown every decade for over 100 years. The 2000 Decennial Census showed Lawrence's population to be at 80,098, almost double what it was only 30 years ago. (Table 1 and 2)
- Population in Lawrence grew nearly 22 percent from 1990 to 2000. This was almost triple the population growth rate of the state (8.5 percent) and nation (8.7 percent). Of the comparative cities, only Eudora's growth rate exceeded it, at 43 percent. In any case, Lawrence has never had a problem attracting new residents. (Table 2 and Figure 1, Map 2)
- The largest age group segment in Lawrence in 2000 was made up of people in the 18-24 year-old range, though this was down slightly percentage-wise since 1990 (from 34 percent then to about 31 percent in 2000). In percentage terms as well as in absolute numbers, the cohort which grew the most in the last decade were the 45-64 year-olds: in 1990 their numbers stood at 7,544, by 2000 this had grown to 12,103. Partly this trend can be attributed to the aging baby-boomer population, but mostly reflects new in-migrants. (Table 3a and 3b, Figure 2)
- From 1980 to 2000, the percentage of owner-occupied housing in Lawrence dropped slightly from 45 to 44 percent of total housing. Renter-occupied housing increased from 48 to 52 percent, indicating the growth of student housing as well as the increased popularity of duplexes for young families. (Table 4)

Table 1
Population Totals and Growth Rates
Lawrence and Kansas

Year	Lawrence		Kansas	
	Population Total	Growth Rate	Population Total	Growth Rate
1910	12,374		1,690,949	
1920	12,456	0.7	1,769,257	4.6
1930	13,726	10.2	1,880,999	6.3
1940	14,390	4.8	1,801,028	-4.3
1950	23,351	62.3	1,905,299	5.8
1960	32,858	40.7	2,178,611	14.3
1970	45,698	39.1	2,249,071	3.2
1980	52,738	15.4	2,364,236	5.1
1990	65,657	24.5	2,477,588	4.8
1991*	66,630	1.5	2,495,209	0.7
1992*	67,396	1.1	2,526,042	1.2
1993*	68,688	1.9	2,547,605	0.9
1994*	69,752	1.5	2,569,118	0.8
1995*	71,726	2.8	2,586,942	0.7
1996*	73,137	2.0	2,598,266	0.4
1997*	76,055	4.0	2,616,339	0.7
1998*	77,488	1.9	2,638,667	0.9
1999*	78,911	1.8	2,654,052	0.6
2000	80,098	1.5	2,688,418	1.3

* Estimates

Source: U.S. Bureau of the Census.

Table 2
Population Growth Rates
Lawrence, Comparative Cities and County, Kansas, and U.S.
1970-2000

<u>Year</u>	<u>1970-1980</u>	<u>1980-1990</u>	<u>1990-2000</u>
Lawrence	15.4	24.5	22.0
Baldwin	12.3	2.9	16.8
Eudora	41.7	2.5	43.3
Lecompton	32.7	12.3	-6.0
Douglas County	16.8	20.9	22.2
Kansas	5.1	4.8	8.5
United States	11.4	9.8	8.7

Source: U.S. Bureau of the Census, "1980 Census of Population," PC90-1-A; "1990 Decennial Census"; "2000 Decennial Census."

Figure 1
Rates of Population Change
Lawrence and Comparative Cities
1970-2000

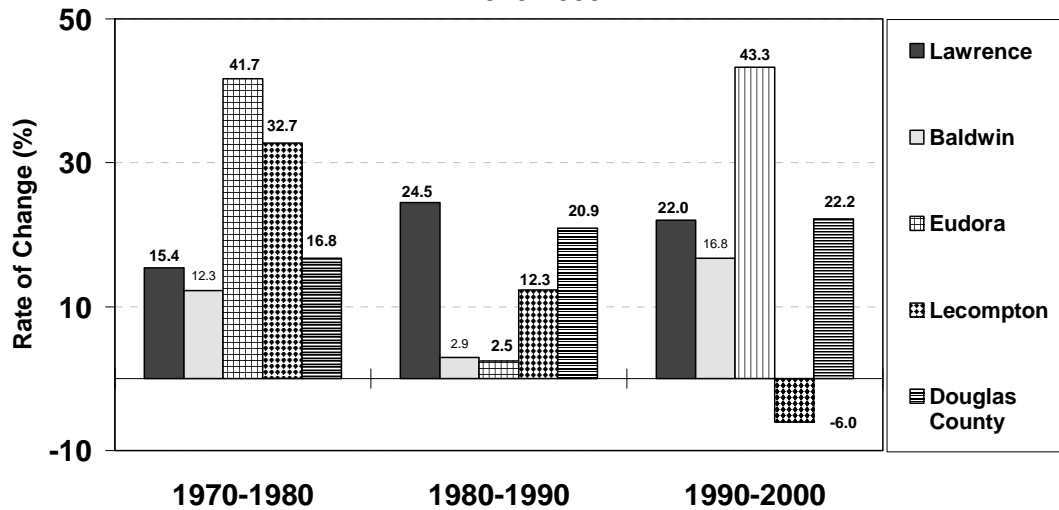


Table 3a
Population by Selected Age Groups
Lawrence and Kansas
1990-2000

	Age:	<u>0-4</u>	<u>5-17</u>	<u>18-24</u>	<u>25-44</u>	<u>45-64</u>	<u>65 and over</u>
Lawrence	1990	3,955	8,493	20,853	20,081	7,544	4,731
	2000	4,345	10,526	24,569	22,800	12,103	5,755
Kansas	1990	189,988	472,267	255,195	776,430	443,877	342,863
	2000	188,708	524,285	275,592	769,204	574,400	356,229

Source: U.S. Bureau of the Census

Table 3b
Population by Selected Age Groups as Percent of Total
Lawrence and Kansas
1990-2000

	Age:	<u>0-4</u>	<u>5-17</u>	<u>18-24</u>	<u>25-44</u>	<u>45-64</u>	<u>65 and over</u>
Lawrence	1990	6.0 %	12.9 %	31.8 %	30.6 %	11.5 %	7.2 %
	2000	5.4	13.1	30.7	28.5	15.1	7.2
Kansas	1990	7.7	19.1	10.3	31.3	17.9	13.8
	2000	7.0	19.5	10.3	28.6	21.4	13.3

Source: U.S. Bureau of the Census

Figure 2
Population by Age Group as Percent of Total Population
Lawrence
1990-2000

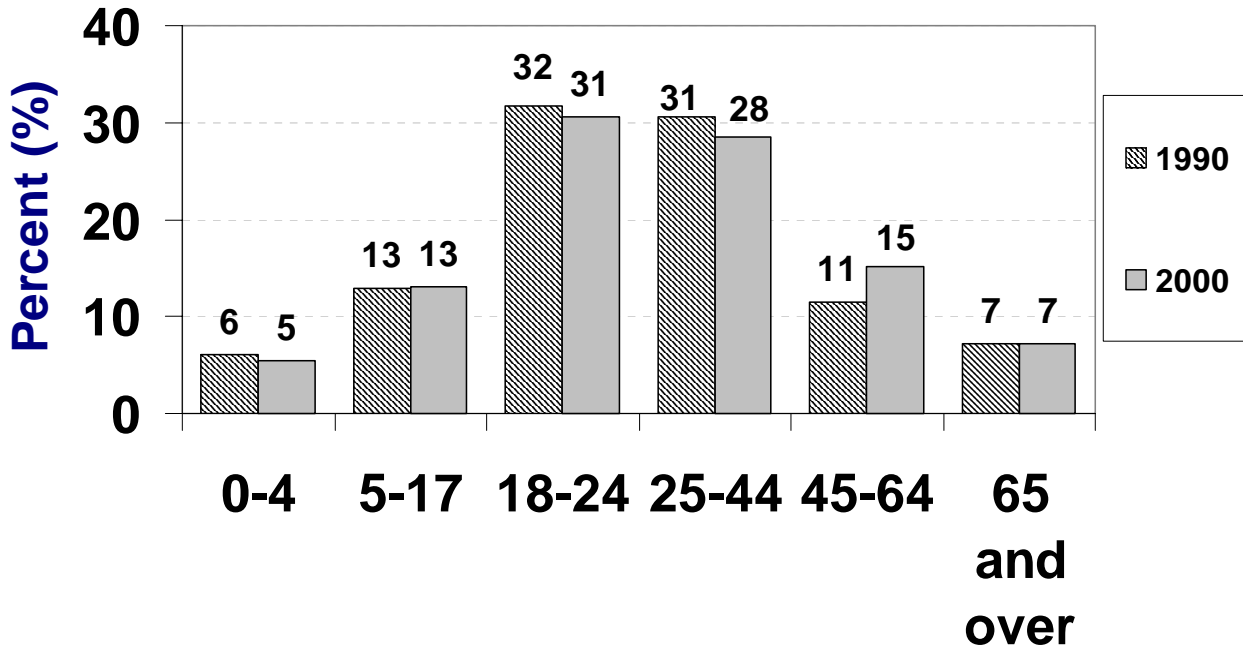


Table 4
Percent Types of Housing
Lawrence, Comparative Cities and County
1980-2000

	1980			2000		
	<u>% Owner-Occupied</u>	<u>% Renter-Occupied</u>	<u>% Vacant</u>	<u>% Owner-Occupied</u>	<u>% Renter-Occupied</u>	<u>% Vacant</u>
Lawrence	45%	48%	7%	44%	52%	4%
Baldwin	62	32	7	62	30	8
Eudora	69	26	5	59	38	3
Lecompton	74	19	7	78	20	2
Douglas County	51	43	7	50	46	4

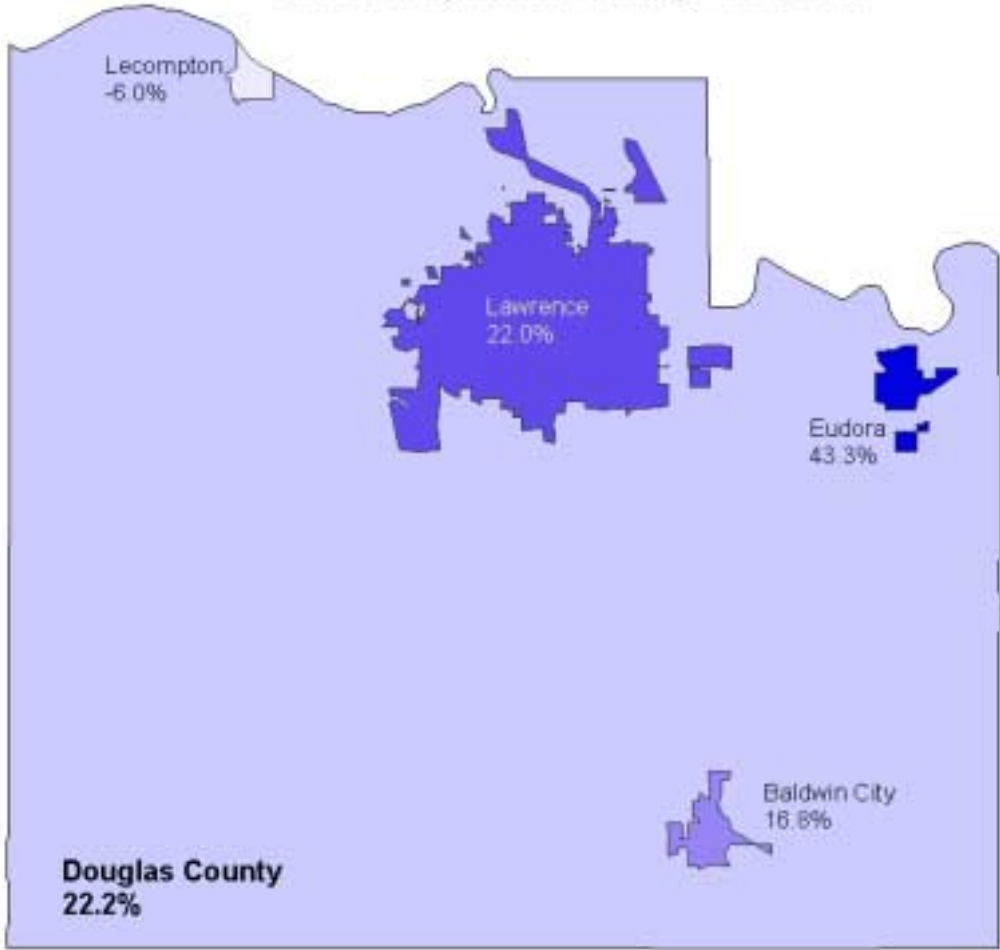
Source: U.S. Bureau of the Census

Map 1
Percent Population Change 1980-1990



Source: Policy Research Institute, The University of Kansas; data from the U.S. Census Bureau.

Map 2
Percent Population Change 1990-2000



Source: Policy Research Institute, The University of Kansas; data from the U.S. Census Bureau.

EMPLOYMENT

Economic vitality of every community is reflected in the employment situation. This section compares the key employment measurements such as labor force size and unemployment in the Lawrence area with its comparative cities.

The number of people who are either working or willing to work determines the size of the labor force. This number is influenced not only by the size of population but also by the perceptions of individuals that suitable job opportunities exist within the community. Diverse healthy economies tend to offer the widest variety of job opportunities and thereby attract a large number of job seekers, which increases the size of the labor force. The unemployment level reflects the amount of economic activity within an area and how well the local market is able to match the supply and demand for labor.

Employment: Key Findings

- Between 1990 and 2000 average annual employment in Lawrence (U.S. Bureau of the Census data by place of residence) grew 36 percent. This far exceeded the state's employment growth rate, and was higher among all the comparative cities save Eudora, which has experienced rapid growth lately. In 2000 the number of employed in Lawrence stood at 44,705. This does not reflect the total number of jobs available in Lawrence, but rather the number of people who live there and are employed, either there or elsewhere. (Tables 5a and 5b, Figure 3)
- Another way to break down employment is to compare the number of persons who are employed with those looking for employment. In 2000, the unemployment rate in Lawrence was 5.1 percent, the highest of all the comparative cities, and higher than the county and state. In 2000 the first indications of an economic slowdown were becoming apparent, and these tend to affect metropolitan areas before rural communities, of which a good deal of Kansas consists of. However, even then the unemployment rate was not unreasonable, and Lawrence is known for a very strong employment base. (Table 5a and Map 3)
- Employment details can also be broken down by industry. However, due to a new industry classification system, data from 2000 can not be compared to previous years, so a per-industry growth analysis can not be conducted. Nevertheless, in 2000 about 30 percent of the jobs in Lawrence were in the Education sector, most of them of course at the University of Kansas. Following that were retail and service jobs which together accounted for roughly another third of total employment. The rest of the categories were relatively small, all less than ten percent of employment and most less than five. (Tables 6a and 6b, Figure 4)

Table 5a
Labor Market Summary
Lawrence, Comparative Cities and County, Kansas
2000

	<u>Civilian Labor Force</u>	<u>Employed</u>	<u>Unemployed</u>	<u>Unemployment Rate</u>
Lawrence	47,128	44,705	2,423	5.1
Baldwin	1,816	1,785	31	1.7
Eudora	2,234	2,137	97	4.3
Lecompton	302	290	12	4.0
Douglas County	57,890	55,212	2,678	4.6
Kansas	1,374,698	1,316,283	58,415	4.2

Source: U.S. Bureau of the Census

Table 5b
Labor Market Summary
Percent Change
Lawrence, Comparative Cities and County, Kansas
1990-2000

	<u>% Percent Change, 1990-2000</u>							
	<u>Civilian Labor Force</u>		<u>Employed</u>		<u>Unemployed</u>		<u>Unemployment Rate</u>	
Lawrence	35	%	36	%	18	%	-13	%
Baldwin	23		25		-35		-47	
Eudora	48		48		52		2	
Lecompton	-2		4		-59		-58	
Douglas County	29		30		21		-7	
Kansas	8		8		2		-5	

Source: U.S. Bureau of the Census

Figure 3
Employment Growth Rates
Lawrence, Comparative Cities and County
1990-2000

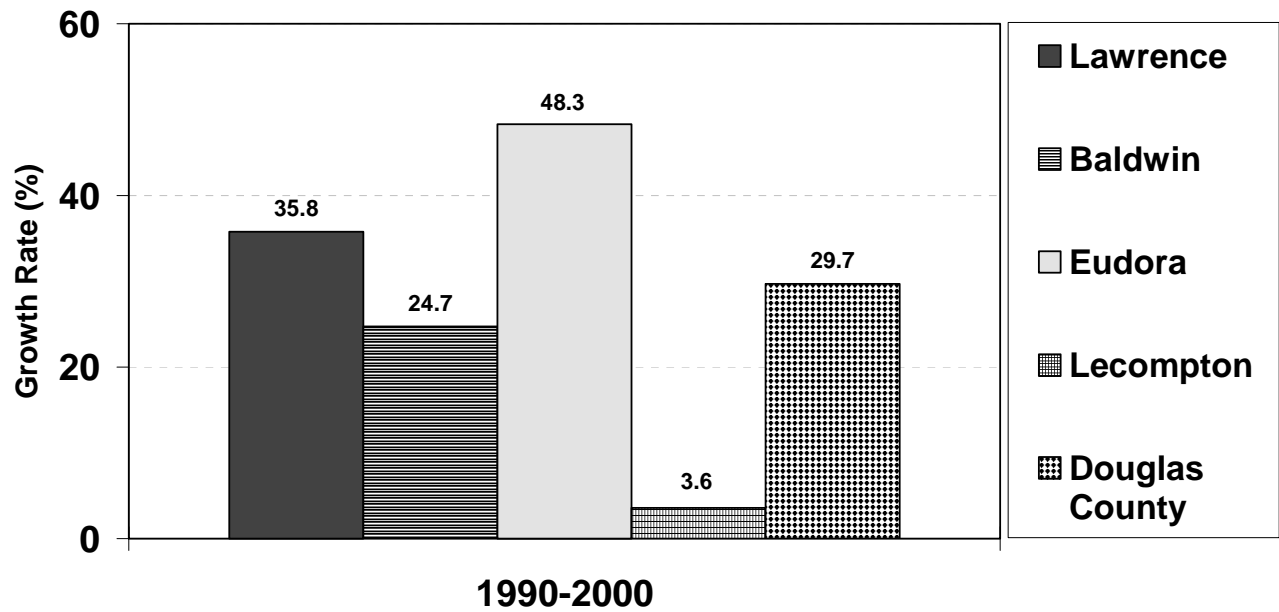


Table 6a
Employment Levels by Industry
Lawrence and Comparative Cities
2000

<u>Industry</u>	<u>Lawrence</u>	<u>Baldwin</u>	<u>Eudora</u>	<u>Lecompton</u>
Ag., Forestry, Mining	195	5	27	1
Construction	2,252	127	243	40
Manufacturing	3,558	238	344	64
Wholesale Trade	712	27	88	2
Retail Trade	5,546	164	208	28
Transportation	1,185	62	118	16
Information	2,095	77	109	14
Finance, Insur., Real Est.	2,687	59	135	2
Professional	3,776	71	196	11
Educational	13,539	681	430	60
Arts & Entertainment	5,430	131	105	24
Other Services	2,021	65	53	14
Public Administration	1,709	78	81	14
Total Employment	44,705	1,785	2,137	290

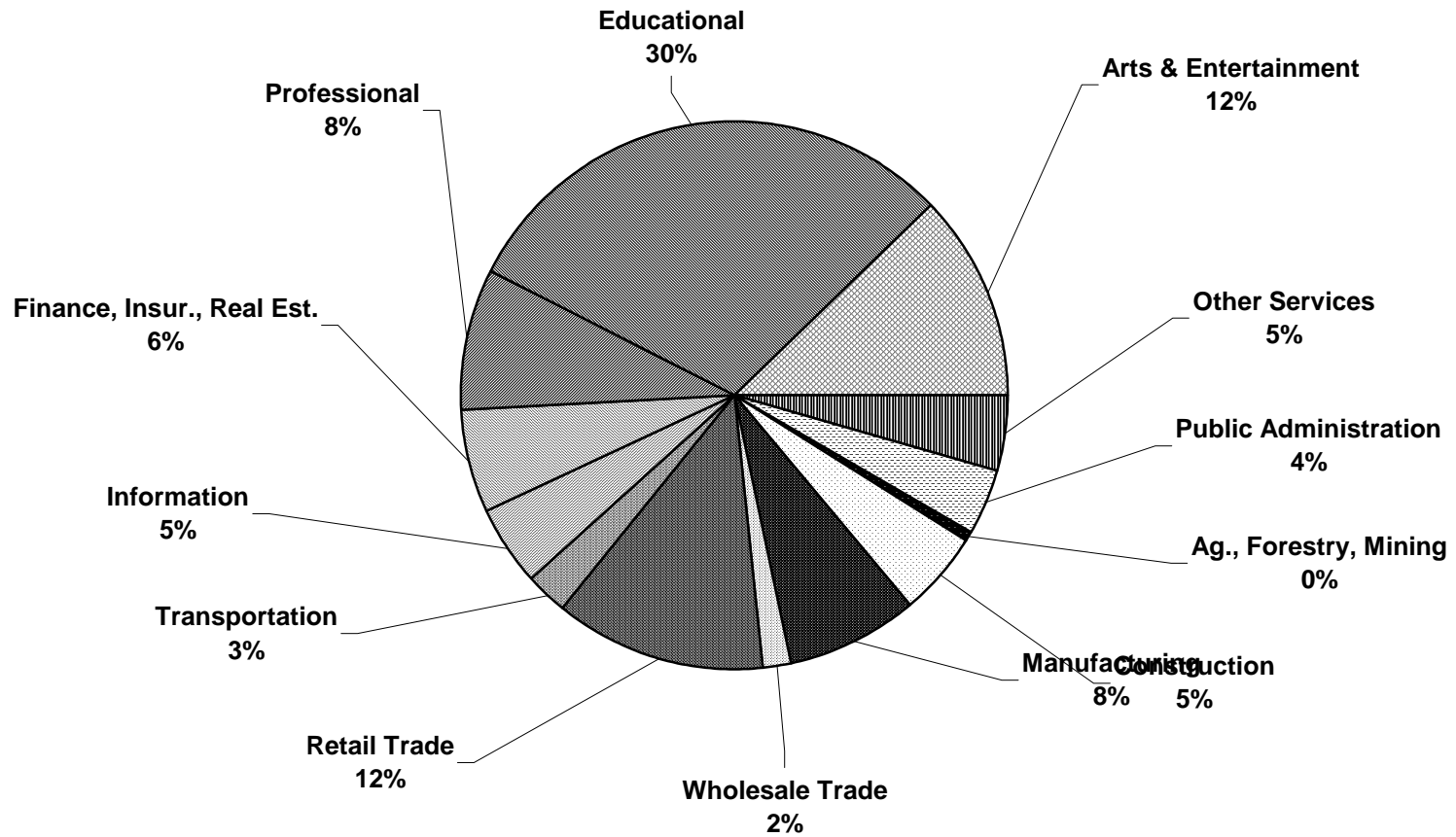
Source: U.S. Bureau of the Census

Table 6b
Employment Shares by Industry
Lawrence and Comparative Cities
2000

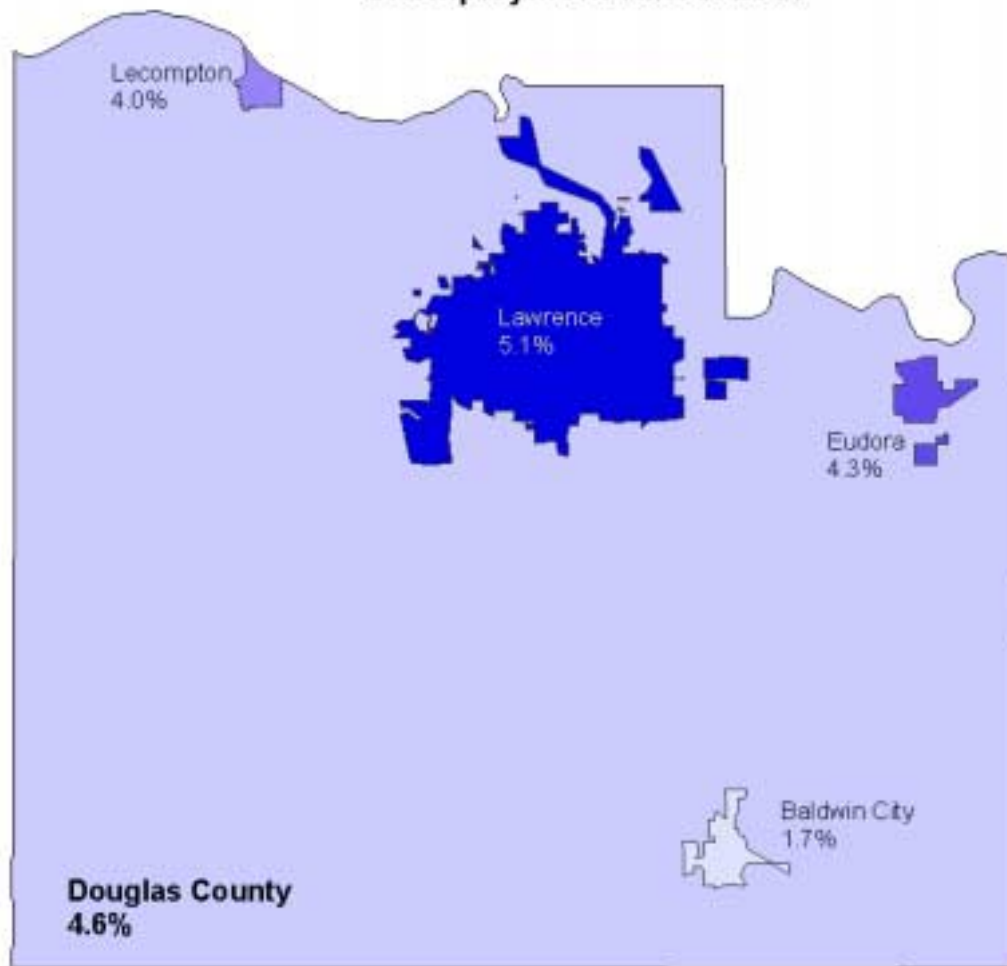
<u>Industry</u>	<u>Lawrence</u>	<u>Baldwin</u>	<u>Eudora</u>	<u>Lecompton</u>
Ag., Forestry, Mining	0.4 %	0.3 %	1.3 %	0.3 %
Construction	5.0	7.1	11.4	13.8
Manufacturing	8.0	13.3	16.1	22.1
Wholesale Trade	1.6	1.5	4.1	0.7
Retail Trade	12.4	9.2	9.7	9.7
Transportation	2.7	3.5	5.5	5.5
Information	4.7	4.3	5.1	4.8
Finance, Insur., Real Est.	6.0	3.3	6.3	0.7
Professional	8.4	4.0	9.2	3.8
Educational	30.3	38.2	20.1	20.7
Arts & Entertainment	12.1	7.3	4.9	8.3
Other Services	4.5	3.6	2.5	4.8
Public Administration	3.8	4.4	3.8	4.8
Total Share	100	100	100	100

Source: U.S. Bureau of the Census

Figure 4
Employment Percent Share by Industry
Lawrence
2000



Map 3
Unemployment Rates: 2000



Source: Policy Research Institute, The University of Kansas; data from the U.S. Census Bureau.

Income

The economic base of the community is determined by the income of the community's residents. Higher average wages may indicate a greater number of jobs in high growth, high performance businesses. Low wage growth may indicate a higher concentration of stable or declining industries.

This report looks at per capita personal income. Per capita personal income indicates the relative wealth of the area compared to the state. As the productivity of business and industry increases, per capita personal income also rises.

Income: Key Findings

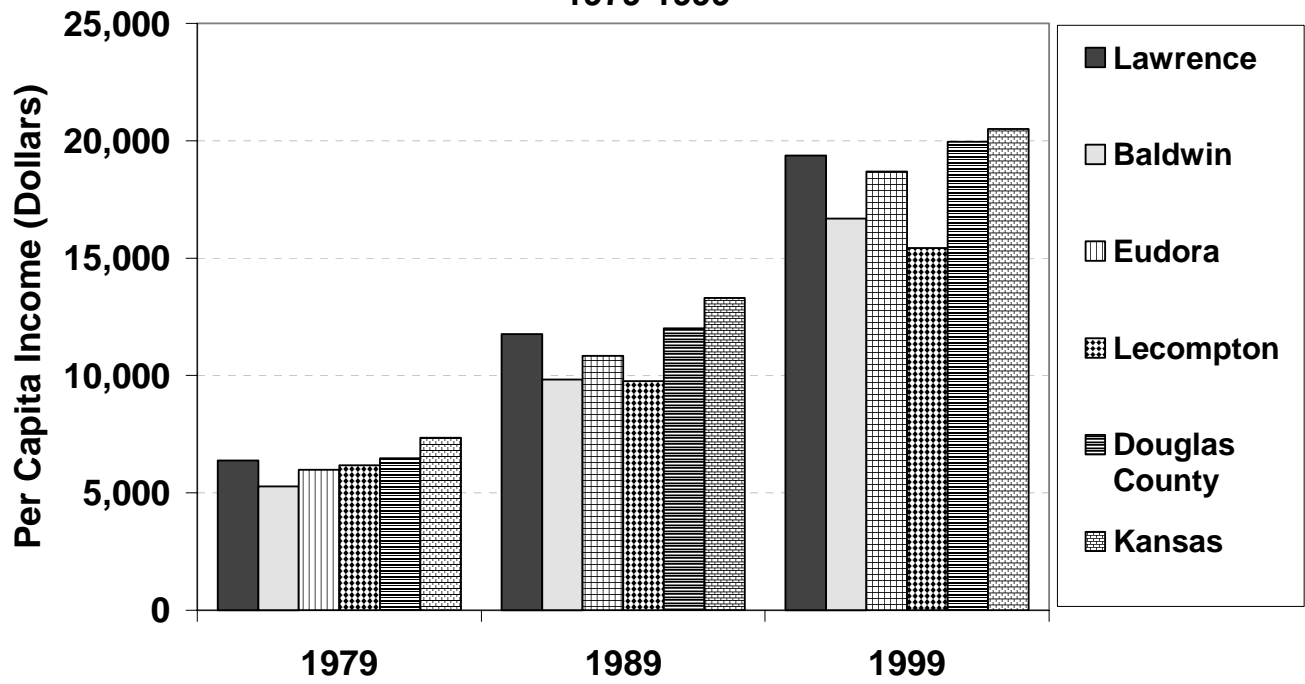
- Per capita personal income in Lawrence in 1999 stood at \$19,378, an amount only \$1,128 less than the average across the state. Of the comparative cities it stood as the highest, but this is only to be expected given the wider employment opportunities in Lawrence than the rural areas of the county. Compared to other metropolitan areas within the state the average in Lawrence is actually somewhat low, this is traditionally ascribed to the high number of students and otherwise part-time workers who draw low wages. (Table 7, Figure 5, and Map 4)

**Table 7
Per Capita Income
Lawrence, Comparative Cities and County, Kansas
1979-1999**

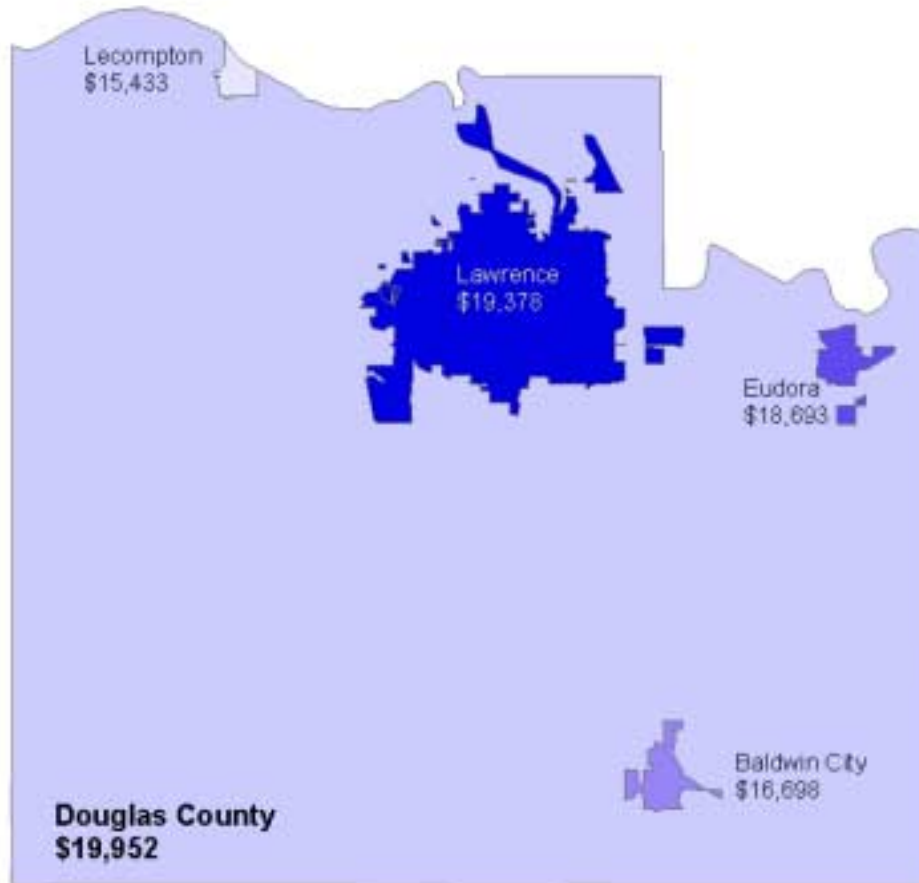
	Per Capita Income			% Growth		
	<u>1979</u>	<u>1989</u>	<u>1999</u>	<u>79-89</u>	<u>89-99</u>	<u>79-99</u>
Lawrence	6,384	11,760	19,378	84.2	64.8	203.5 %
Baldwin	5,277	9,823	16,698	86.1	70.0	216.4
Eudora	5,982	10,825	18,693	81.0	72.7	212.5
Lecompton	6,172	9,758	15,433	58.1	58.2	150.0
Douglas County	6,473	12,003	19,952	85.4	66.2	208.2
Kansas	7,350	13,300	20,506	81.0	54.2	179.0

Source: U.S. Bureau of the Census

Figure 5
Per Capita Income
Lawrence, Comparative Cities and County, Kansas
1979-1999



Map 4
Per Capita Income: 1999



Source: Policy Research Institute, The University of Kansas; data from the U.S. Census Bureau.

TAXES

Of all the taxes residents pay, the one that varies most from city to city is the property tax. City, county, school districts and occasionally other governmental units use the mill levy (tax per \$1,000) on locally owned property to raise money. Although many residents view high property taxes in a negative light, taxes are necessary to provide services which those residents use. Therefore, high taxes may be a positive situation if they are used wisely to provide for the community in ways which local members deem important and relevant. When comparing the tax structure of one city to another, it is important to keep in mind differences in the level of services between those places.

Furthermore it is also important to think about property *values*. In a city where property taxes are high, but property values are low, simply looking at the mill levy may not give a complete picture. Residents can be content to live with high property taxes if their properties were purchased at relatively low prices. Conversely, low property taxes will not necessarily attract home-buyers if the price of those homes is unaffordably high.

Taxes: Key Findings

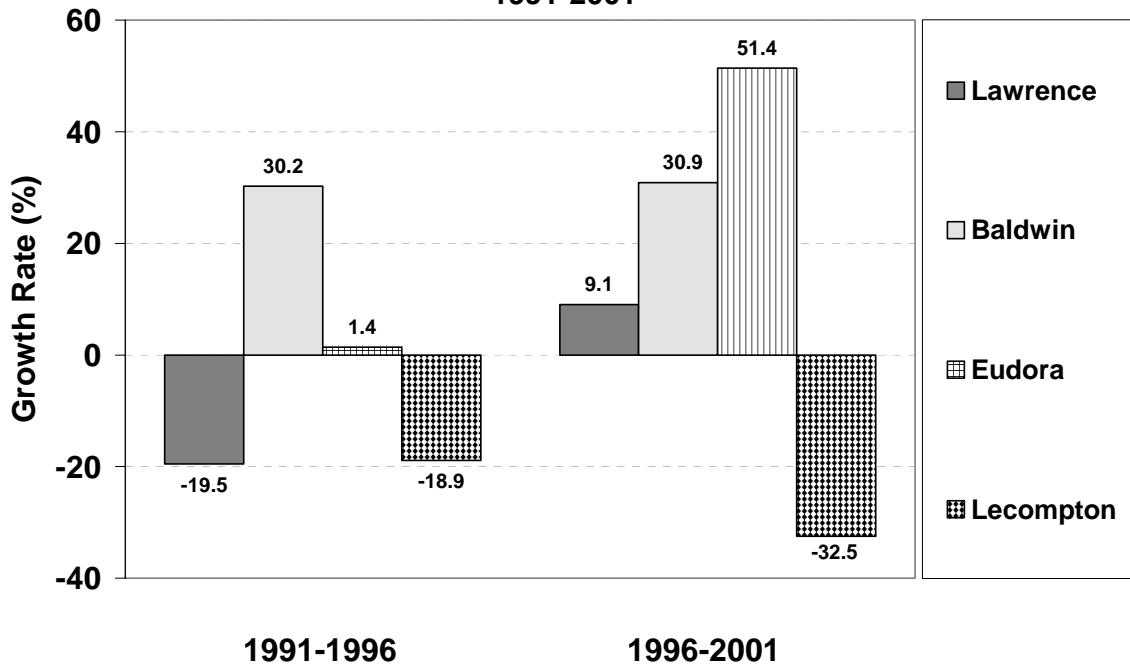
- In 2001 the total property tax levied by the city of Lawrence was 224.73 mills. This was down about 12 percent from ten years previous, but was still somewhat higher than levies in Eudora and Lecompton. Nevertheless, over time Lawrence has increasingly turned to the sales tax to fund city services, although property taxes still account for the majority of revenues. (Table 8 and Figure 6)
- The assessed valuation in a city is the dollar value of all property within the city limits. Over time, the assessed valuation increases as new structures are built, or more land is annexed to the city, or as property values rise. In all cases examined here, total assessed valuations followed population rankings. That is, the more people who reside in a city, the higher the assessed valuation, therefore Lawrence had the highest and Lecompton the smallest. In Lawrence the assessed valuation grew at an average annual rate of about 13 percent from 1992 to 2002. (Table 9 and Figure 7)
- Lawrence as well as Eudora and Baldwin have a sales tax, Lecompton does not at present. Eudora's is the lowest rate at 0.5 percent, both Lawrence and Baldwin's have theirs at the limit set by state laws: 1.0 percent.
- Lawrence's trade pull factor in 2001 was 1.18. A trade pull factor of more than one means the city 'pulled in' more retail activity from other areas than leaked out. Of the comparative cities, only Lawrence had a trade pull factor above one. (Map 5)

**Table 8
City Mill Levies
Lawrence and Comparative Cities
1991-2001**

	Total Mill Levies			% Growth		
	1991	1996	2001	91-96	96-01	91-01
Lawrence	28.17	22.67	24.73	-19.5	9.1	-12.2 %
Baldwin	24.44	31.83	41.66	30.2	30.9	70.4
Eudora	11.91	12.08	18.29	1.4	51.4	53.5
Lecompton	22.45	18.21	12.30	-18.9	-32.5	-45.2

Source: Douglas County Budget, FY 2002

**Figure 6
City Mill Levy Growth Rates
Lawrence and Comparative Cities
1991-2001**

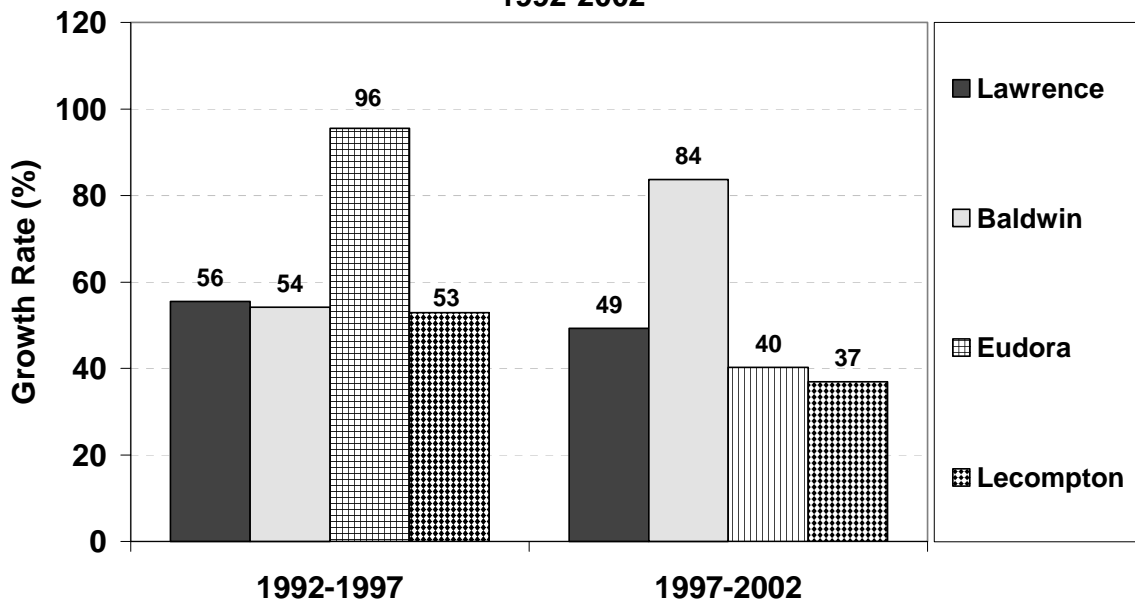


**Table 9
Assessed Tangible Valuation
Lawrence and Comparative Cities
1992-2002**

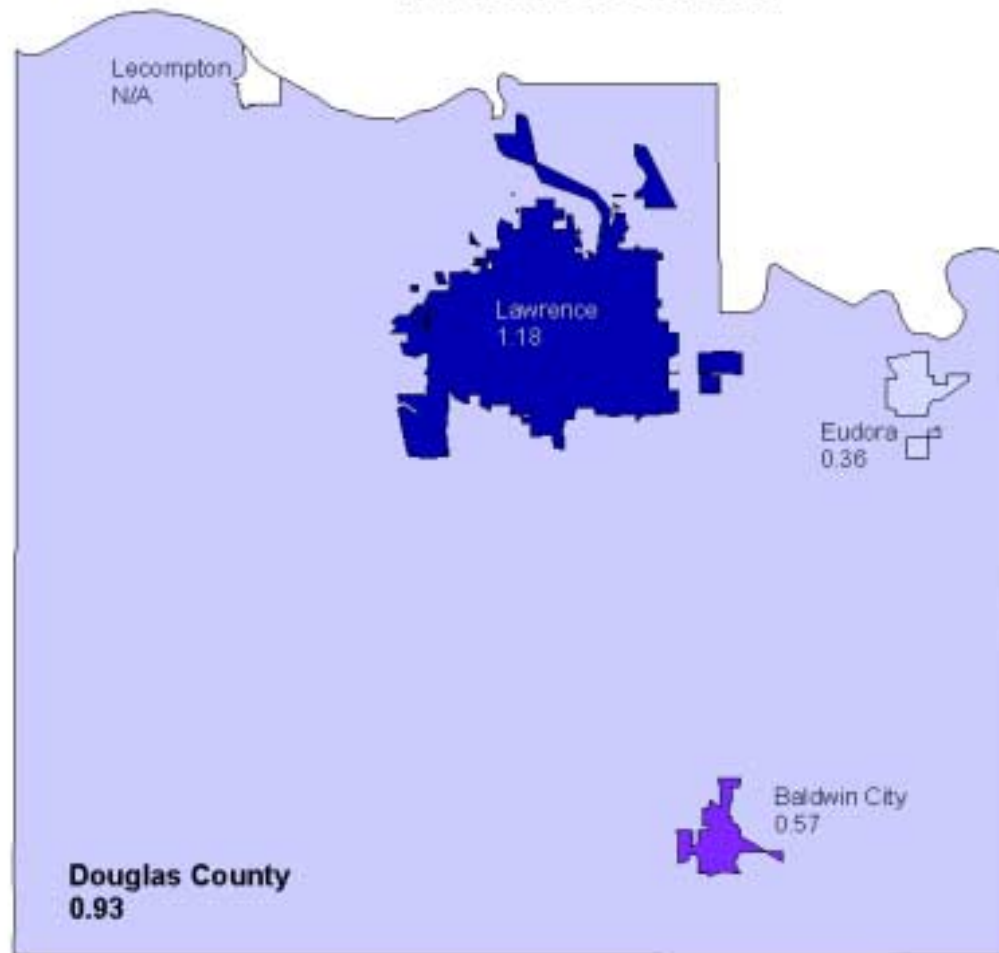
	Assessed Tangible Valuation (in thousands of dollars)			% Growth		
	<u>1992</u>	<u>1997</u>	<u>2002</u>	<u>92-97</u>	<u>97-02</u>	<u>92-02</u>
Lawrence	271,615	422,416	630,439	55.5	49.2	132.1 %
Baldwin	7,069	10,896	20,019	54.1	83.7	183.2
Eudora	9,201	17,991	25,231	95.5	40.2	174.2
Lecompton	1,213	1,855	2,540	52.9	36.9	109.3

Source: Douglas County Appraiser's Office

**Figure 7
Assessed Valuation Growth Rates
Lawrence and Comparative Cities
1992-2002**



Map 5 Trade Pull Factors: 2001



Note: County Trade Pull Factor (CTPF) = County per capita sales tax collections divided by Kansas per capita sales tax collections.
Population data used to compute per capita sales includes institutionalized population.
Source: David Darling, K-State Extension and Research, Department of Agricultural Economics. Revised September 2002.

EDUCATION

The educational level of residents is likely to influence the well-being of the whole community. Communities able to provide a higher-skilled workforce are more likely to benefit from new developing industries. Residents who have a good educational background will be more employable and able to command higher salaries. Employers will benefit as well because they will most likely experience lower turnover and training costs. On the other hand, individuals with lower education levels have a harder time finding jobs that can supply a living wage and may be more likely to use social services.

Education: Key Findings

- The percentage of Lawrence residents over the age of 25 who had achieved less than a high-school diploma was 7.2 percent in 2000, half the statewide percentage of 14. Furthermore, the percentage in Lawrence decreased considerably from 1990 when it stood at 9.1 percent. (Table 10)
- The number of people in Lawrence who had completed college, whether through an associate's, bachelor's, or graduate program, all increased from 1990 to 2000, and consequently the number of those who had only completed through high-school fell. Overall, the number of Lawrence residents who held at least one college degree in 2000 was nearly 53 percent, making it one of the highest educated cities in the entire nation (the sixth highest, in fact). The presence of the University of Kansas no doubt makes a favorable difference. (Table 10)
- The Lawrence school district graduated roughly 625 high school students on average each year from 1993 to 2002. The number of high school dropouts each of those years fluctuated from a low of only 63 to a high of 152, with the average of 112. (Table 11)
- High school dropouts as a percent of graduates in Lawrence averaged about 18.9 percent a year from 1993 to 2002, somewhat lower than the average rate for Kansas during the same period, about 20 percent. However, whereas the state rate remained fairly constant throughout the decade, in Lawrence the rate seems to be steadily decreasing: it's highest level was in 1995, and has dropped nearly every year since. (Table 11)

Table 10
Educational Attainment of Persons over 25
As a Percentage of the Population of Persons over 25
Lawrence and Kansas
1990-2000

	<u>Year</u>	<u>Completed Less Than 9th Grade</u>	<u>9-12th Grade No Diploma</u>	<u>High School Diploma</u>	<u>Some College</u>	<u>Associate Degree</u>	<u>Bachelor's Degree</u>	<u>Graduate Degree</u>	<u>Pop. Over 25</u>
Lawrence	1990	995	1,939	6,927	6,942	1,317	7,965	6,271	32,356
	2000	855	2,075	7,520	8,926	1,951	10,958	8,459	40,658
Kansas	1990	120,951	172,321	514,177	342,964	85,146	221,016	109,361	1,561,417
	2000	88,124	149,675	507,612	417,722	99,096	290,271	148,707	1,699,833

As a Percent of Population of Persons over 25:

Lawrence	1990	3.1 %	6.0 %	21.4 %	21.5 %	4.1 %	24.6 %	19.4 %
	2000	2.1	5.1	18.5	22.0	4.8	27.0	20.8
Kansas	1990	7.7	11.0	32.9	22.0	5.5	14.2	7.0
	2000	5.2	8.8	29.9	24.6	5.8	17.1	8.7

Source: U.S. Bureau of the Census

Table 11
High School Graduates and Drop-Outs
Lawrence and Kansas
1993-2002

	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>
Lawrence										
Grads	521	549	532	532	620	563	681	743	741	772
Drops	101	151	152	134	142	123	115	68	71	63
Kansas										
Grads	26,019	26,481	27,769	26,997	27,931	29,331	30,015	30,592	30,883	30,224
Drops	5,753	6,505	6,680	6,432	6,541	6,156	5,810	4,836	4,687	4,607
 <i>High school drop-outs as percent of graduates</i>										
Lawrence	19.4%	27.5%	28.6%	25.2%	22.9%	21.8%	16.9%	9.2%	9.6%	8.2%
Kansas	22.1%	24.6%	24.1%	23.8%	23.4%	21.0%	19.4%	15.8%	15.2%	15.2%

Grads: High school graduates, year ending:

Drops: High school dropouts, year ending:

Source: Kansas State Department of Education

CONCLUSION

Economic data is an important tool of the community economic development process, because it gives community members a better view of the current facts and trends in different areas of performance for the community. However, numbers alone are not enough. The data must be analyzed and interpreted, taking into account the intuition of those within the community as to what the trends really mean.

Unsurprisingly for a city with a vibrant university located at the crossroads of two major metropolitan areas, Lawrence has experienced rapid population growth for as long as anyone can remember. The over-25 population in Lawrence is highly educated, even compared to the rest of the nation. Increasingly the new in-migrant is an upper middle-aged professional, many of whom commute to work outside of the city. This trend has allowed employment growth in the last decade to significantly outpace population growth, since for many residents employment prospects extend far beyond city limits.

Lawrence is a rapidly growing community, diverse, and founded on the stable economic base of a successful university system. Its amenities, location, and other quality of life strengths make it an undeniably attractive place to live.