



# MARKET VIEW

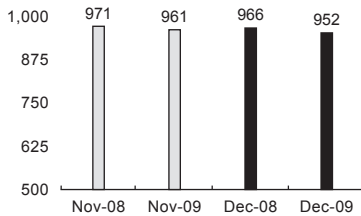
Volume 1, Issue 1

KANSAS CITY

April 2010

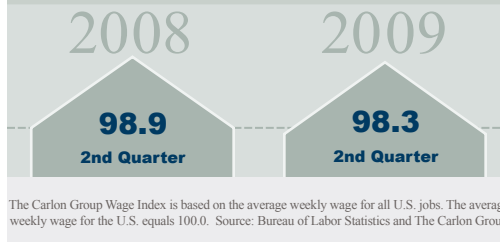
## Kansas City Employment

Total Jobs in Thousands (000s) - NSA



Source: Bureau of Labor Statistics  
NSA = not seasonally adjusted

## The Carlon Group Kansas City WAGE INDEX



## Kansas City Employment

National Unemployment Avg. 9.7% in February 2010 - NSA

Employment Change\* Unemployment Rate

October-08	-195	6.0%
October-09	+218	8.4%
November-08	-3,400	6.2%
November-09	-909	8.4%
December-08	-5,633	6.5%
December-09	-9,325	8.6%

Source: Bureau of Labor Statistics  
NSA = not seasonally adjusted  
\*Change from prior month

## Kansas City Industry Profile

### Kansas City Management Occupations

Occupation	No. of Employees	Hourly Mean Wage	Annual Mean Wage
Chief executives	3,710	\$74.29	\$154,530
General and operations managers	13,630	\$46.75	\$97,240
Sales managers	2,260	\$51.68	\$107,490
Computer and I/S managers	3,140	\$50.69	\$105,440

Source: Bureau of Labor Statistics May 2008 Most recent data available

## Kansas City Market Snapshot

### Private Sector Jobs

Total Kansas City Employment

2003	816,200
2004	823,700
2005	834,900
2006	848,300
2007	862,800
2008	865,500
2009	839,800

Source: Bureau of Labor Statistics

### Government Jobs

Total Kansas City Employment

2003	142,500
2004	143,700
2005	144,100
2006	145,800
2007	150,500
2008	153,000
2009	153,700

Source: Bureau of Labor Statistics

### Kansas City Real Estate Average Home Prices

October-08	\$159,711
October-09	\$158,074
November-08	\$155,195
November-09	\$160,621
December-08	\$152,687
December-09	\$152,858
U.S. Median	\$178,300

Source: Kansas City Regional Association of REALTORS®

### Consumer Expenditures Kansas City Avg. Expenditures

Annual expenditures	\$46,308
Food	\$6,092
Housing	\$15,129
Utilities	\$3,419
Transportation	\$8,518
Health care	\$2,813
Entertainment	\$2,095

Source: Bureau of Labor Statistics 2004/05 Survey  
Most recent data available

**CBIZ & MHM**, together one of the Top Ten accounting providers in the nation, serving Kansas City since 1954

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\*Audit and attest services provided by Mayer Hoffman McCann P.C., an independent CPA firm.

## Kansas City By The Numbers

Unemployment 8.6% ▲ Labor Force 1,041,855 ▲ Average Weekly Wage \$826 ▼ Annual Per Capita Personal Income \$39,222\* ▲

Source: Bureau of Labor Statistics and Bureau of Economic Analysis ▲/▼ = Change from prior period \*Most recent data available



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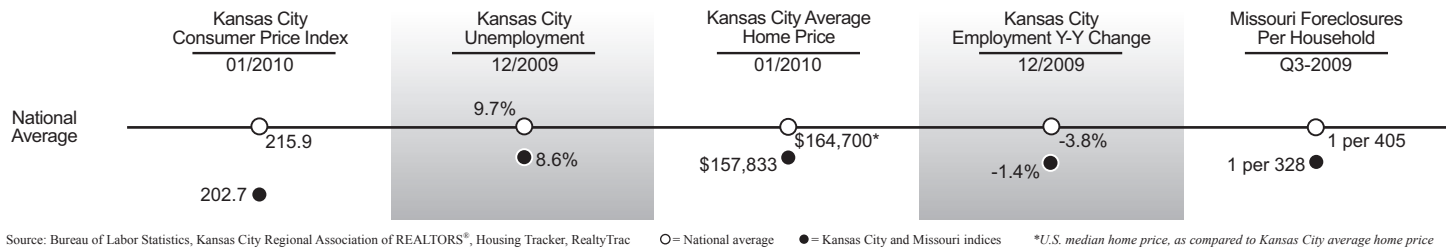


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# Economic Trends



## Small Business Optimism Index

Based on a Survey of Small and Independent Business Owners - Seasonally Adjusted (1986 = 100.0)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2006</b>	101.1	101.5	98.0	100.1	98.5	96.7	98.1	95.9	99.4	100.7	99.7	96.5
<b>2007</b>	98.9	98.2	97.3	96.8	97.2	96.0	97.6	96.3	97.3	96.2	94.4	94.6
<b>2008</b>	91.8	92.9	89.6	91.5	89.3	89.2	88.2	91.1	92.9	87.5	87.8	85.2
<b>2009</b>	84.1	82.6	81.0	86.8	88.9	87.8	86.5	88.6	88.8	89.1	88.3	88.0
<b>2010</b>	89.3											

Source: National Federation of Independent Business

**CBIZ**, one of the **Top Ten Benefits Specialists** in the U.S., serving Kansas City since 1962

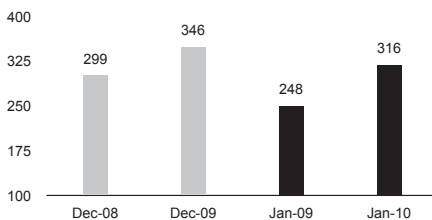
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## National Indicators

### U.S. Automotive Unit Sales

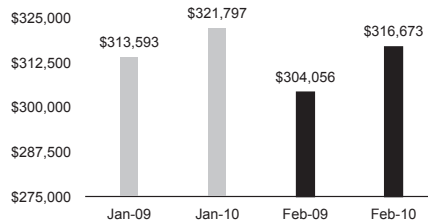
Seasonally Adjusted in Thousands (000s)



Source: U.S. Department of Commerce

### Total U.S. Retail Sales

In Millions (000,000s) NSA



Source: U.S. Department of Commerce    NSA = not seasonally adjusted

### Single Most Important Problem Facing Small Businesses

Problem	January 2010	January 2009
Taxes	22%	19%
Inflation	3%	6%
Poor sales	31%	28%
Finance and business rates	5%	4%
Cost of labor	4%	5%
Government regs. and red tape	13%	11%
Competition from large business	7%	6%
Quality of labor	3%	6%
Cost/availability of insurance	8%	9%
Other	4%	6%

Source: National Federation of Independent Business

### United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook
Q1-2010	12%	12%	73%	3%	0%
Q4-2009	12%	14%	69%	5%	-2%
Q3-2009	15%	13%	67%	5%	2%
Q2-2009	15%	14%	67%	4%	1%
Q1-2009	16%	13%	67%	5%	3%

Source: Manpower Survey Q1-2010  
Data is based on interviews with 16,000 employers, who were asked how the current employment situation will change in the next three months

### Gross Domestic Product

% change from prior quarter

<b>Q4-08</b>	<b>-5.4%</b>
<b>Q1-09</b>	<b>-6.4%</b>
<b>Q2-09</b>	<b>-0.7%</b>
<b>Q3-09</b>	<b>2.2%</b>
<b>Q4-09</b>	<b>5.9%</b>

Source: Bureau of Economic Analysis

### Consumer Confidence Index

1985 = 100

<b>Oct-09</b>	<b>48.7</b>
<b>Nov-09</b>	<b>50.6</b>
<b>Dec-09</b>	<b>53.6</b>
<b>Jan-10</b>	<b>56.5</b>
<b>Feb-10 (p)</b>	<b>46.0</b>

Source: The Conference Board  
(p) = preliminary

### Capital Expenditure Plans

Small Businesses Planning a Capital Expenditure in Three to Six Months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>2005</b>	34%	33%	36%	32%	33%	33%	29%	31%	31%	29%	34%	33%
<b>2006</b>	32%	35%	31%	33%	28%	27%	31%	28%	30%	31%	31%	26%
<b>2007</b>	30%	30%	33%	29%	29%	28%	27%	27%	29%	27%	27%	30%
<b>2008</b>	25%	26%	25%	26%	25%	26%	21%	23%	21%	19%	21%	17%
<b>2009</b>	19%	18%	16%	19%	20%	17%	18%	16%	18%	17%	16%	18%
<b>2010</b>	20%											

Source: National Federation of Independent Business