



ECONOMIC DEVELOPMENT

OCTOBER 7, 2014

<https://kcstat.kcmo.org>

INVEST IN THE UNDERDEVELOPED PARTS OF THE CITY

Invest in Under-developed Areas

243

Land Bank properties sold or under contract



measuring



Detail >

KEY METRICS: SALES OF LAND BANK PROPERTIES

Invest in the underdeveloped parts of the City by effectively harnessing opportunities to improve housing and commercial development.

The key measurement for this priority is the number of properties sold or under contract through the Kansas City Land Bank, which is a new entity established in 2013 to assist in managing and reusing vacant properties. Since this is a new process, no target has been set for this measure. [Explore the data >](#)

243 Land Bank properties sold or under contract
Current as of Sep 2014



LAND BANK

LAND BANK PROPERTIES SOLD OR UNDER CONTRACT

Land Bank Properties Sold

158
units

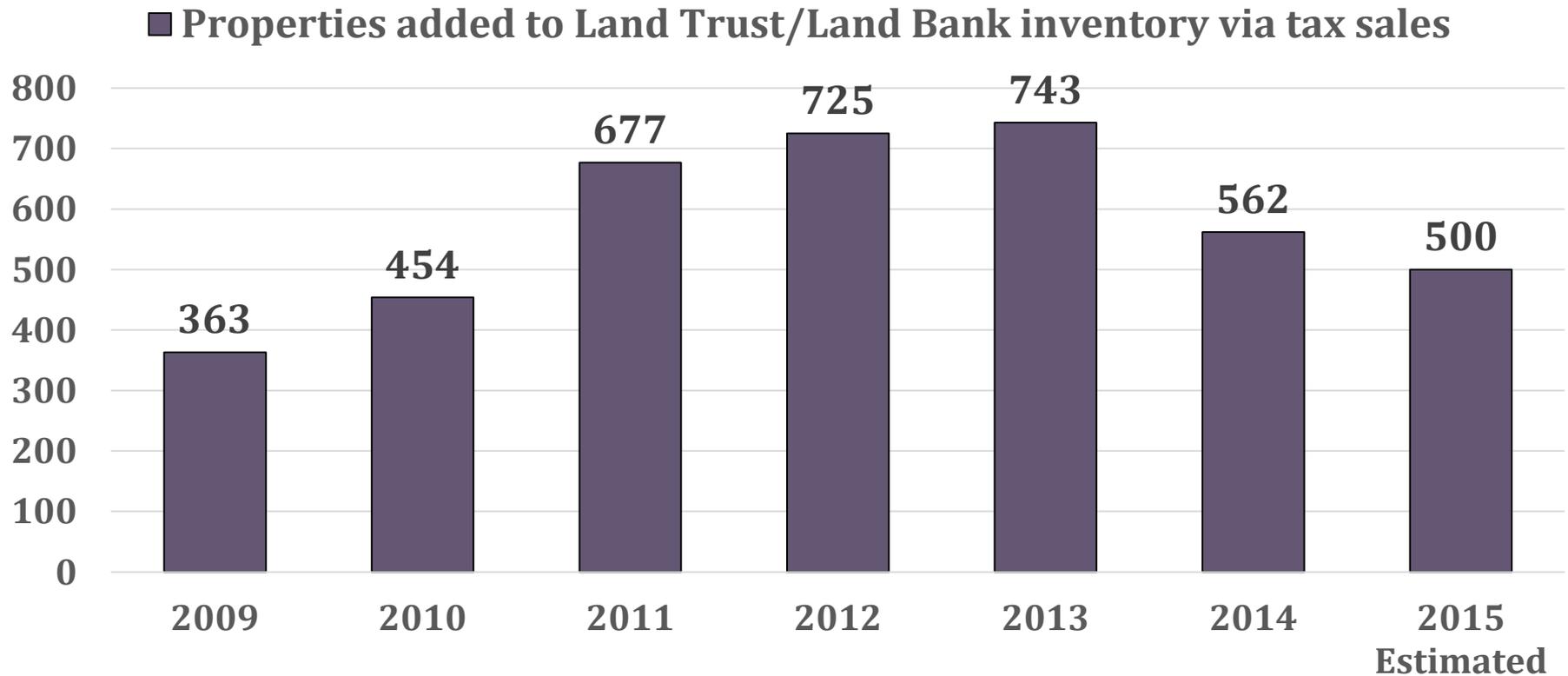
This is the total number of properties for which the Land Bank has completed a sale and transfer of ownership to a new property owner.

Land Bank Properties Under Contract, Ready to be Sold

85
units

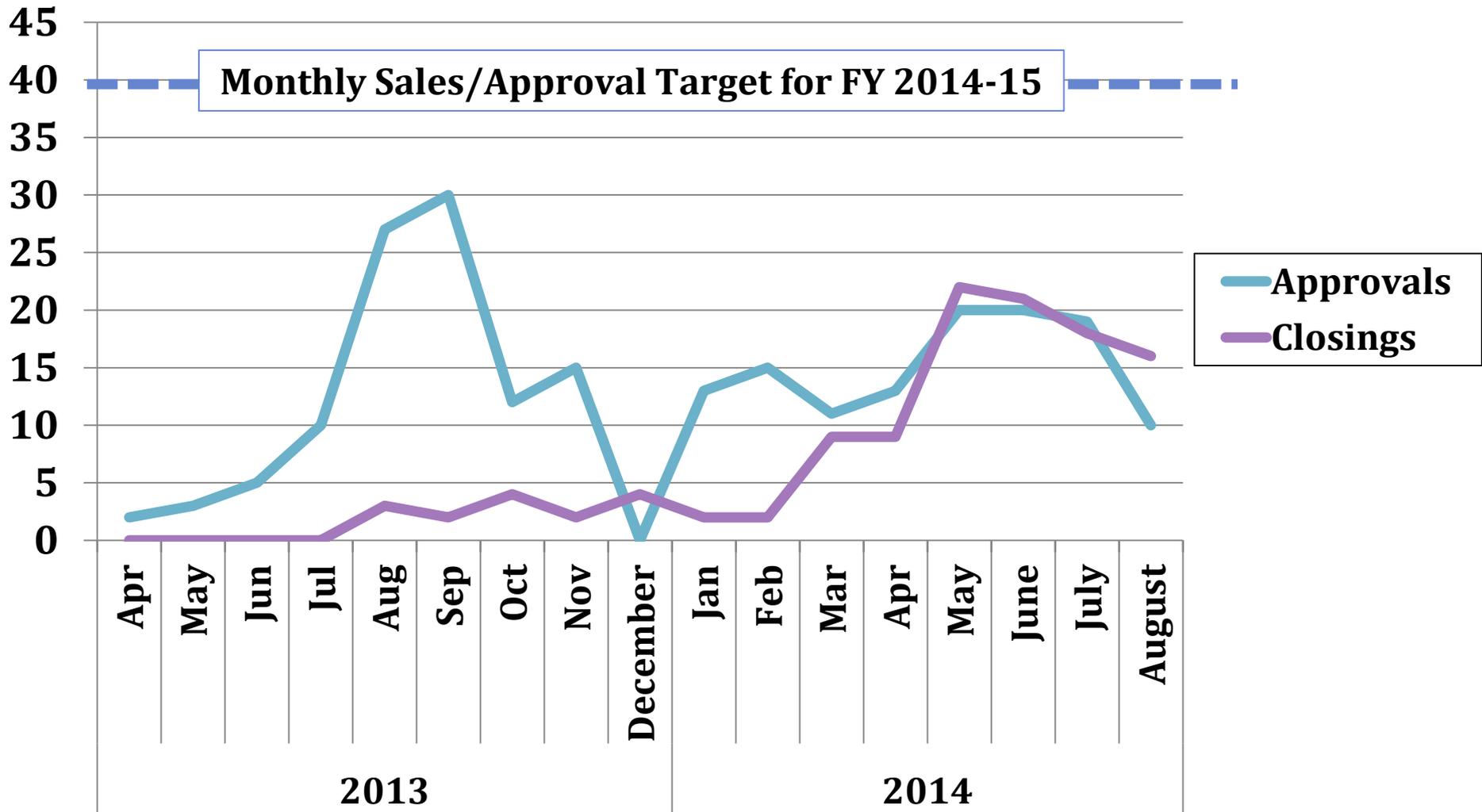
This is the total number of properties for which the Land Bank Commission has accepted an offer from a buyer, but the sale is still pending due to the significant amount of legal paperwork needed to complete the sale.

LAND BANK HISTORIC VOLUME

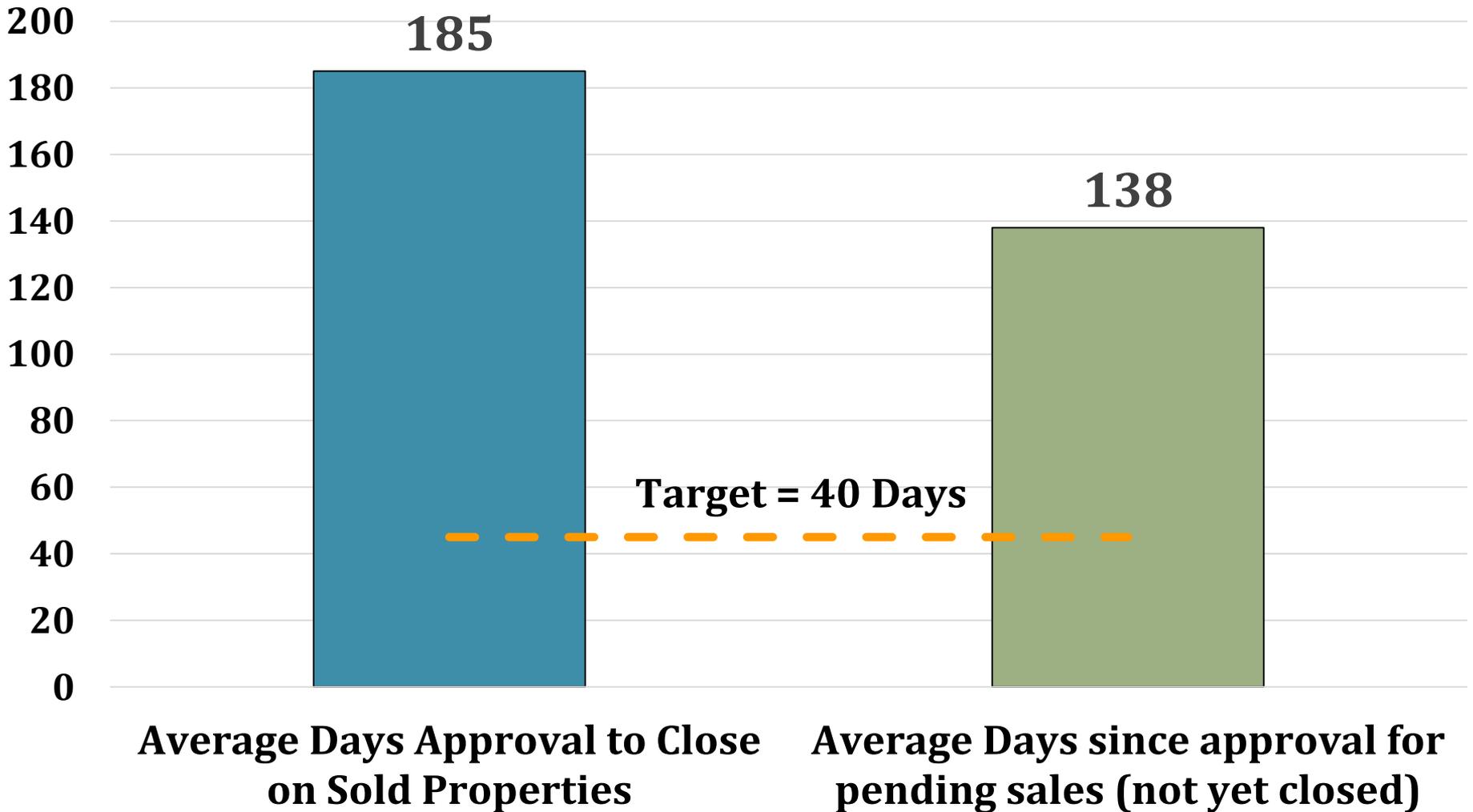


Land Bank goal of considering 40 properties per month is tied to ability to manage overall inventory based on historic influx of properties each year

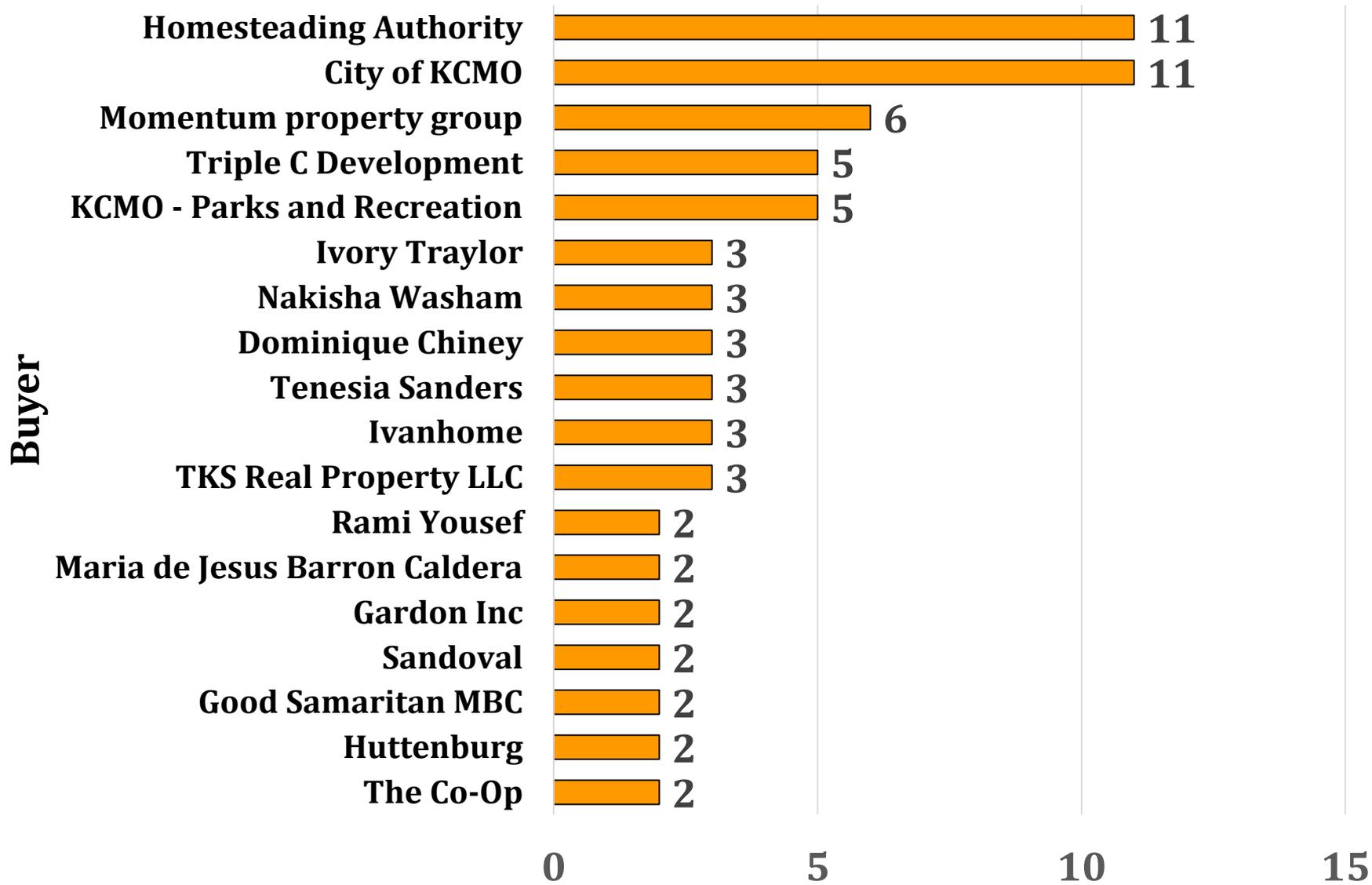
LAND BANK APPROVALS BY MONTH



AVERAGE TIME FROM OFFER TO CLOSE



SALES WITH MULTIPLE PROPERTIES



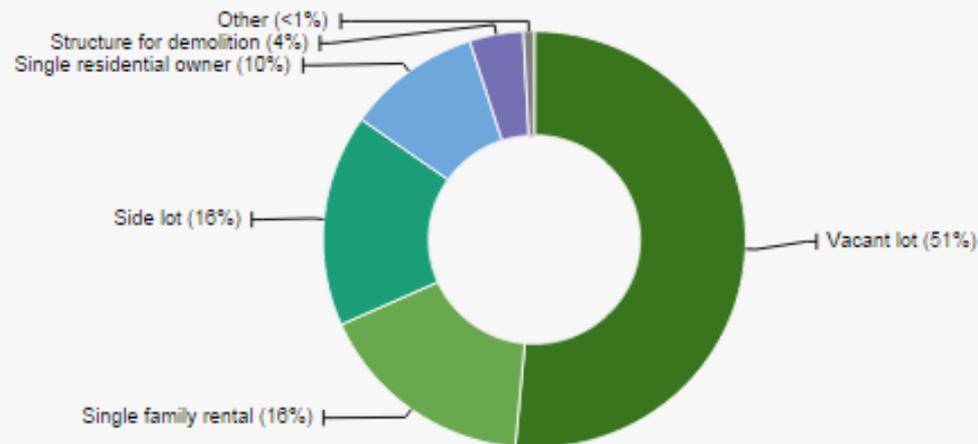
Source: Land Bank

Number of properties per sale

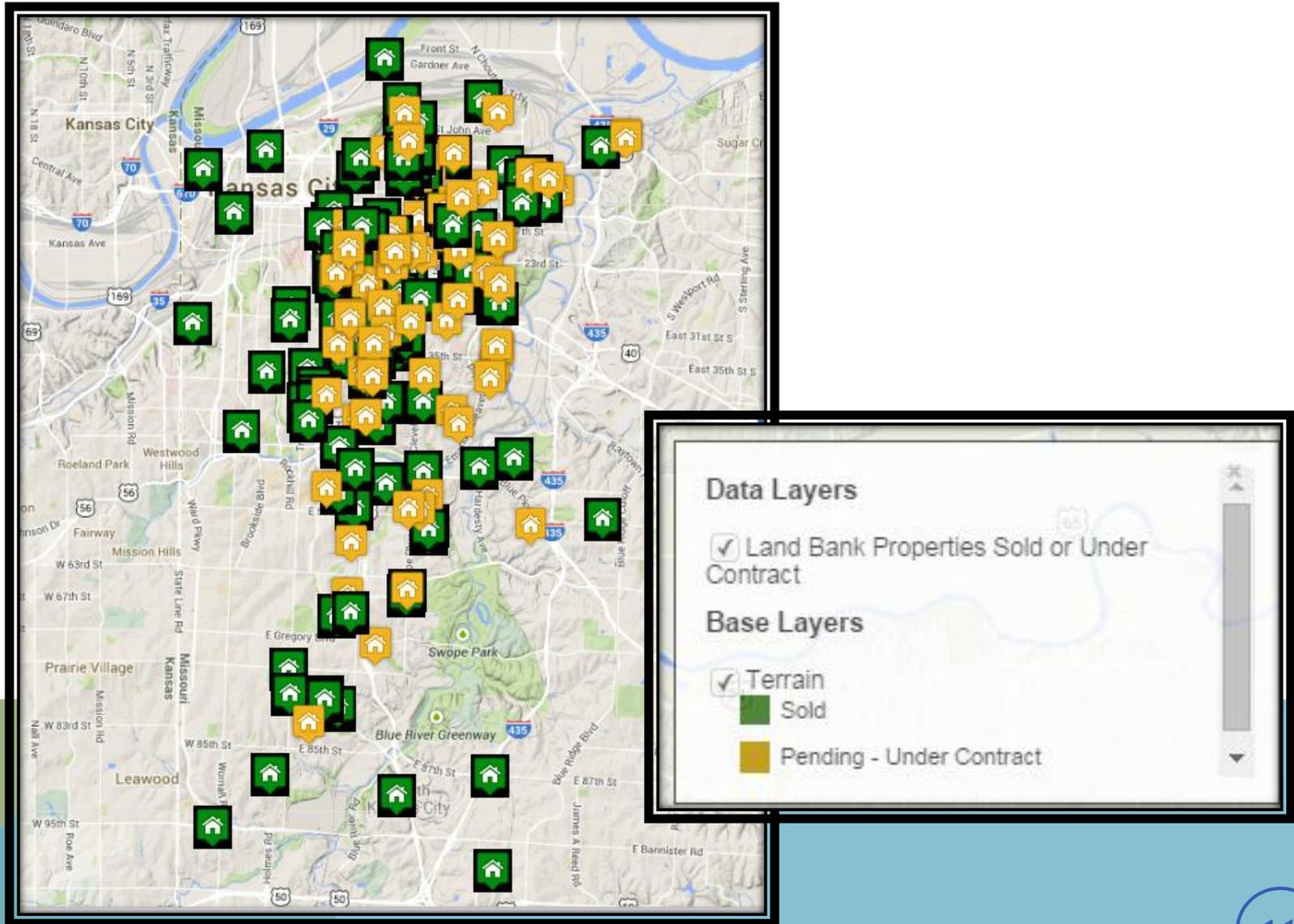
DISPOSITION TYPE OF SALES AND PENDING SALES

Disposition of Land Bank Properties Sold or Pending Sale

Of the Land Bank properties have been sold or are pending sale (with an accepted offer), the majority are vacant lots or side lots (which can be available for neighboring owner-occupants for as little as \$1). However, properties have also been acquired with the goal of renovation for sale, or renovation by owners. *(updated quarterly)*



LOCATION OF SOLD AND PENDING PROPERTIES



Source: kcstat.kcmo.org (Land Bank)

VACANT PROPERTY CONFERENCE IN BALTIMORE

- **Understand the Market and How it works**
 - ❖ Market Survey
 - Classify neighborhoods as Stable/In Transition/Flat
 - ❖ Talk to developers/rehabbers in areas of interest
 - Find out their strategies/future goals for distressed areas
- **Look at outcome, not just output**
- **Engage title companies**
 - ❖ Talk to neighborhoods (not well defined in Baltimore)
 - ❖ Talk to rehabbers (analyze permit data for who has pulled permits)
- **Facilitate Investment in Emerging Markets**
 - ❖ Provide incentives to investors – road improvements, plant trees



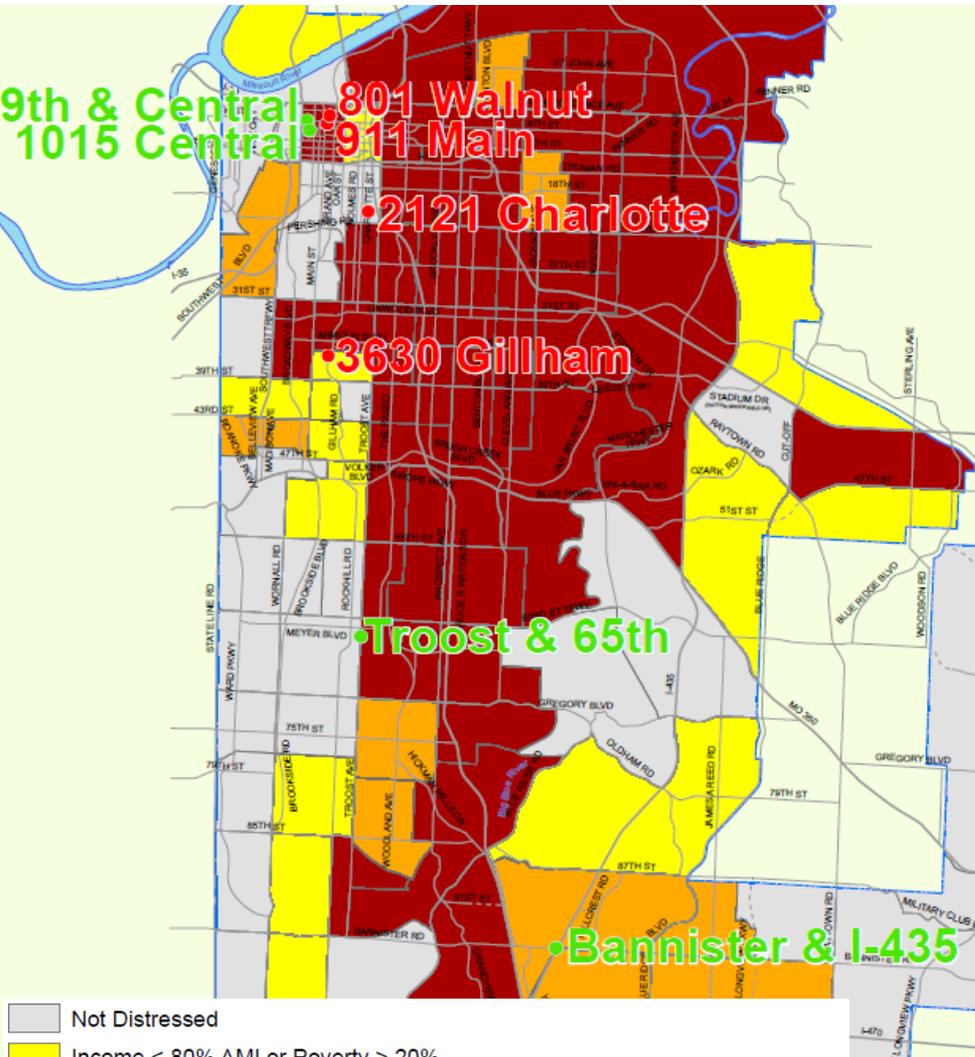
KCMO Team: Ted Anderson and Howard Townsend (KC Land Bank), Holly Dodge and Christa Moss (Law Department) & Tracey Bryant (Neighborhood Preservation Division)

BALTIMORE AND KANSAS CITY COMPARED

	Kansas City	Baltimore
Population	464,310	621,342
Vacant Houses	5,739	16,400
Number of Inspectors	52	86
Land Mass	319 sq mi	92.05 sq mi
# of Attys	2	8

*Baltimore is made mostly of row houses which present unique issues

COMMERCIAL INVESTMENT IN UNDERDEVELOPED AREAS



- Not Distressed
- Income < 80% AMI or Poverty > 20%
- Income < 60% AMI or Poverty > 30% or Unemployment > 1.5 times U.S. Rate
- Income < 50% AMI or Poverty > 40% or Unemployment > 2.0 times U.S. Rate

- **LCRA Project**
- **TIF Project**

Source: EDC/City Manager's Office

Redevelopment Investment FY 2014

Tax Increment Financing	
Cerner	\$ 4,296,391,021
Savoy Hotel	\$ 89,660,711
Crossroads Academy	\$ 6,961,425
Baptist Medical	\$ 5,000,000
	\$ 4,398,013,157

Land Clearance Redevelopment Authority

Commerce Tower	\$ 71,000,000
Gumbel Building	\$ 7,000,000
Gillham Park	\$ 3,488,709
MOB/TMC	\$ 30,000,000
	\$ 111,488,709

Total Redevelopment Investment
\$ 4,509,501,866

27 Land Bank properties have been sold that are classified as commercial or industrial; 270 currently available

INVEST NORTHEAST

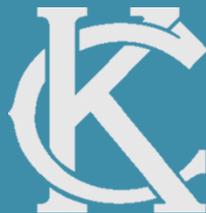
Homeowners

- Property Tax Abatement
- Minor Home Repair Grant

Businesses

- Micro Loans
- Business Training Scholarships

Project Total: \$265,000



PASEO GATEWAY -- CURRENT PLANNING EFFORT

Evaluate and Score 3 Major Concepts

- Safety,
- Functionality,
- Cost
- Potential for Future Redevelopment
- Streetcar Integration

Real Estate Market Analysis

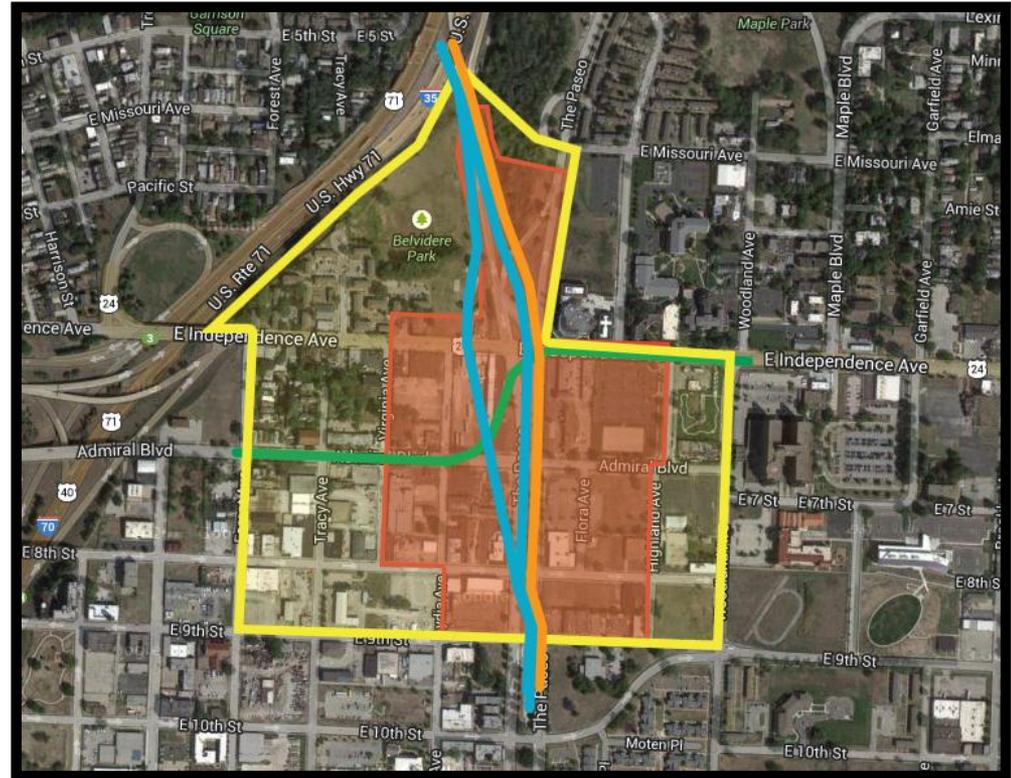
Public Input

Identification of Preferred Alignment and Redevelopment Strategy

Preliminary Surveying/Mapping

Updated Cost Estimates

Secure Funding for ROW Acquisition – STP Grant



Project Total: \$17,690,000



IMPLEMENTATION OF ADVANCEKC STRATEGIES

IMPLEMENT ADVANCEKC

Implement the
AdvanceKC Plan

404,618
Total jobs

 measuring 

Detail 

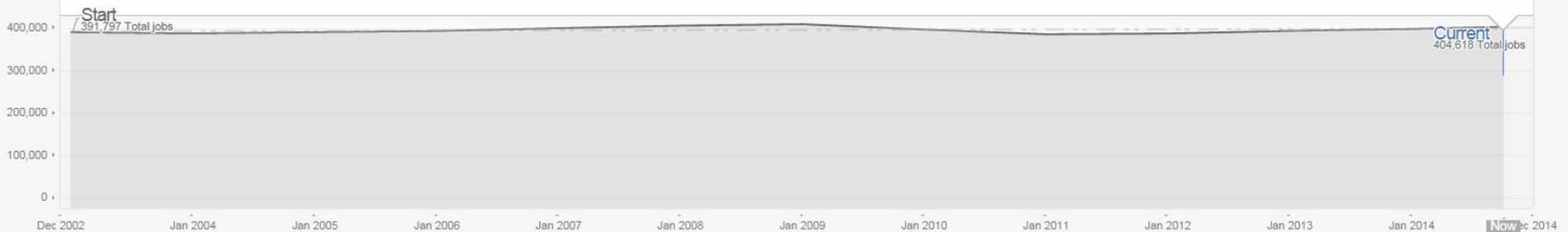
KEY METRICS: JOBS

Economic Development

Grow the economy and population of Kansas City by implementing AdvanceKC, the city's strategic plan for economic development.

The key measurement for this priority is Kansas City's total employment, since growth in the number of total jobs signifies increased economic opportunity for residents and businesses alike. Kansas City's employment has remained relatively stable over time. No goal has been established for this measurement. [Explore the data](#)

404,618 Total jobs
Current as of Oct 2014



KEY METRICS: POPULATION, UNEMPLOYMENT, AND WAGES

Kansas City Population

467,007
number of people

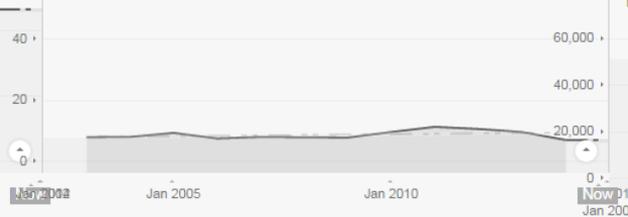
Population growth supports economic growth by creating density and demand for business services. Kansas City's population has seen slow growth over the last decade. No goal has been set for this measurement.



Kansas City's Unemployment Rate

7.2
percent unemployed

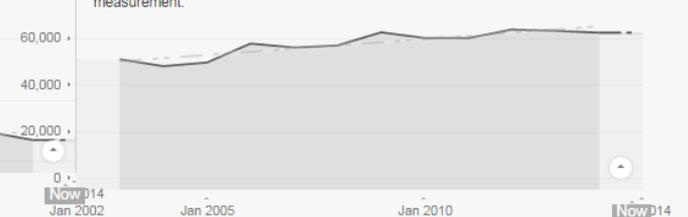
Lower unemployment means more productivity for the city and more income for its residents. No goal has been set for this measurement. These figures come from the Bureau of Labor Statistics.



Average Annual Wage

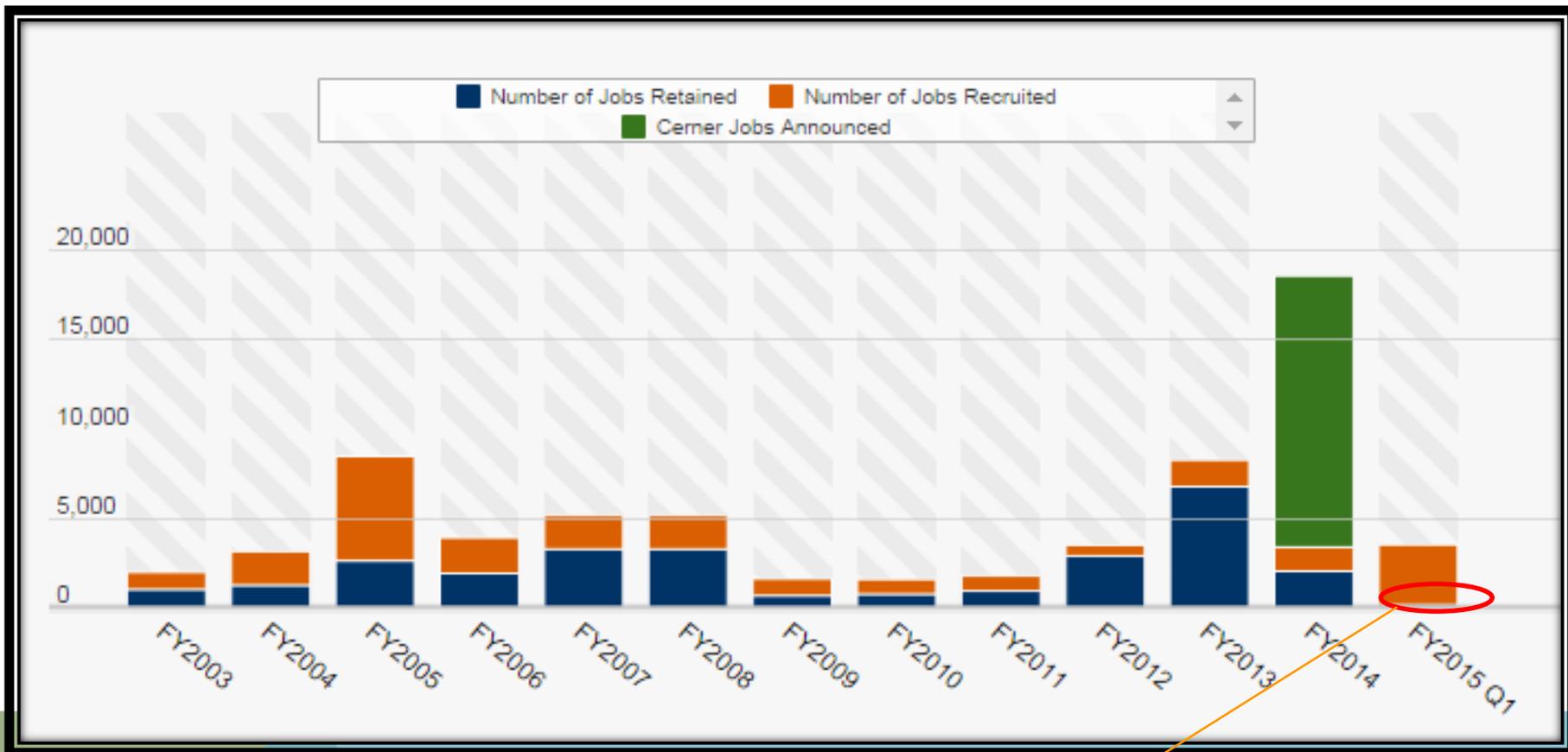
62,916
dollars

Average annual wage shows how jobs translate into income for the City's residents. Growth in this figure represents increased economic opportunity for residents and an increased tax base for the city. No goal has been set for this measurement.



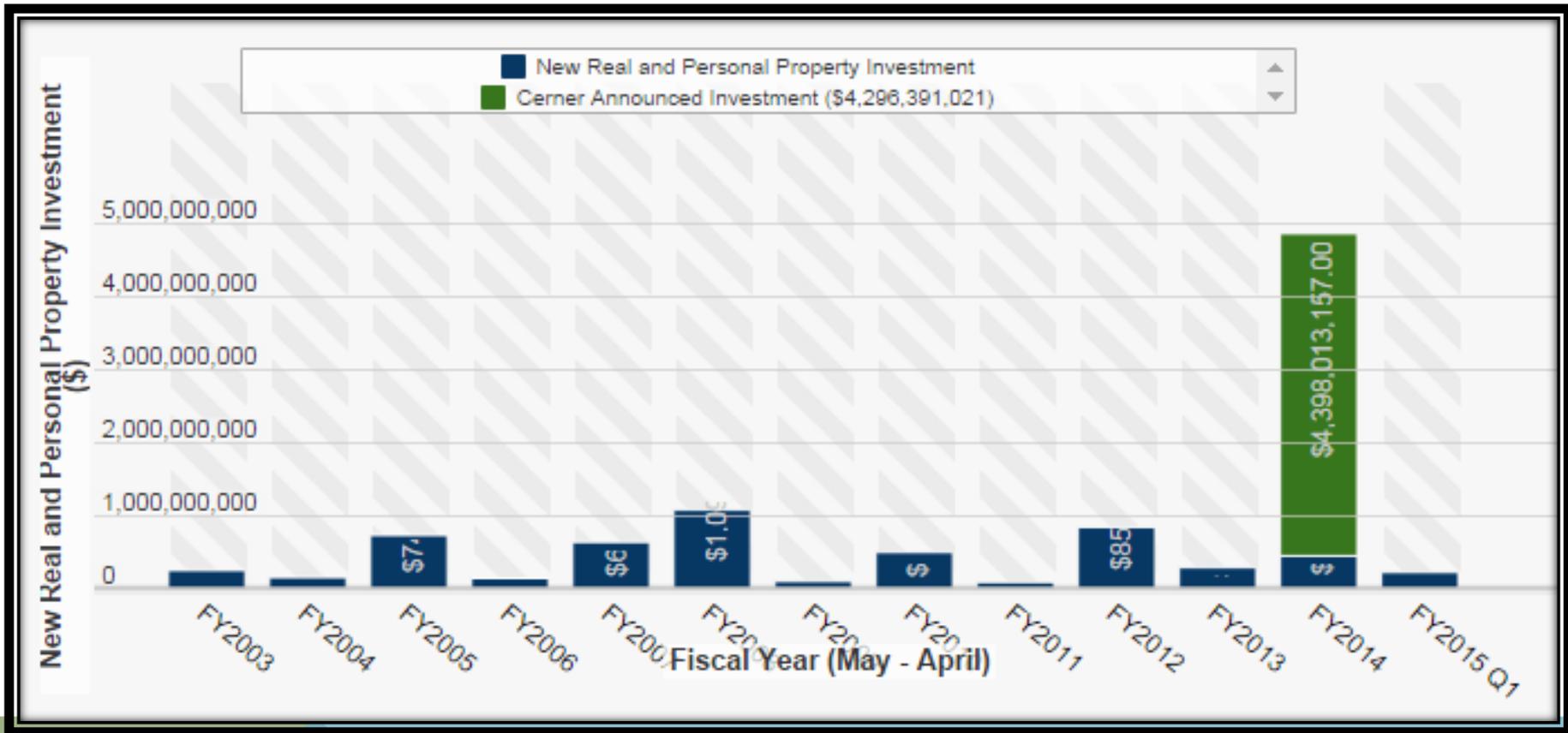
ECONOMIC DEVELOPMENT
CORPORATION OF KC

JOBS CREATED/RETAINED



183 jobs retained in FY15 Q1

NEW REAL AND PERSONAL PROPERTY INVESTMENT



EDC CONTRACT QUARTERLY PERFORMANCE INDICATORS

AdvanceKC Strategy	Measure	FY2015 through 1Q (7/31/14)
Target Sector Support	Announced Projects	7
	Jobs from Announced Projects	1,255
	Existing Business Visits	43
	Investment for Business Development Activities	\$53,101,483.00
Urban Land Use and Revitalization	Approved Projects	4
	Jobs from Redevelopment Projects	2,100
	New Investment for Redevelopment Activities	\$187,703,978
Business Climate	Satisfaction with KC as a Place to do Business	N/A
	Local Tax Incentives Approved	\$44,472,210
	Ratio of Investments to Incentives	4.22:1
Innovation and Entrepreneurship	SBA 504 Loans Closed (\$ and #)	\$0 (0)
	Revolving Loans Closed (\$ and #)	\$55,000 (1)

EDC UPDATES

- **Personnel Updates**
 - PIEA/IDA Executive Director
 - Senior VP, Business & Real Estate Development
 - Coordinator, Entrepreneurship Initiatives
 - Research and Policy Officer
 - EDC Loan Corporation Executive Director
 - Coordinator of International Business Initiatives
- **Administrative accounting functions of the TIF Commission to move to City Hall**
- **Missouri Technology Corporation Grants**

IMPLEMENTATION OF ADVANCEKC STRATEGIES

IMPLEMENTATION TIMELINE FOR ADVANCEKC

Implementation of AdvanceKC

Since the implementation of AdvanceKC was launched in 2012, progress has been made toward some of the plan's strategic recommendations and ground has been laid for others. A chart showing past and future milestones demonstrates the progress on this plan.

AdvanceKC Strategic Plan & Implementation Timeline
(Strategic Plan Recommendations)

Action/Tasks	12	2013				2014				2015				2016			
	Q4	Q1	Q2	Q3	Q4												
1.0 Arts and Leisure																	
1.1 INTEGRATE the findings and recommendations of the Task Force on the Arts into the AdvanceKC framework				■	■	■	■	■	■								

[Explore the data](#)



IMPLEMENTATION: PHASE ONE

Build a strong, yet responsive, economic development process and framework

Create a single point of entry.

Create a direct deal flow process.

Combine all staff.

Single Point of Entry

Project Manager Assigned

EDC Staff Review

Statutory Agency Approval

Council Review

Project Completion



Direct Deal Flow Process

ADVANCEKC PIPELINE

Type and number of projects that have entered the EDC's single point of entry since January 1, 2014

<u>Type</u>		<u>Number of Projects</u>
Job-Based		31
	Active (1)	9
Site-Based		41
	Active (2)	14

Active (1): Interaction within the last two weeks as of September 19, 2014

Active (2): Financial Analysis completed and referred to agency as of September 19, 2014

This includes projects that have been referred to each of the economic development tools: TIF, PIEA, Port, Ch. 353, Ch. 100, LCRA, EEZ, EDC Loan Corp, CDE (NMTC).



IMPLEMENTATION: PHASE TWO

Focus implementation efforts on the 10 strategic categories action items and initiatives

2.0 Business Climate

9.0 Target Sector Analysis



2.0 BUSINESS CLIMATE

Action Item 2.2: Revisit the City of Kansas City's incentives policy based on the dynamics of the AdvanceKC strategy

Economic Development & Incentives Policy was unanimously adopted by the City Council on February 20, 2014.

Values-Based project scorecard was created for jobs and site-based projects. Evaluates a project based on:

1. Number of Jobs & Wage Level.
2. Amount of Investment
3. Geography (Distressed Census Tracts)
4. Target Sector
5. Project Enhancements

- Increases transparency
- Increases consistency
- Increases responsiveness

Project Community Impact Score

Range 0 - 300

Project Assessment	Not Recommended	Low Impact	Standard Impact	High Impact
Score	< 30	30 - 60	61 - 150	> 150

↑
Average score for all projects to date

KCMO INDUSTRY SECTORS



ARTS

20,424 Jobs
\$65,370 Average Annual Earnings



INFORMATION TECHNOLOGY

17,602 Jobs
\$88,843 Average Annual Earnings



ARCHITECTURE & ENGINEERING

15,880 Jobs
\$102,492 Average Annual Earnings



NONPROFIT MANAGEMENT

4,935 Jobs
\$42,310 Average Annual Earnings



HEALTH SCIENCES & SERVICES

42,749 Jobs
\$60,002 Average Annual Earnings



SPECIALIZED MANUFACTURING

10,665 Jobs
\$99,705 Average Annual Earnings



FINANCE & INSURANCE

30,315 Jobs
\$74,418 Average Annual Earnings



SUPPLY CHAIN MANAGEMENT

13,373 Jobs
\$66,583 Average Annual Earnings

KCMO PROJECTED EMPLOYMENT GROWTH FOR KEY INDUSTRIES, 2014-2023

	Industry	2014 Jobs	2023 Jobs	Job Growth or Loss	Percent Change	Location Quotient
	Architecture, Design & Engineering	15,880	18,990	(+)3,110	19.6%	2.42
	Health Sciences & Services	42,749	49,650	(+)6,901	16.1%	1.02
	Arts	20,424	22,825	(+)2,401	11.8%	1.45
	Finance & Insurance	30,315	33,749	(+)3,434	11.3%	1.34
	Information Technology	17,602	18,730	(+)1,128	6.4%	1.94
	Nonprofit Management	4,935	4,999	(+)64	1.3%	1.42
	Supply Chain Management	13,373	13,400	(+)27	0.2%	1.51
	Specialized Manufacturing	10,665	10,618	(-)47	(-)0.4%	3.7

Source: Economic and Workforce Update for KCMO by MARC – July 2014

EMPLOYMENT MISMATCH

**MORE
WORKERS
THAN JOBS**



CONSTRUCTION
4,506 unemployed
382 job openings



**ACCOMMODATIONS
& FOOD SERVICE**
2,901 unemployed
886 job openings



MANUFACTURING
1,487 unemployed
929 job openings

**MORE
JOBS THAN
WORKERS**



**ADMINISTRATIVE
& SUPPORT**
1,681 unemployed
2,493 job openings

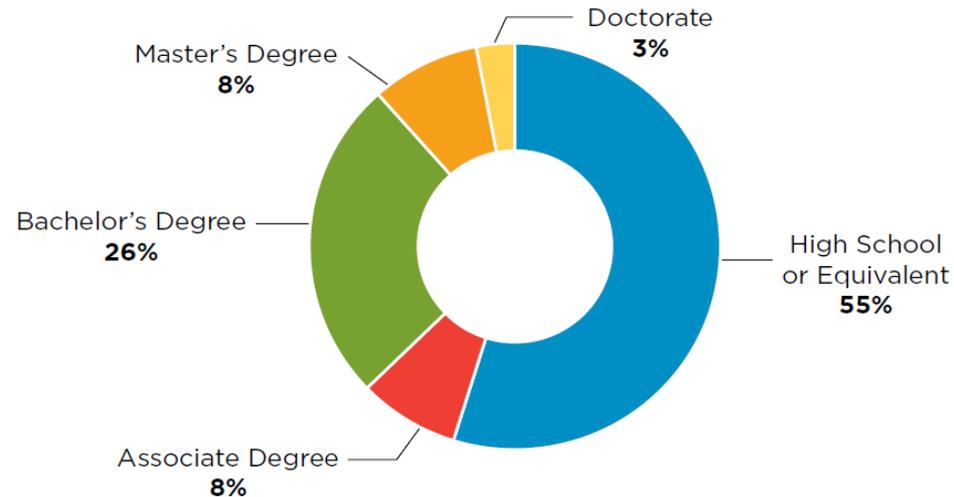


HEALTH CARE
1,710 unemployed
3,032 job openings



**PROFESSIONAL
SERVICES**
1,178 unemployed
2,619 job openings

JOB POSTINGS BY EDUCATION



Aligning Target Sector Support
with the AdvanceKC Strategy
8.0: Talent Development and
Education

*Source: Economic and Workforce Update
for KCMO by MARC - July 2014*



9.0 TARGET SECTOR SUPPORT

Action Item 9.1: Develop research-supported Action Agendas for Kansas City's priority target business sectors

	<u>Sectors:</u>	<u>Chair Person:</u>	<u>EDC Staff:</u>
1	Health Sciences & Services	TBD	Jeremy Davis
2	Nonprofit Management	Susan Miller	Bernardo Ramirez
3	Specialized Manufacturing / Supply Chain Management	Tom Roberts	Matt Jarrett
4	Financial Services	Darcy Howe	Drew Solomon
5	Information Technology	Greg Cotton	Drew Solomon
6	Arts	Paul Tyler	Josh Best
7	Design/Engineering	Jay Tomlinson	Steve Rinne

-	<u>Steps/Process:</u>
1	Identify Chairperson & EDC Staff
2	Research & define subsectors of interest
3	Recruit members of the Advocacy Council
4	Hold initial meetings with Advocacy Council & stakeholders
5	Create documentation that highlights existing assets to assist in attraction & expansion
6	Identify major issues of concern
7	Engage activities for goal/objective realization with timelines
8	Report progress on goals & objectives to EBRE Committee
9	Annual report & public outreach

BUSINESS SURVEY: UNDERWAY!

2014 Business Survey is being conducted NOW across the City!

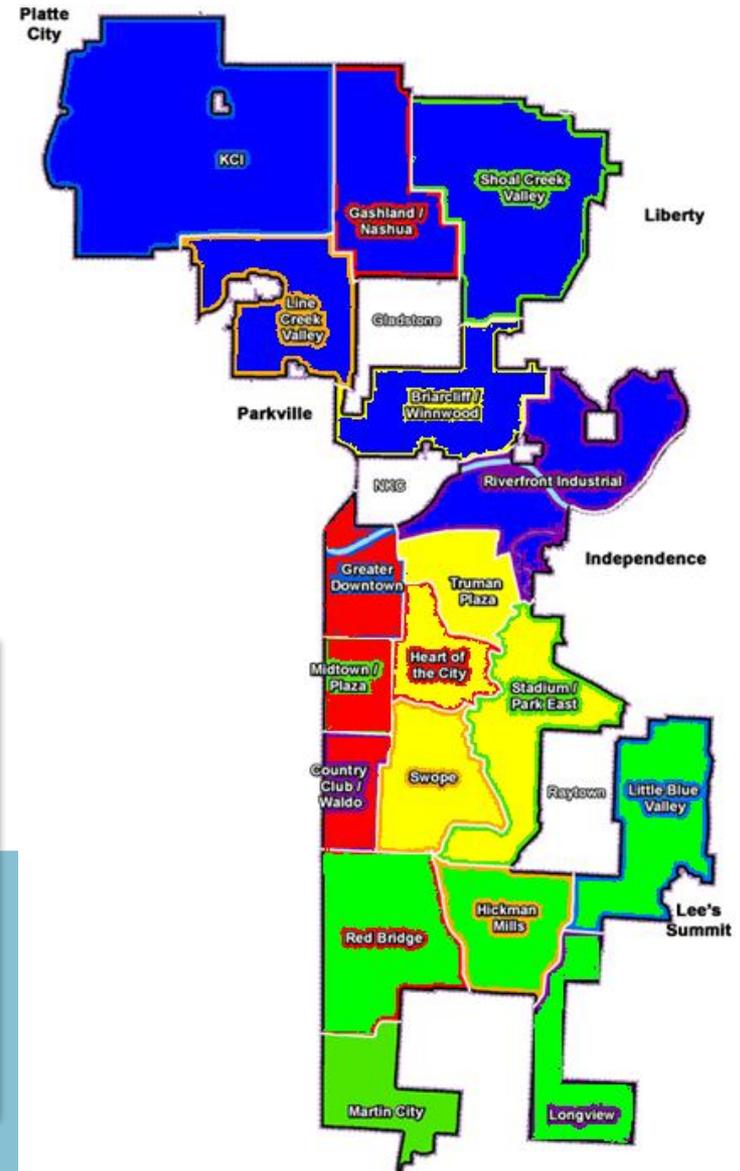
Revision Process:

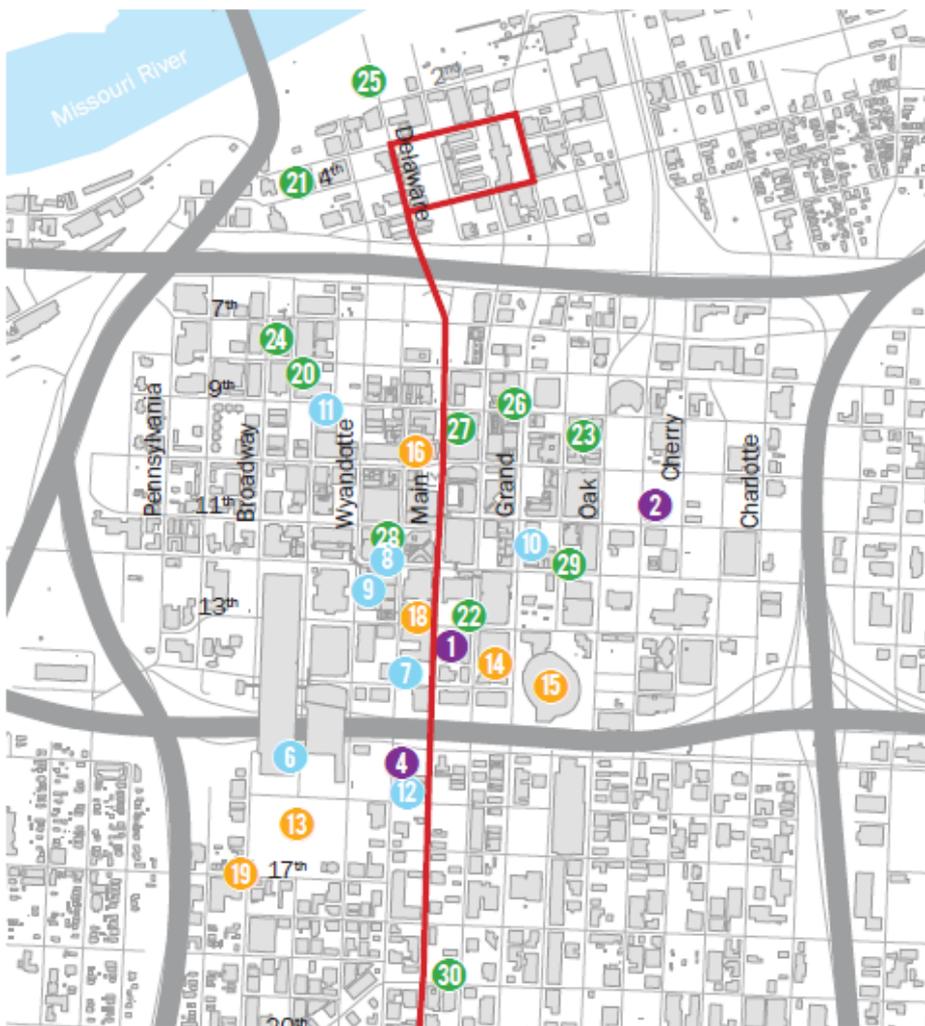
- Cost-savings and collaboration between City and the EDC
- Alignment with Citizen Satisfaction Survey
- Effectiveness assessment

At the next KCStat we will be able to provide exciting survey data and strategies will be announced.

New in 2014:

1. Data will be analyzed by EDC Territory.
2. Data will be analyzed by Industry Sector.
3. Trends over the past 4 years will be presented.





DOWNTOWN: A SMART INVESTMENT

\$800,000,000 + announced public/private investment since the streetcar TDD was approved by voters.

\$250,000,000 across 13 projects stated in a published quote that the streetcar was a factor in their move to the TDD.

WHAT WE'RE HEARING

"It really became a more feasible project with the streetcar"

DAN MUSSER, SENIOR VP, ZIMMER REAL ESTATE SERVICES,
QUOTED IN THE KANSAS CITY BUSINESS JOURNAL, 12/13/13

COLUMBUS PARK REDEVELOPMENT
\$70 MILLION

COMMERCE TOWER CONVERSION
\$71 MILLION

"Our decision to commit to residential and other services for millennials and other folks is tied to that streetcar"

BOB BERKIBILE, ARCHITECT & PROJECT PARTNER
QUOTED IN THE KANSAS CITY STAR, 11/29/13

"The streetcar project...prompted us to double the size of our development and increase our investment in Kansas City by \$20 million."

JOHATHON ARNOLD, PRINCIPAL & CEO, ARNOLD DEVELOPMENT GROUP
FROM PROJECT'S DEVELOPMENT PROPOSAL DOCUMENT

2ND & DELAWARE MULTIFAMILY PROJECT
\$40 MILLION

STREETCAR TDD PROJECT FACILITATION PROGRAM

The program provides for the following enhanced services and features:

- Designated Staff and a Development Assistance Team
- One-Stop Permit Application and Plans Submittal
- Expedited Plan Reviews
- Inspections Conducted the Next Business Day

WHAT WE'RE IMPACTING

We've

EXPEDITED



PERMIT REVIEW TIME

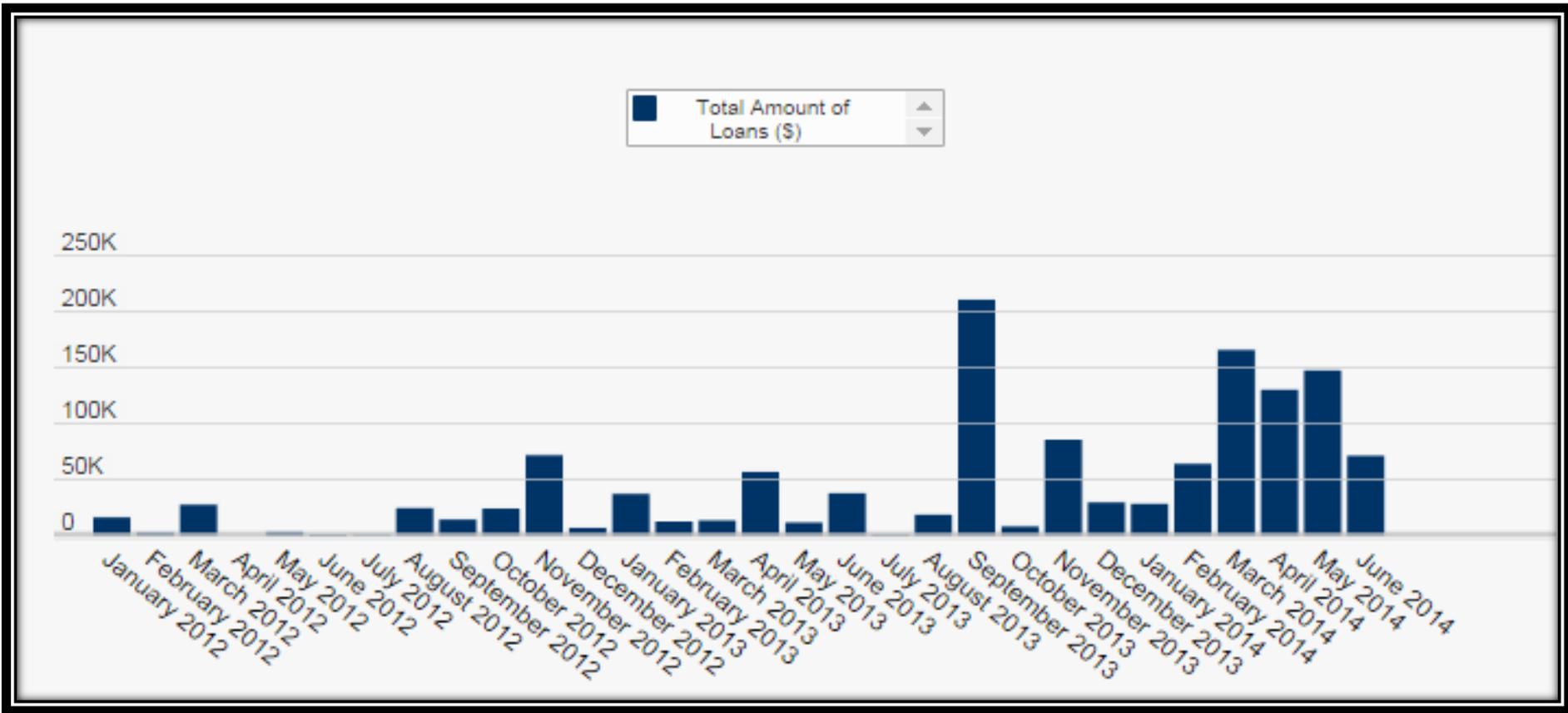
for

35
TDD PROJECTS

since August
2013

ENTREPRENEURSHIP AS AN ECONOMIC ENGINE

JUSTINE PETERSEN SMALL BUSINESS MICROLOANS

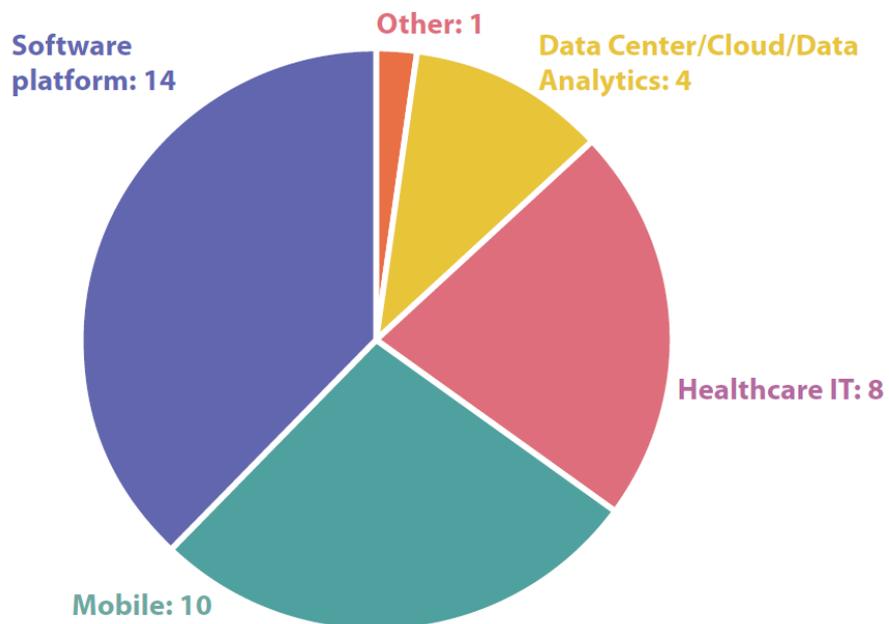


ENTREPRENEURIAL SUPPORT: DIGITAL SANDBOX

23 new KC-based companies created



Funded Development Projects



Source: *Building America's Most Entrepreneurial City Report*

DIGITAL SANDBOX | KC

Where innovators come to play.

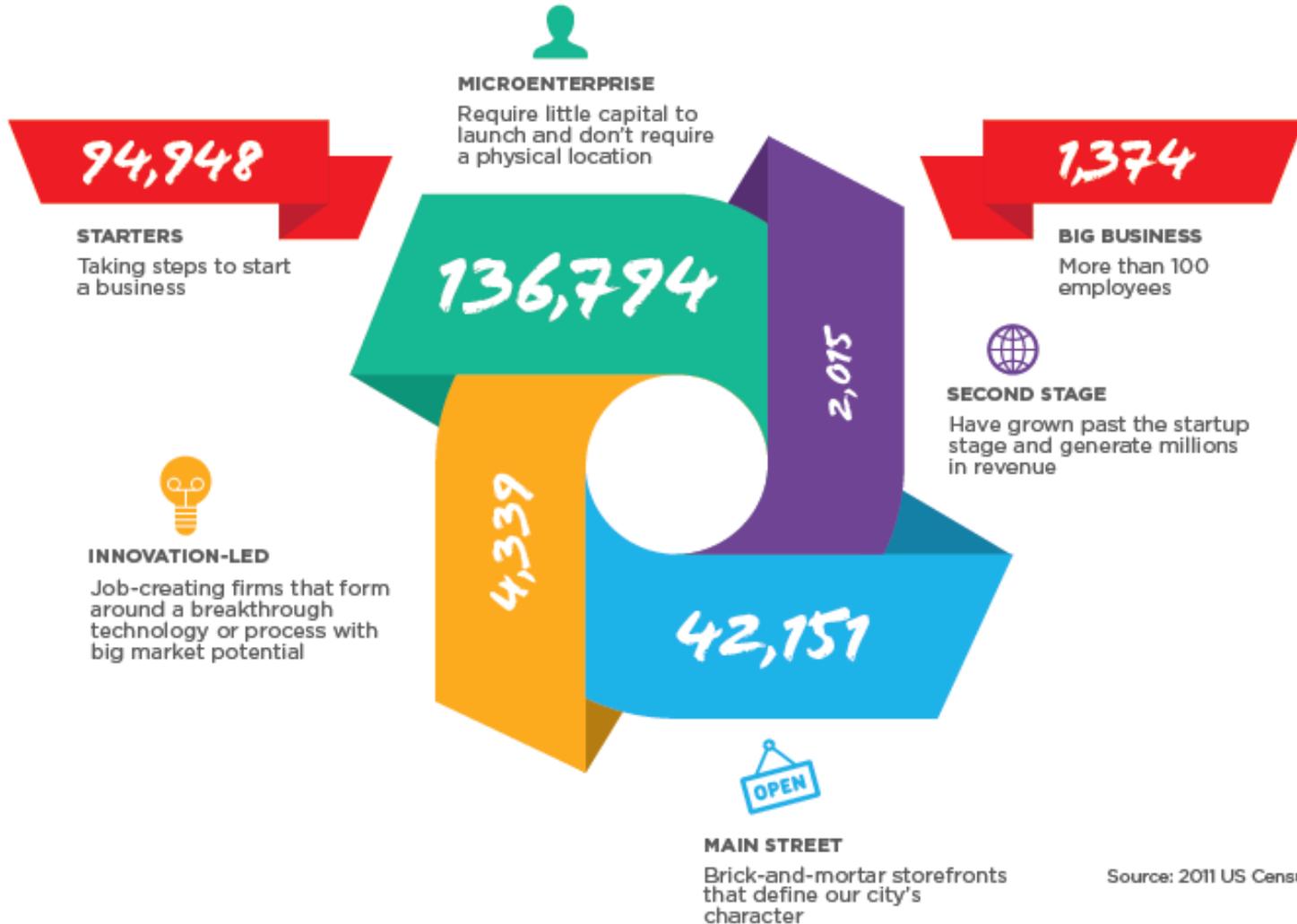
Working with more than 250 early-stage concepts, to date, this effort has resulted in:

- 37 proof-of-concept projects funded for area startups
- 10 companies founded/ co-founded by women-technology entrepreneurs
- 23 new KC-based companies created
- 26 companies have secured follow-on investment funding
- \$10.2 million in new, add-on investment raised for KC start-ups
- 154 new area jobs created
- \$1.6M in new sales from DSB funded companies

ENTREPRENEURIAL SUPPORT: WE CREATE KC REPORT



+ IT TAKES ALL TYPES OF ENTREPRENEURS TO SUSTAIN A VIBRANT ECONOMY.



Source: 2011 US Census Bureau Data

STREAMLINE BUSINESS PRACTICES

Streamline Business Practices

59

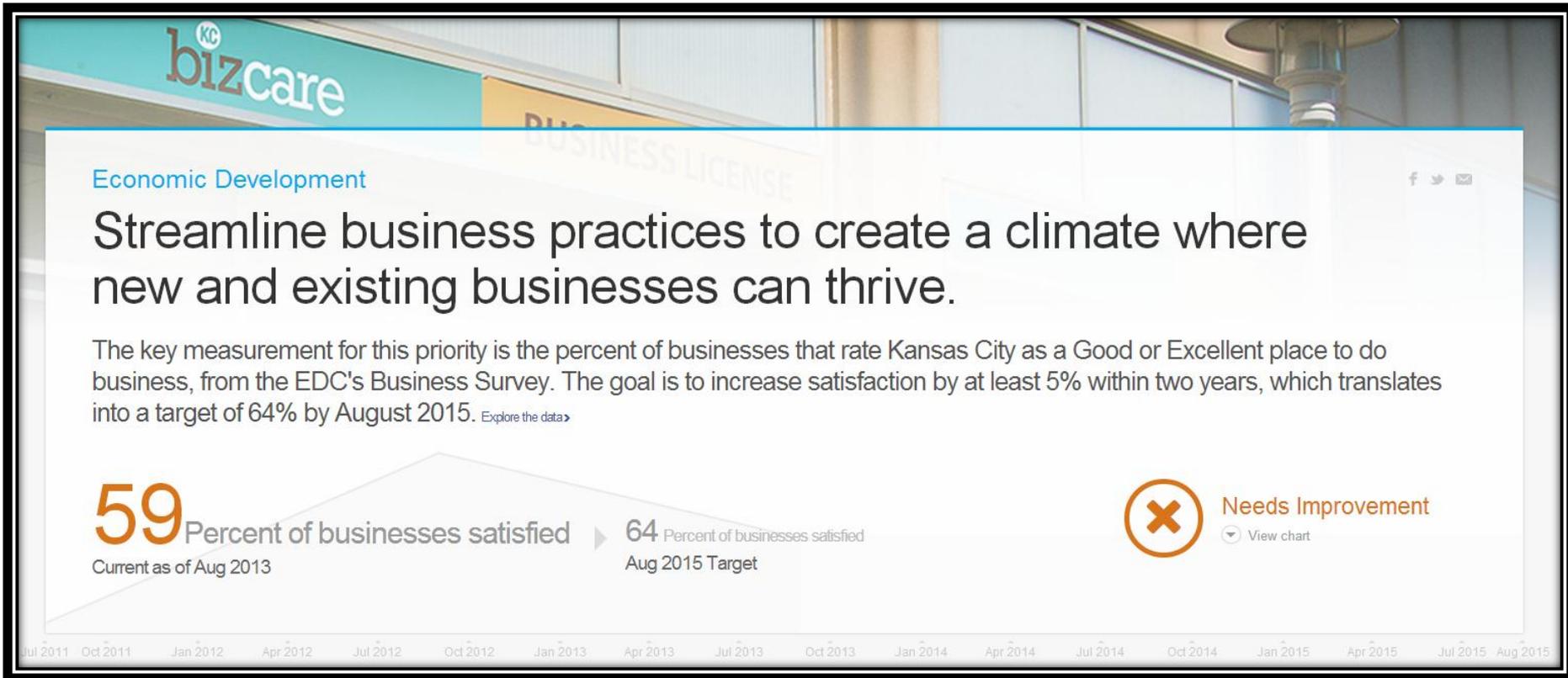
Percent of businesses satisfied



needs improvement

[Detail](#) >

KEY METRIC: BUSINESS SATISFACTION WITH KANSAS CITY AS A PLACE TO DO BUSINESS



BUSINESS SATISFACTION WITH KANSAS CITY AS A PLACE TO DO BUSINESS – ALL RESPONSES

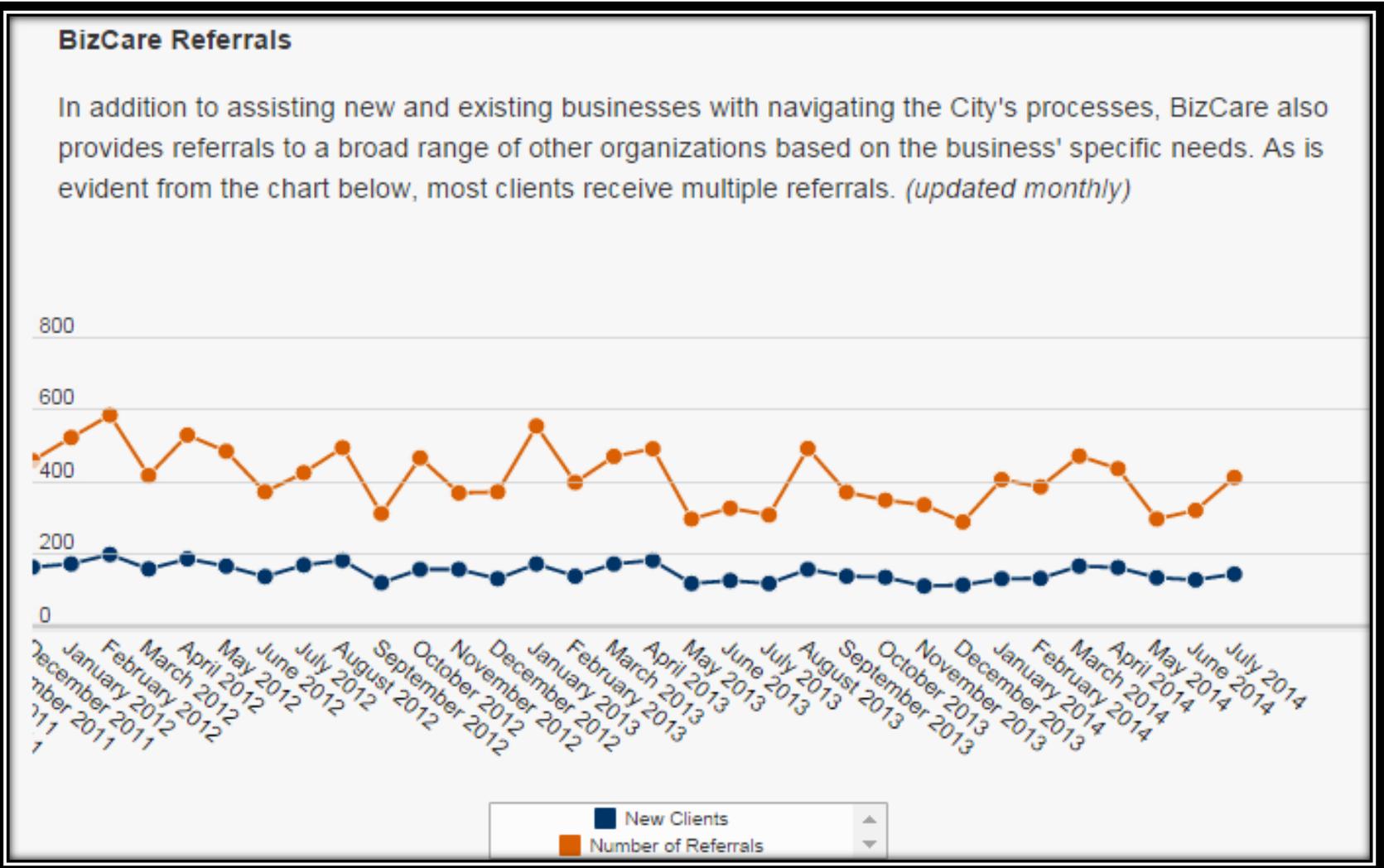


KANSAS CITY BIZCARE

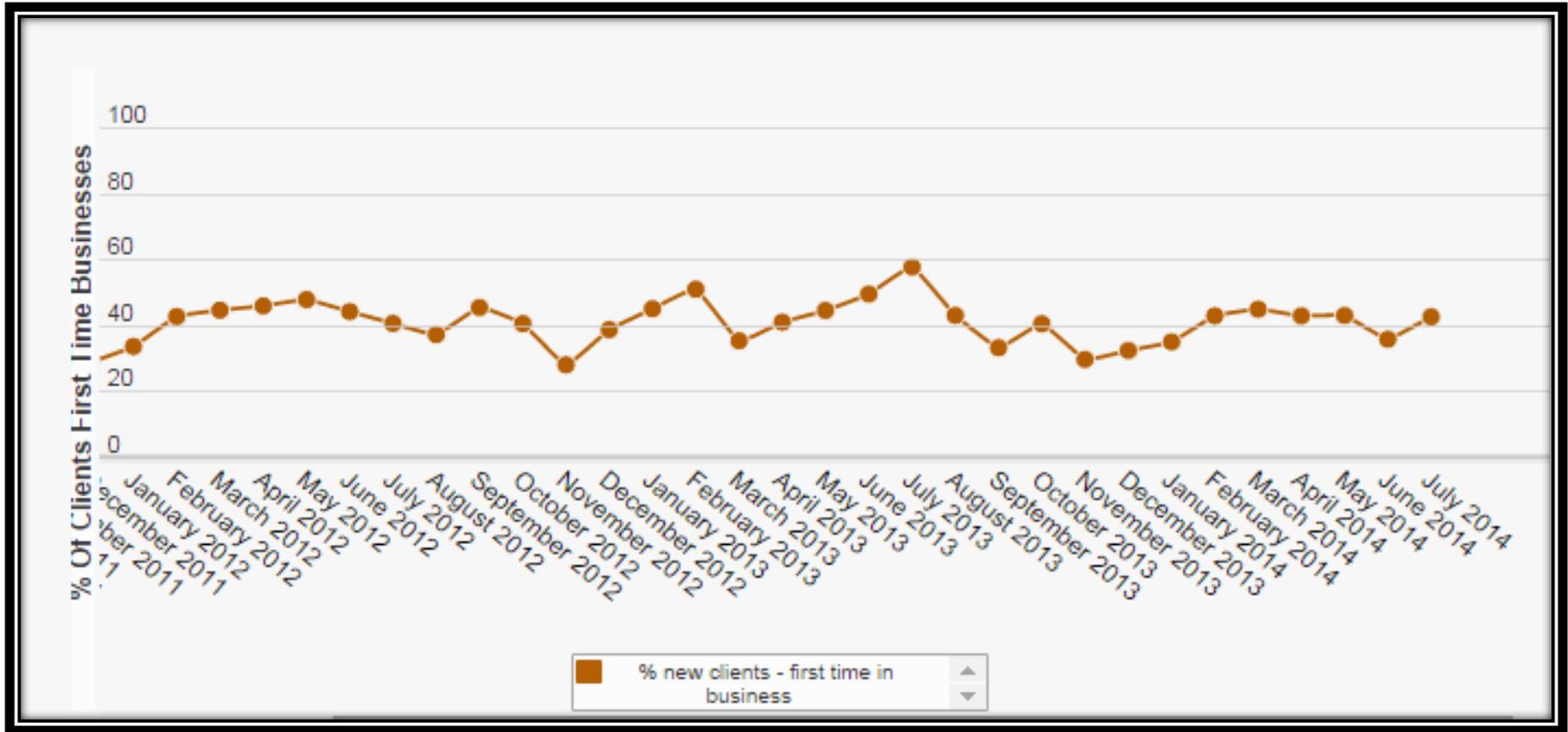
BIZCARE CLIENTS AND REFERRALS

BizCare Referrals

In addition to assisting new and existing businesses with navigating the City's processes, BizCare also provides referrals to a broad range of other organizations based on the business' specific needs. As is evident from the chart below, most clients receive multiple referrals. *(updated monthly)*

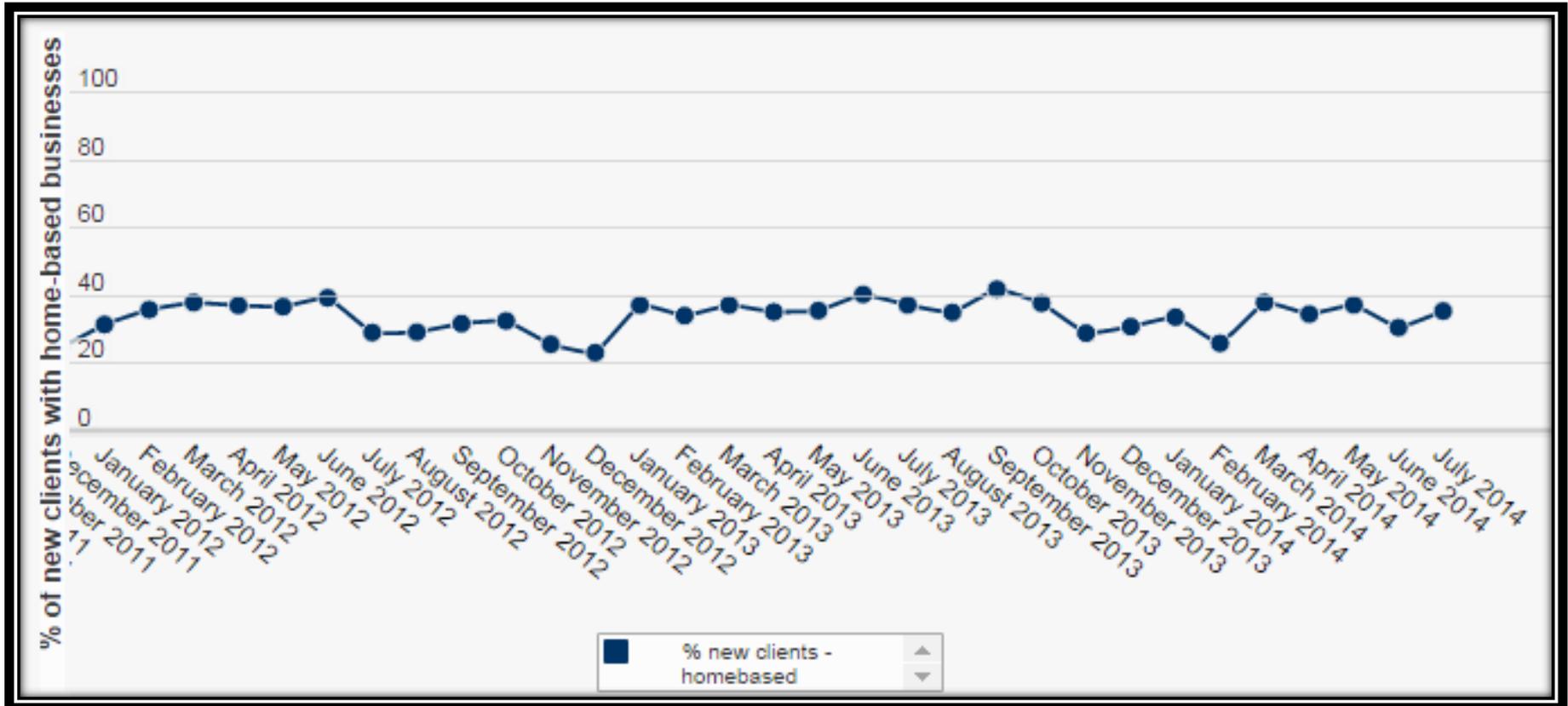


FIRST-TIME BUSINESSES AS CLIENTS OF BIZCARE



Source: kcstat.kcmo.org (BizCare)

HOME-BASED BUSINESSES AS CLIENTS OF BIZCARE

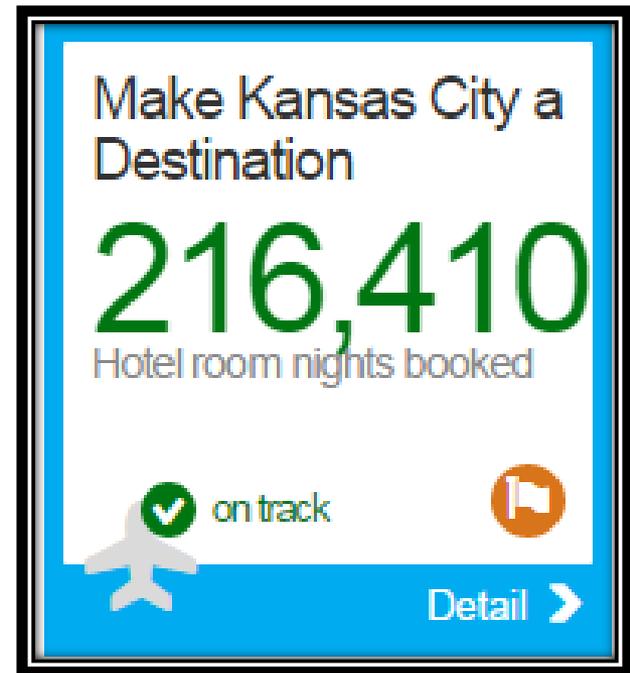


Big Ideas for Small Business network:

- Originally launched by Chicago and National League of Cities in December 2012
- Kansas City has been involved since beginning
- Provides a platform for local small business development leaders discuss best practices to help small businesses thrive
- Ideas generated are compiled in a comprehensive toolkit to empower business owners

**Big Ideas for Small Business Summit happening
NOW in KANSAS CITY!**

MAKE KANSAS CITY A DESTINATION



CONVENTION ACTIVITY: VISITKC AND CEF

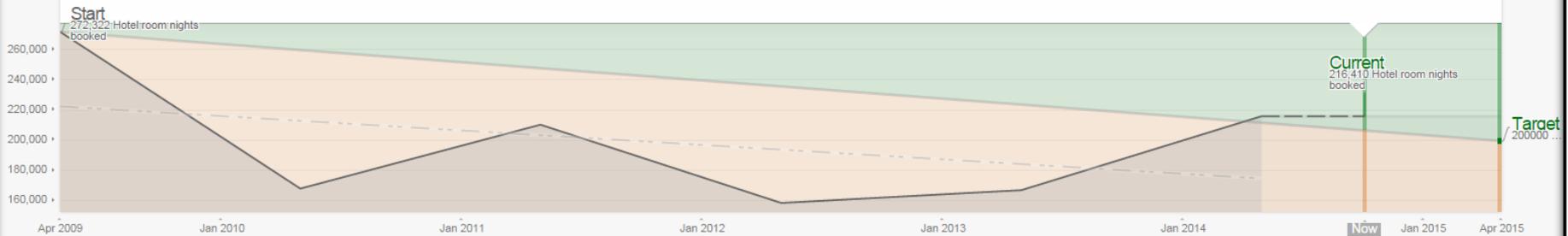
WORKLOAD INDICATOR – HOTEL ROOMS BOOKED FOR FUTURE YEARS

The key measurement for this priority is the number of hotel room nights booked due to meetings at the convention center. A decreased number of hotel room bookings (which are for future years) means that the city can anticipate a decreased number of convention visitors (resulting in less economic impact). The target for FY2015 is 200,000 room night bookings. [Explore the data >](#)

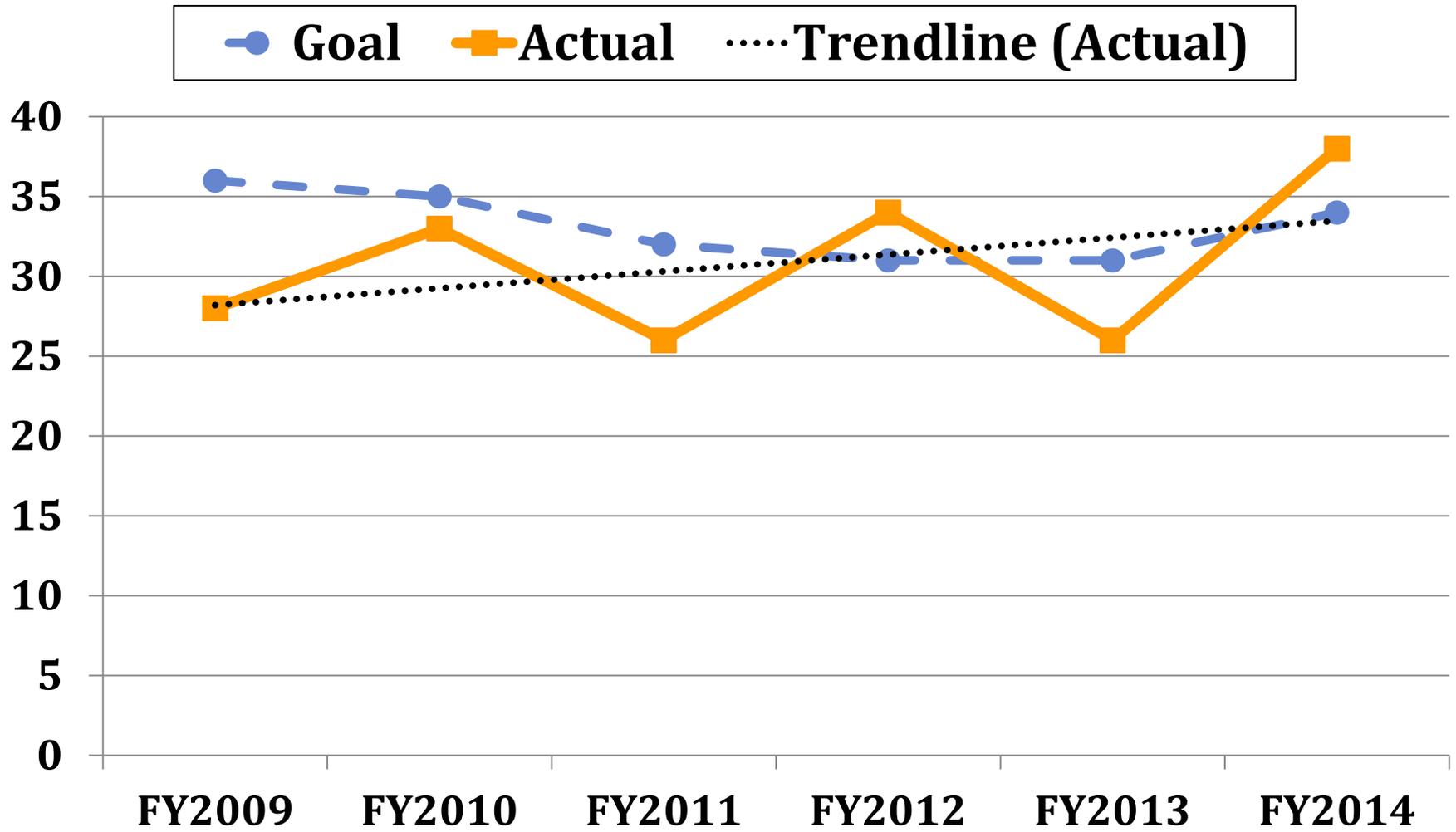
216,410 Hotel room nights booked
Current as of Apr 2014

200,000 Hotel room nights booked
Apr 2015 Target

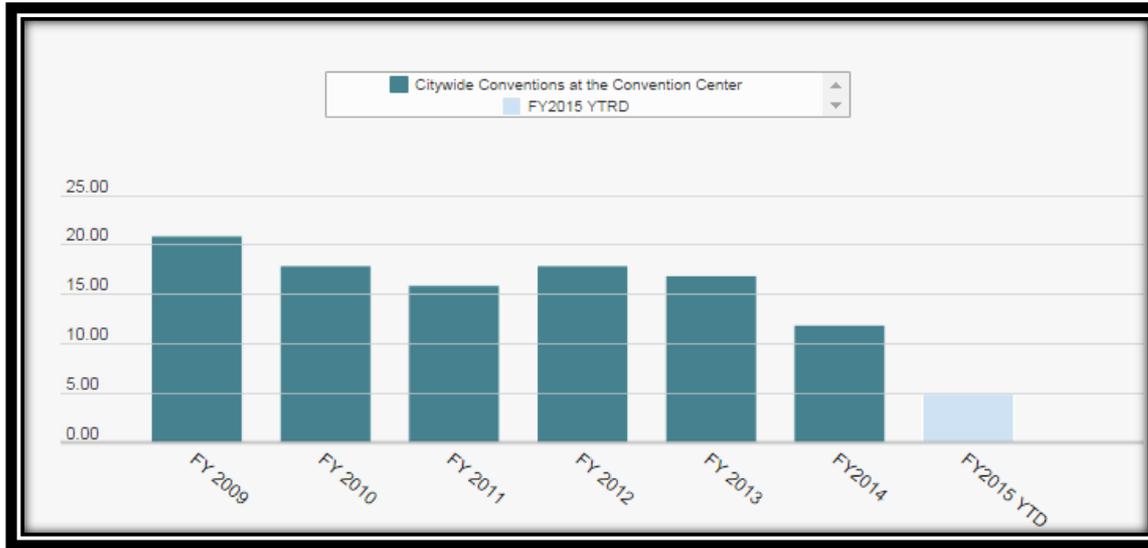
 **On Track**
[Hide chart](#)



WORKLOAD INDICATOR: CONVENTION CENTER BOOKINGS FOR FUTURE YEARS



ACTUAL "CITYWIDE" CONVENTIONS HELD AT CONVENTION CENTER AND ATTENDANCE



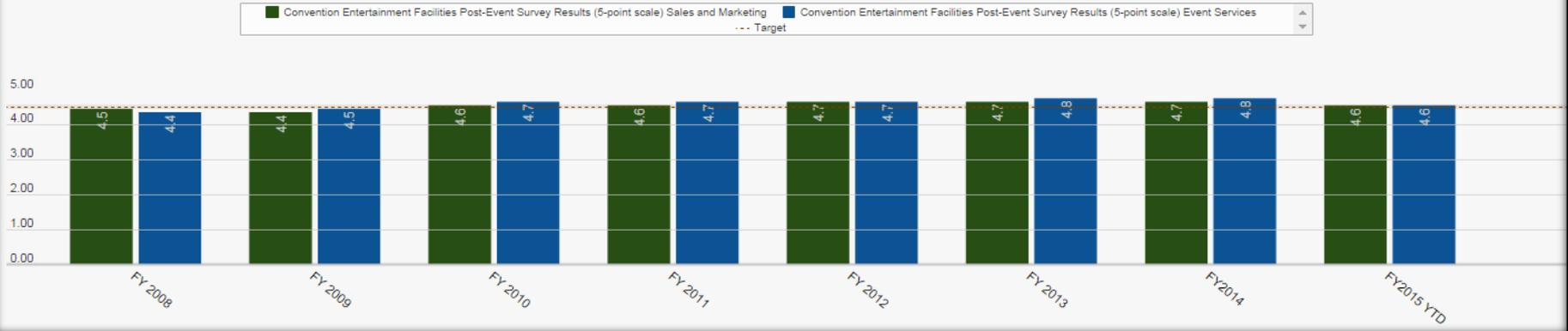
VISITKC PERFORMANCE TARGETS

Bookings	FY2014 YTD GOAL (May-September)	FY2014 YTD
Definite Bookings (For Future Years)	110	119
Definite Room Nights	142,500	124,865
Convention Center Bookings	15	11
Convention Center Room Nights	83,330	66,908
Sales and Marketing	FY2014 YTD GOAL	FY2014 YTD
Sales Leads (room nights)	416,665	517,917
Sales Conversion ration	25%	22.5%
Convention Attendance (meetings held)	n/a	158,937
Other Indicators	FY2014 YTD	
Incremental trips generated through marketing programs	109,900	
Post-convention survey ratings	86%	
Visitor Interactions (through August)	8,304,968	

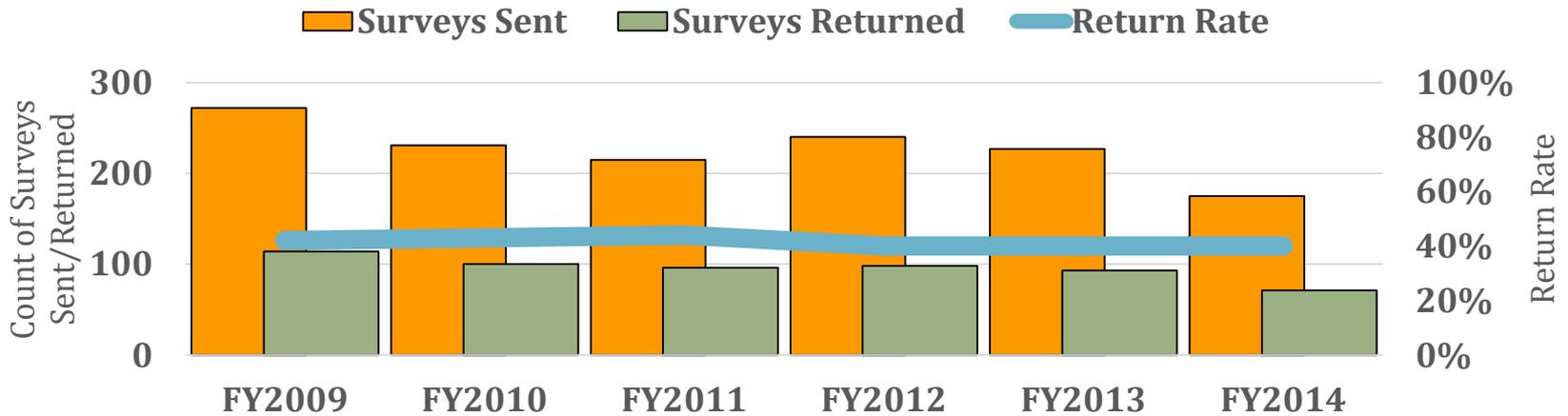
CONVENTION CENTER CUSTOMER SERVICE

Convention Facilities Post-Event Survey

The City's Convention and Facilities Department, which manages the City's convention facilities, surveys event managers to gauge satisfaction with the city's infrastructure and services in this area. The department closely monitors these response, and provides follow-up action when low results are received. The trend for both the Sales and Marketing and Event Services Division has been on an upward trend and has consistently met the department's target. *(updated quarterly)*



Convention Survey Return Rate



Source: kcstat.kcmo.org (Convention and Entertainment Facilities Dept.)

MEDIA RELATIONS

KC in the News

THE NEW YORK TIMES – AUG. 19

"Millennials Going to Kansas City, to Live and Work"

YAHOO! TRAVEL – AUG. 25

"7 Underrated, Intriguing U.S. Cities You Need to Visit"

CONDE NAST TRAVELER – SEPT. 3

"6 Underrated American Cities for LGBT Travelers"

HUFFINGTON POST – SEPT. 26

"America's Top 5 Cities to Keep On Your Radar"

Others include USA Today, NBC's Today Show & Saveur

"7 Underrated but Intriguing U.S. Cities You Need to Visit"
– Yahoo! Travel



America's Top 5 Cities To Keep On Your Radar

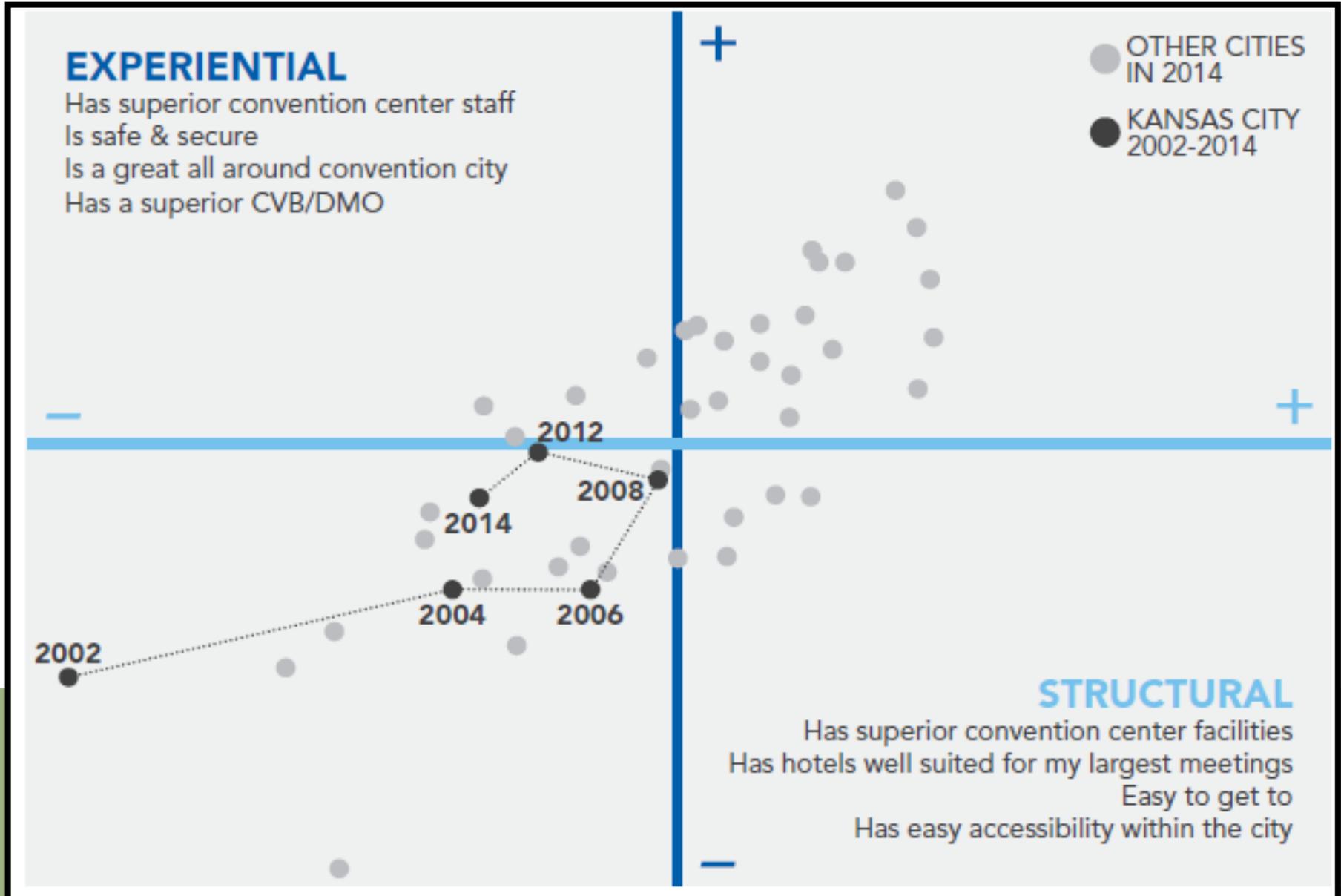
The Huffington Post | By Carly Ledbetter

Posted: 09/26/2014 7:00 am EDT | Updated: 09/28/2014 9:50 pm EDT

1. **Kansas City is THE place to be.**



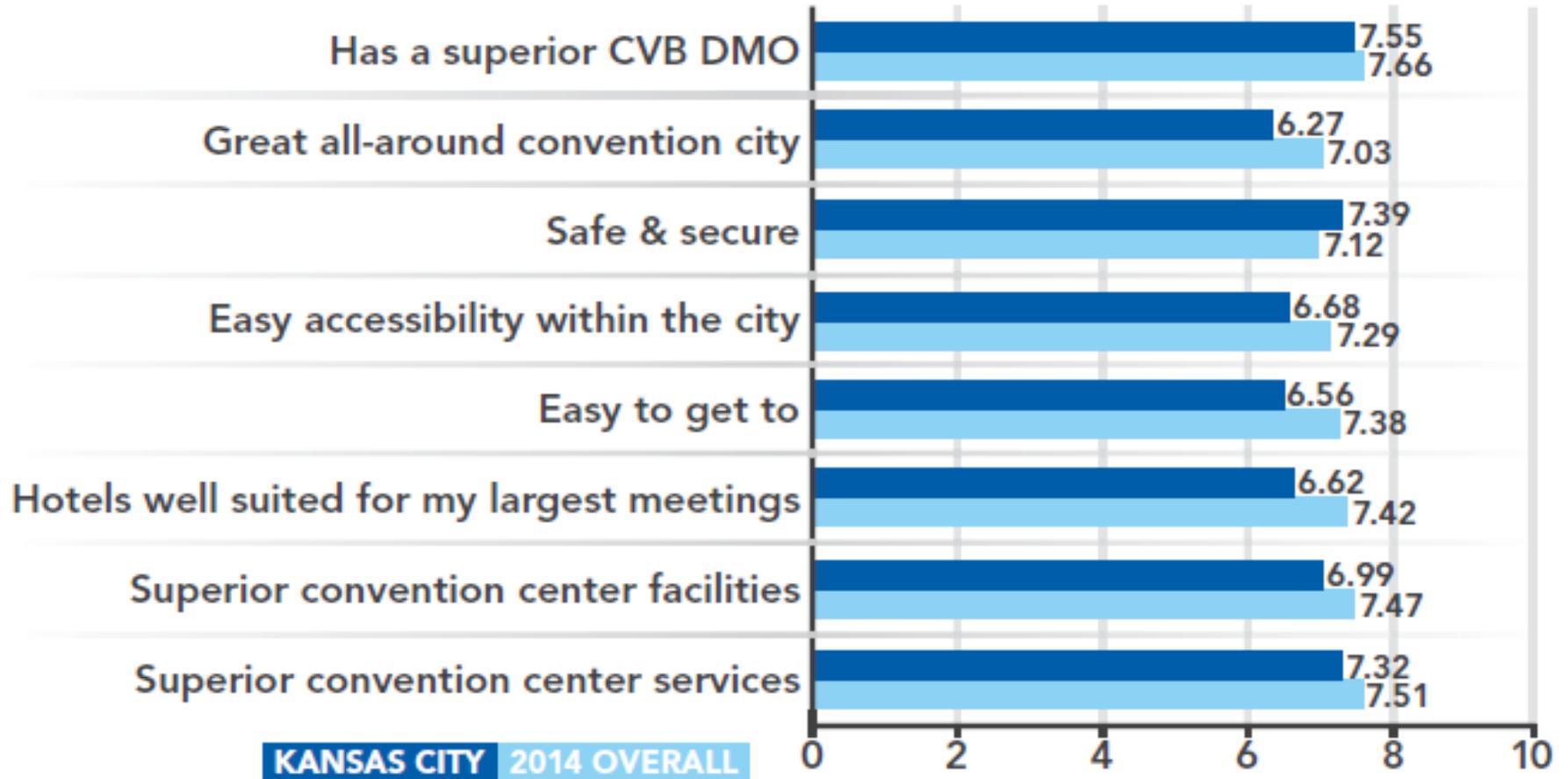
WATKINS MEETING PLANNER RESEARCH – KC Ranks 32 of 40



Source: 2014 Watkins Research Group Meeting planner survey ranking of 40 cities

WATKINS MEETING PLANNER RESEARCH

KANSAS CITY VS. 2014 OVERALL MEAN



Arts & Culture Promotion

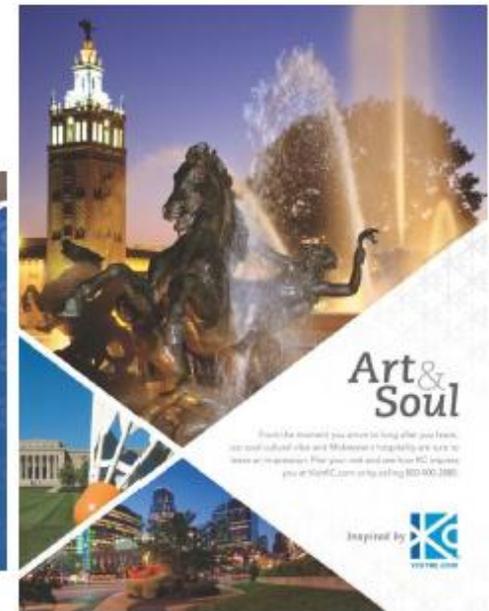
Arts & Culture is integral to Visit KC brand, which emphasizes Midwestern creativity.



"KC on KC" video series features local filmmakers view of KC with videos on arts, jazz, food and more.



Advertising and publications prominently feature arts & cultural assets.

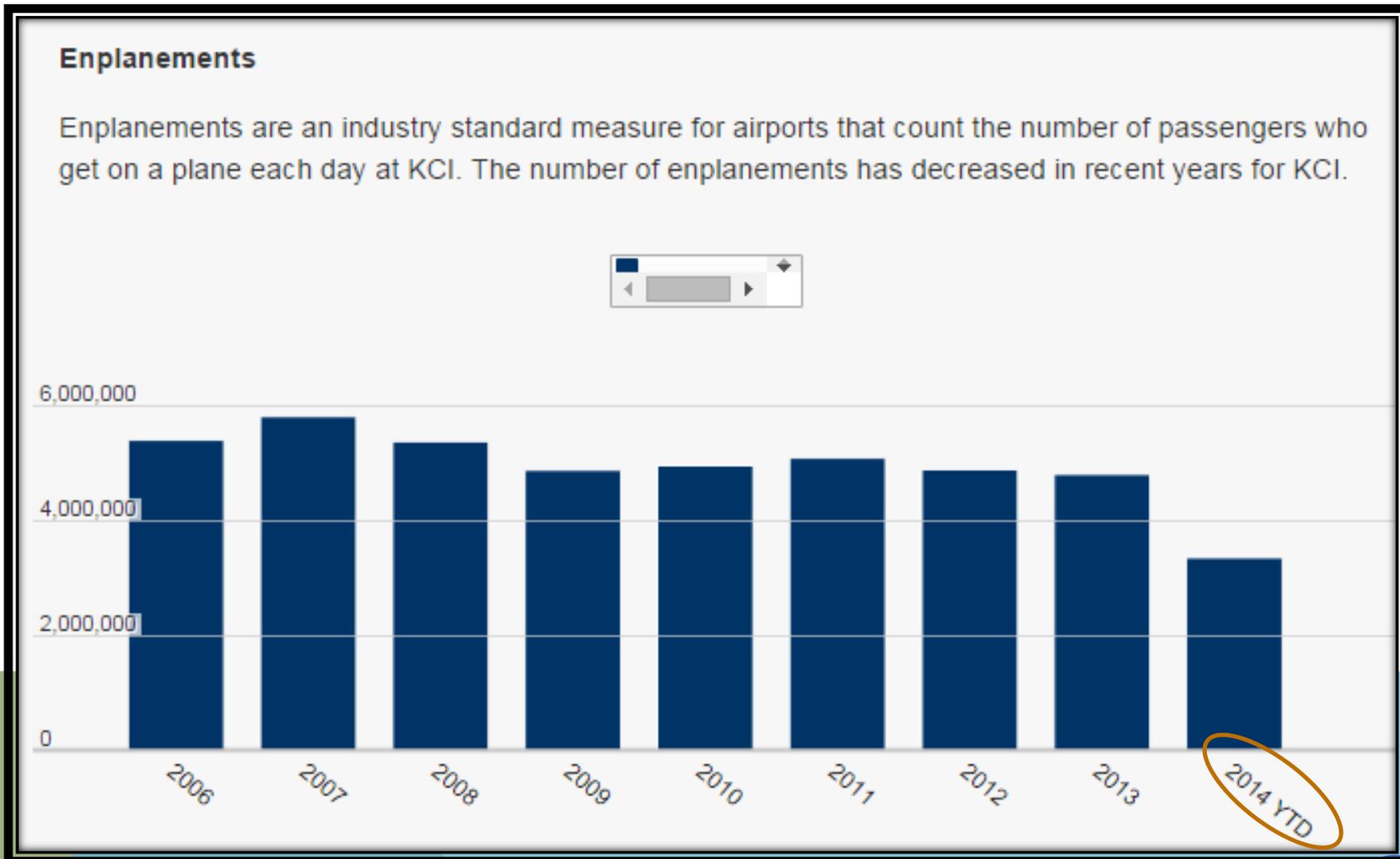


Arts & Culture featured on VisitKC.com including partnership with *KC Studio* magazine to feature their content each month on website.

AIRPORT ACTIVITY

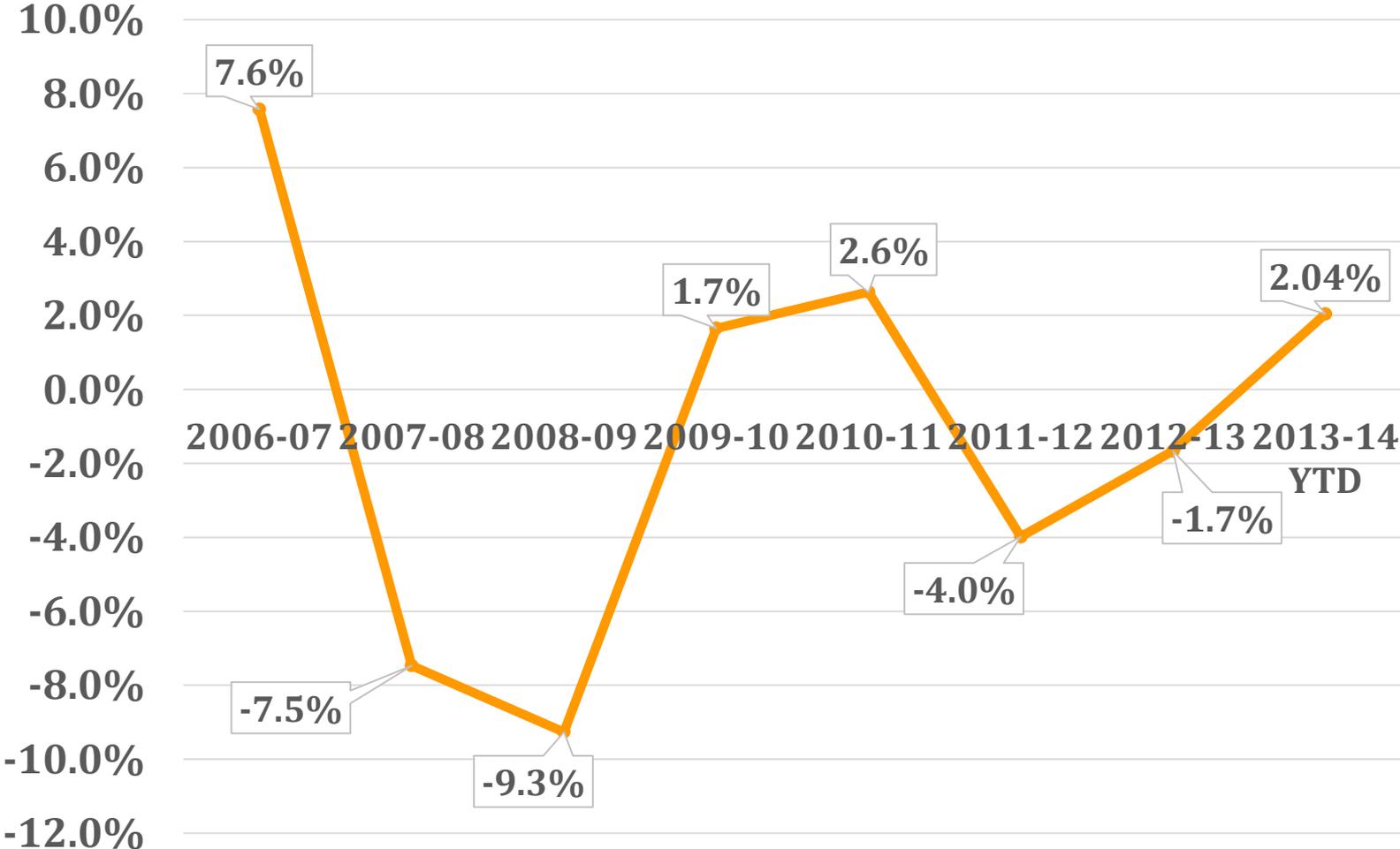
ENPLANEMENTS AT KCI

(ALL PASSENGERS BOARDING PLANES)



CHANGE IN ENPLANEMENTS OVER TIME

— Percent Change in Enplanements



Source: Aviation Department

ANNUAL AIRLINE SEATS (ONE WAY)

KCI Annual Airline Seats (One Way)

6,567,591
annual airline seats

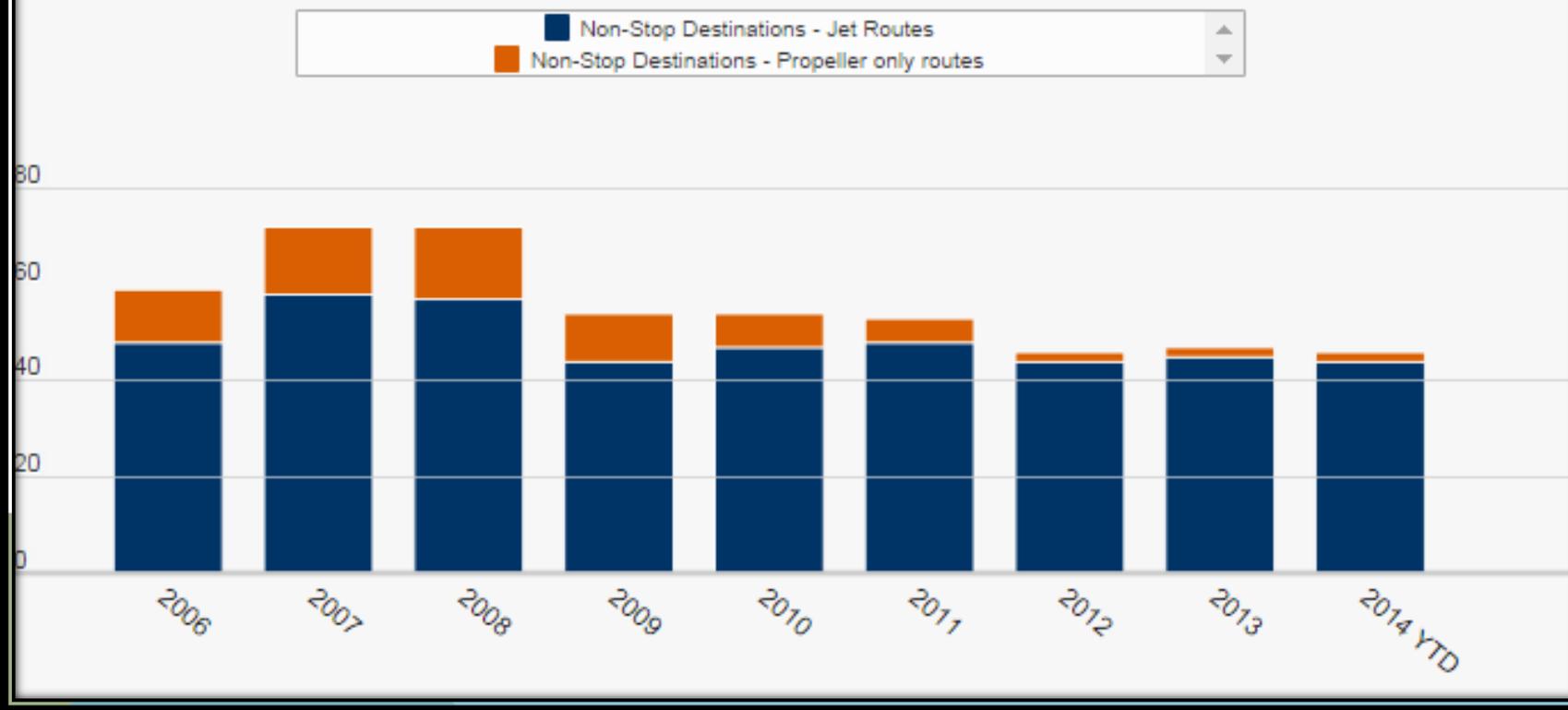
Another measurement of Kansas City as a destination for travel is the annual number of seats available on flights leaving Kansas City International Airport (when looking at the "peak" or highest day of the week). A decreasing number of available seats means less capacity to bring visitors to and from Kansas City.



NON-STOP DESTINATIONS

Number of Non-Stop Destinations

Non-stop destinations are cities that KCI has direct flights to, that do not require a connection in another city. Over time, the number of non-stop destinations to small markets, such as Hays, Kansas have been eliminated by airlines.



TARGET MARKETS FOR KANSAS CITY

<u>Rank</u>	<u>City</u>	<u>Code</u>	<u>Daily Passengers</u>
34	San Antonio, TX	SAT	122.82
35	Orange County, CA	SNA	118.56
36	Austin, TX	AUS	116.70
40	Ft. Myers, FL	RSW	105.11
41	Raleigh/Durham, NC	RDU	93.36
42	Sacramento, CA	SMF	86.11
43	Pittsburgh, PA	PIT	79.59
44	Cleveland, OH	CLE	77.14
46	Columbus, OH	CMH	68.25
47	Jacksonville, FL	JAX	64.14

NEW NONSTOP FLIGHTS TO MIAMI

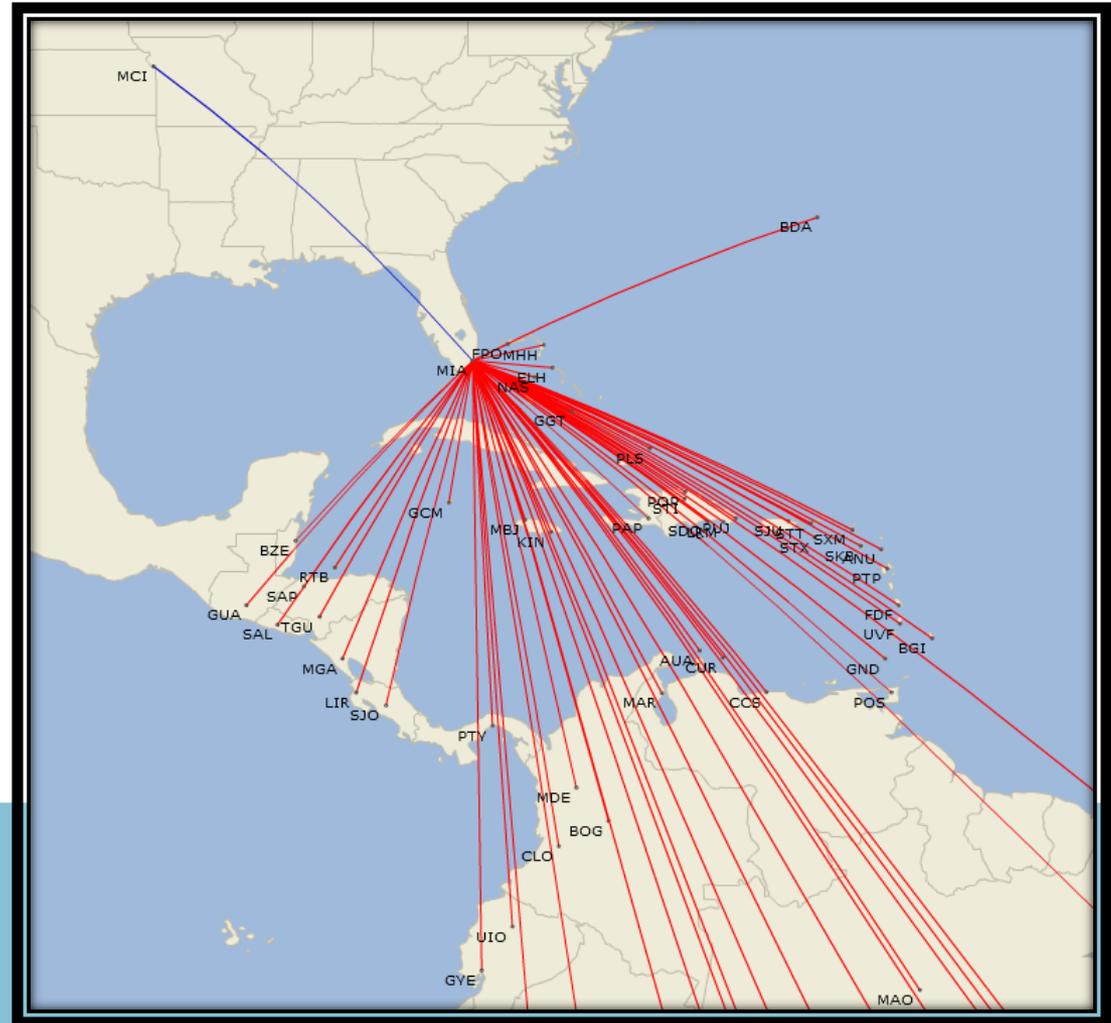
American Airlines

Daily Flights

Boeing 737-800
Aircraft

Connections to Latin
America and
Caribbean

Starting March 2015

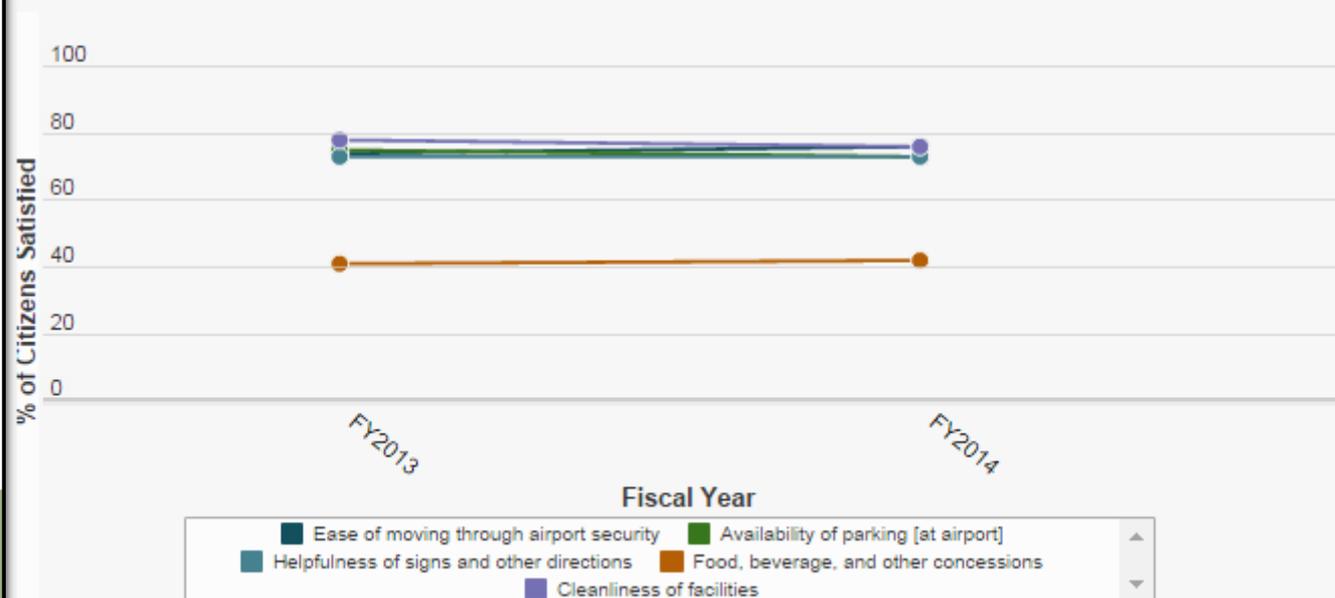


CITIZEN SATISFACTION WITH KCI AIRPORT SERVICES

Citizen Satisfaction with Airport Services

The annual citizen survey includes questions related to airport services. This survey helps represent the perception of residents of Kansas City, Missouri and reflects the opinions of both people who have used the airport and those who have not.

75% of Kansas Citizens indicated that they had visited KCI for a flight or to drop off/pick up.



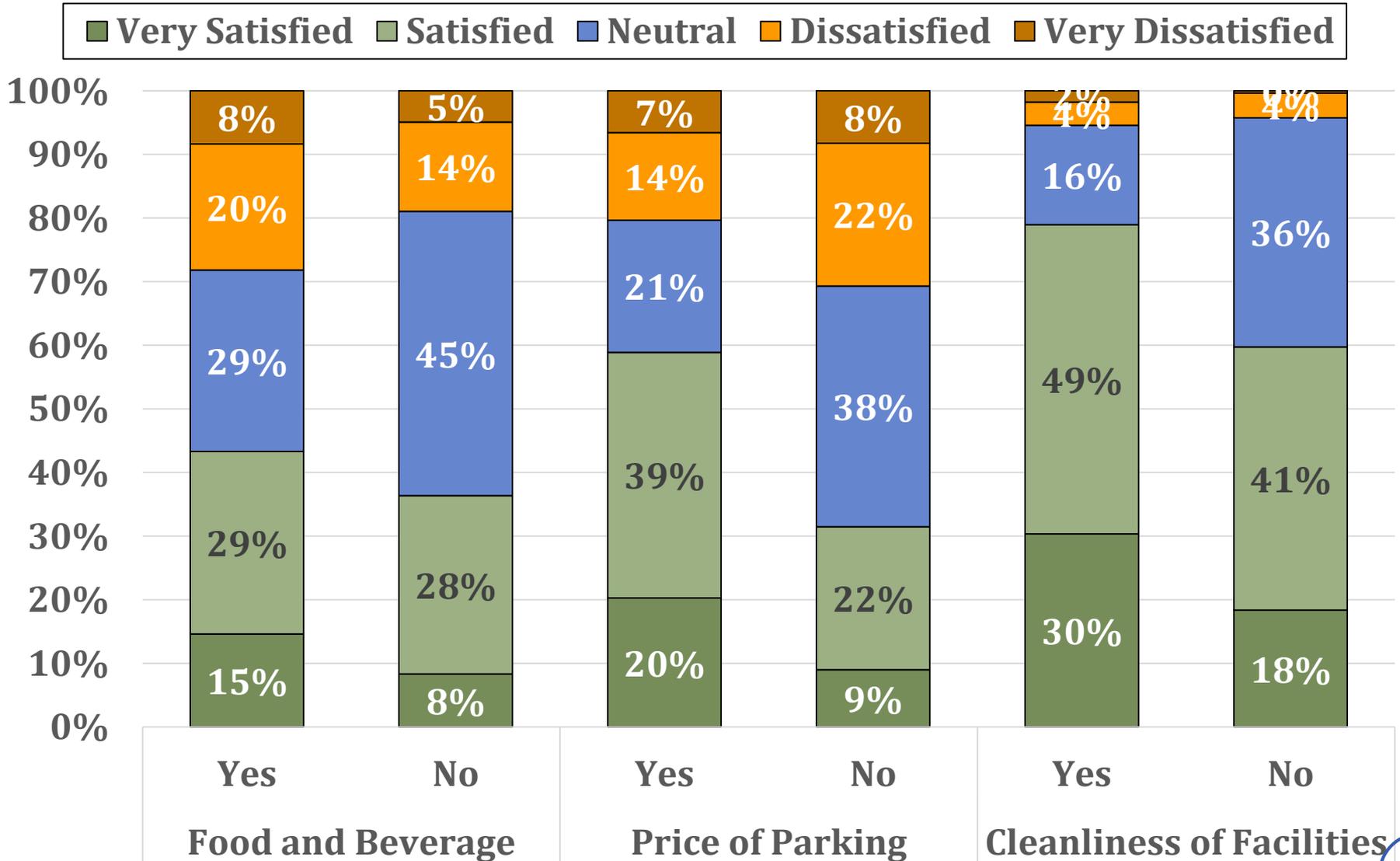
CITIZEN EMPHASIS + SATISFACTION: AIRPORT

Which TWO of the Airport Services listed do you think should receive the MOST EMPHASIS from the City over the next two years?

Airport Service	Satisfaction		Emphasis	I-S Rank	
	2013	2014	2014	2013	2014
Food, beverage, and other concessions	41%	42%	28%	1	1
Price of parking	52%	55%	29%	2	2
Ease of moving through airport security	75%	76%	27%	3	3
Availability of parking	75%	73%	20%	4	4
Cleanliness of facilities	78%	76%	16%	6	5
Helpfulness of signs and other directions	73%	73%	12%	5	6

CITIZEN SATISFACTION BY USER OF AIRPORT

Satisfaction by Have you visited KCI?



Final Thoughts or Questions?

