



# The Economic Impact of Travel in Kansas

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**Tourism Satellite Account  
Calendar Year 2014**



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# Overview



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# 2014 Highlights

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## Traveler Spending

- Travelers spent \$6.2 billion in 2014, generating nearly \$10 billion in total business sales including indirect and induced impacts.
- Traveler spending in Kansas increased 4.5% from 2013.

## Traveler Counts

- Kansas hosted 34.8 million travelers in 2014.
- Both day and overnight travel volume increased, driven by employment growth, improved household confidence, and moderating travel prices.

# 2014 Highlights

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## Jobs

- A total of 92,698 jobs, with income of \$2.8 billion, were sustained by travelers to Kansas last year.
- Traveler-supported employment represents 4.9% of all employment in the State of Kansas.\*

## Taxes

- Tourism-supported tax revenues in 2014 approached \$1 billion and included \$570 million in state and local governmental revenues.
- In the absence of state and local tax revenues generated by travelers, each Kansas household would need to pay \$511 in order to maintain the same level of public services.

\* Bureau of Economic Analysis 2014

# Traveler Spending

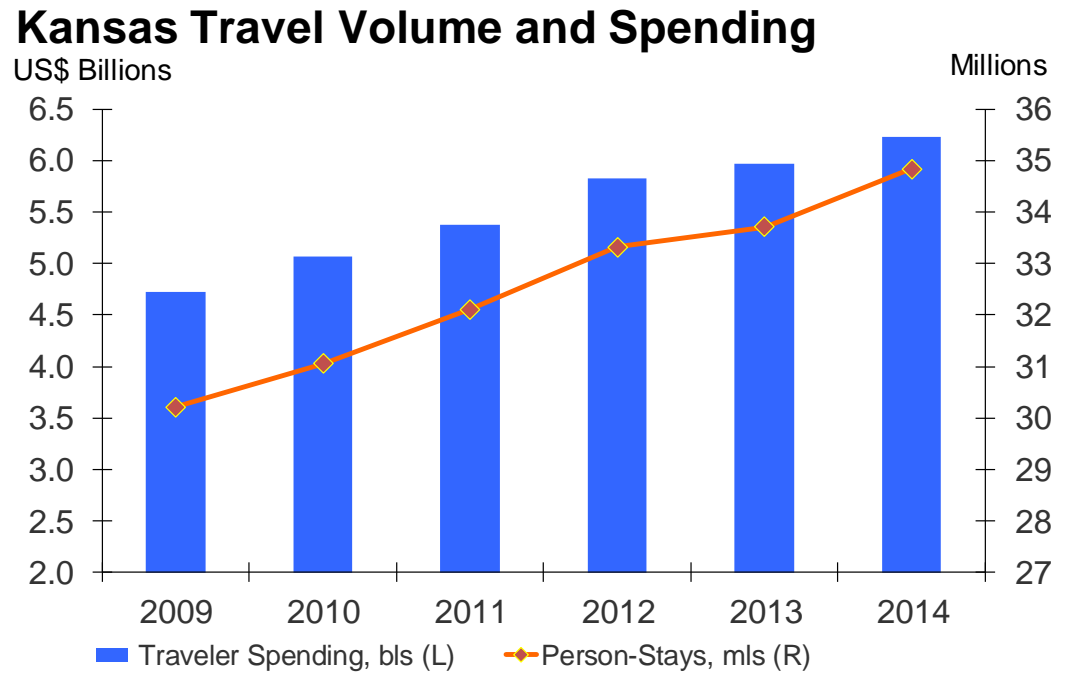


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# Kansas tourism climbs to new heights

- Travel volume and spending both increased in 2014, achieving new peaks.
- Visitation reached 34.8 million and spending reached \$6.2 billion in 2014.



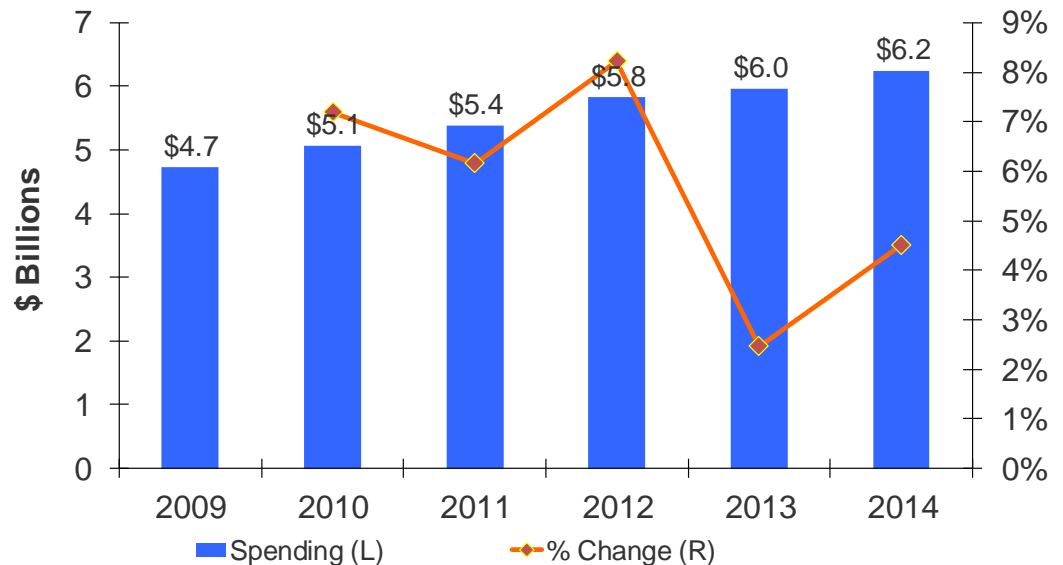
Sources: DK Shifflet, NTTO, Tourism Economics

# Traveler spending continues to expand

- Traveler spending grew 4.4% in 2014, an increase of \$268 million over the previous year.
- Traveler spending growth has averaged 5.7% per year since 2009, a total change of \$1.5 billion.

## Kansas Traveler Spending

US\$ Billions



Sources: DK Shifflet, NTTO, Tourism Economics

# Growth posted in all categories of spending

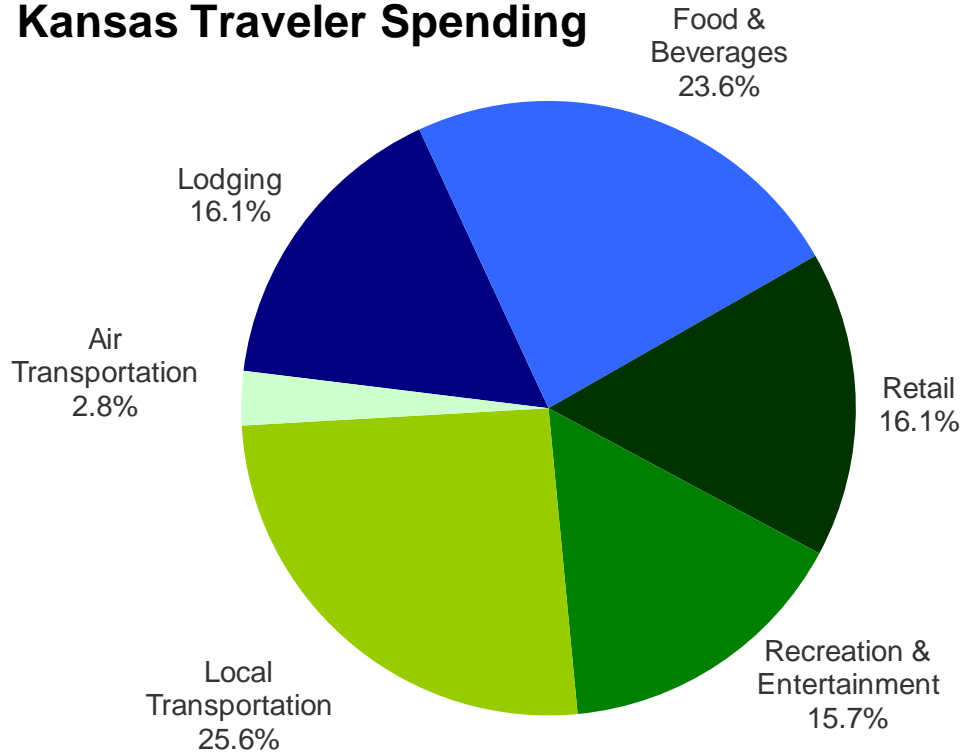
- Lodging spending posted the strongest growth among the major spending categories, driven by room demand and higher prices.
- Local transportation and food & beverage spending also expanded faster than average.

Traveler Spending							
(US\$ Million)							
Sector	2009	2010	2011	2012	2013	2014	% Change
Lodging	\$731	\$750	\$849	\$907	\$941	\$1,007	7.0%
Food & Beverages	\$1,171	\$1,232	\$1,288	\$1,360	\$1,412	\$1,474	4.4%
Retail	\$806	\$862	\$904	\$953	\$968	\$1,003	3.7%
Recreation & Entertainment	\$604	\$743	\$781	\$941	\$958	\$976	1.8%
Local Transportation	\$1,265	\$1,326	\$1,399	\$1,498	\$1,512	\$1,596	5.6%
Air Transportation	\$150	\$155	\$157	\$163	\$173	\$177	2.5%
<b>TOTAL</b>	<b>\$4,727</b>	<b>\$5,067</b>	<b>\$5,379</b>	<b>\$5,822</b>	<b>\$5,965</b>	<b>\$6,233</b>	<b>4.5%</b>
<b>% Change</b>		<b>7.2%</b>	<b>6.2%</b>	<b>8.2%</b>	<b>2.5%</b>	<b>4.5%</b>	



# Traveler spending by sector

## Kansas Traveler Spending



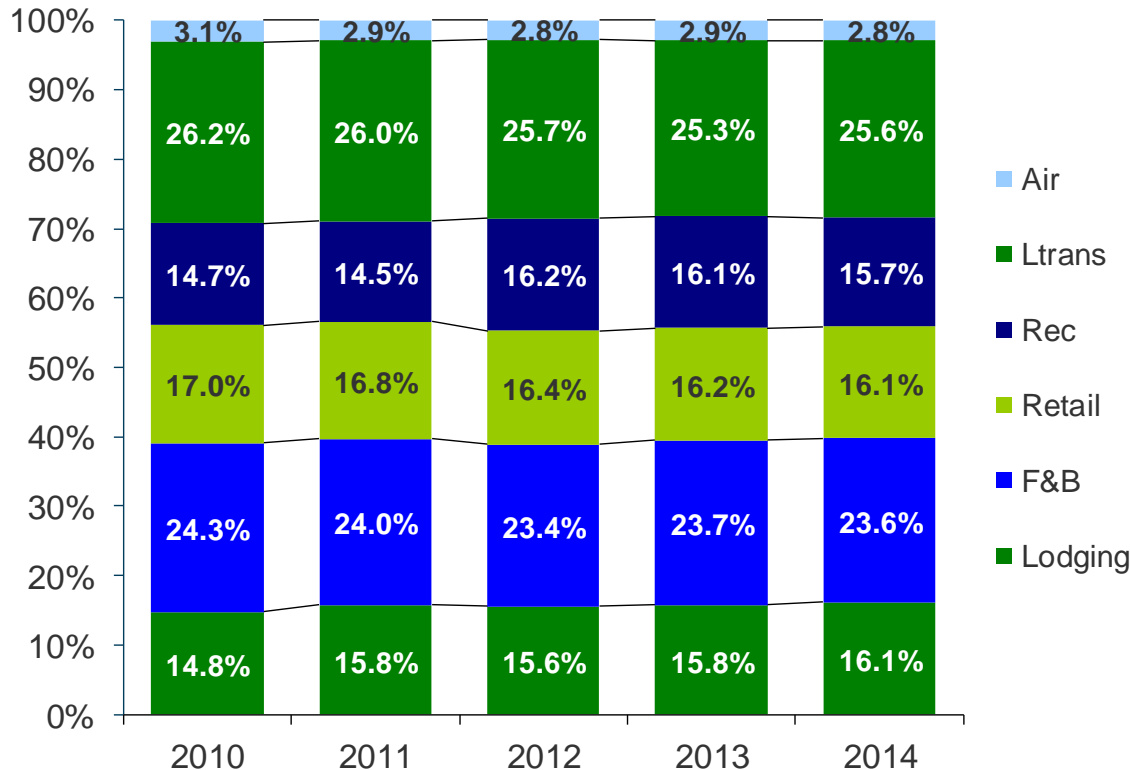
Sources: DK Shifflet, NTTO, Tourism Economics

- Food and beverage and local transportation were key categories of traveler expenditures.
- Spending on lodging, retail, and recreation was equally distributed at about 16% shares for each category.
- The share of travel spending on lodging increased 0.3 percentage points to 16.1 in 2014.

# Traveler spending by sector

## Kansas Traveler Spending

by Year, Share of Total



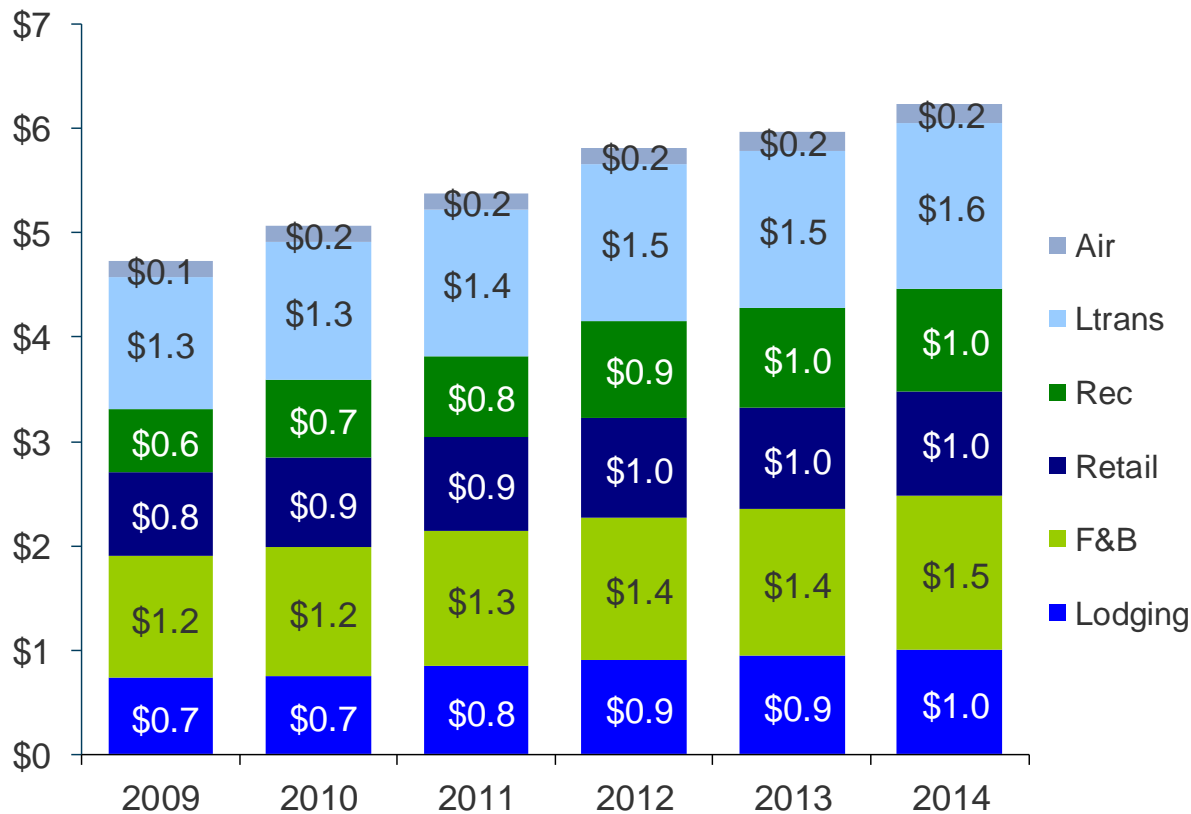
Sources: DK Shifflet, NTTU, Tourism Economics

- The share of the traveler dollar spent on lodging has risen from 14.8% in 2010 to 16.1% in 2014 as both room rentals and room rates have risen.
- The spending share on food and beverages has been the most steady in the last five years.

# Traveler spending by sector

## Kansas Traveler Spending

by Year, Billions of \$



Sources: DK Shifflet, NTTO, Tourism Economics

- Spending grew by \$262 million in 2014 and nearly a half of that increase was in lodging and food & beverage categories.

F&B: Food & Beverages  
 Retail: Retail Shopping  
 Lodging: Accommodations Sales  
 Trans: Non-Air Transportation  
 Rec: Recreation & Entertainment  
 2nd homes: 2nd Home Rental Spending  
 Air: Air Transportation Spending

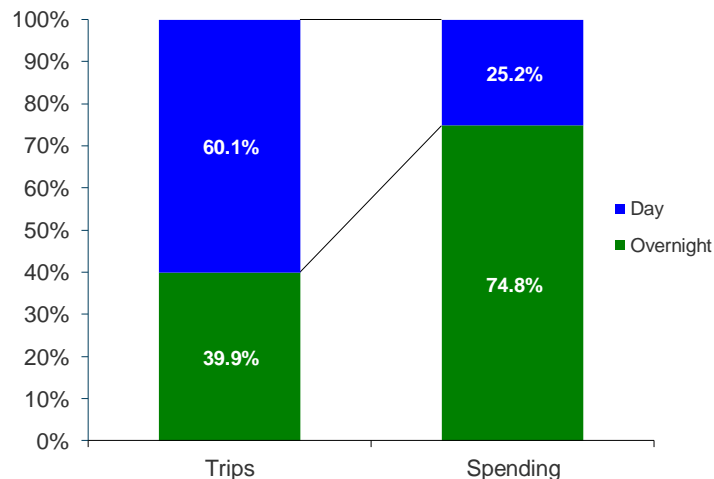
# Overnight and day markets

- Kansas hosted 34.8 million travelers in 2014. The majority of travelers were day travelers (60%).
- While representing only 40% of all trips, overnight traveler spending accounts for nearly 75% of all traveler spending, generating \$4.7 billion.
- On average, overnight travelers spent \$334 in Kansas during their trip.

Trips and Spend	
2014, in millions	
<b>Total Travelers</b>	<b>34.8</b>
Overnight	14.0
Day	20.8
<b>Total Spending</b>	<b>\$6,233</b>
Overnight	\$4,685
Day	\$1,548
<b>Per Traveler Spending</b>	<b>\$179</b>
Overnight	\$334
Day	\$74

**Traveler Spending Breakout**

Share of Total



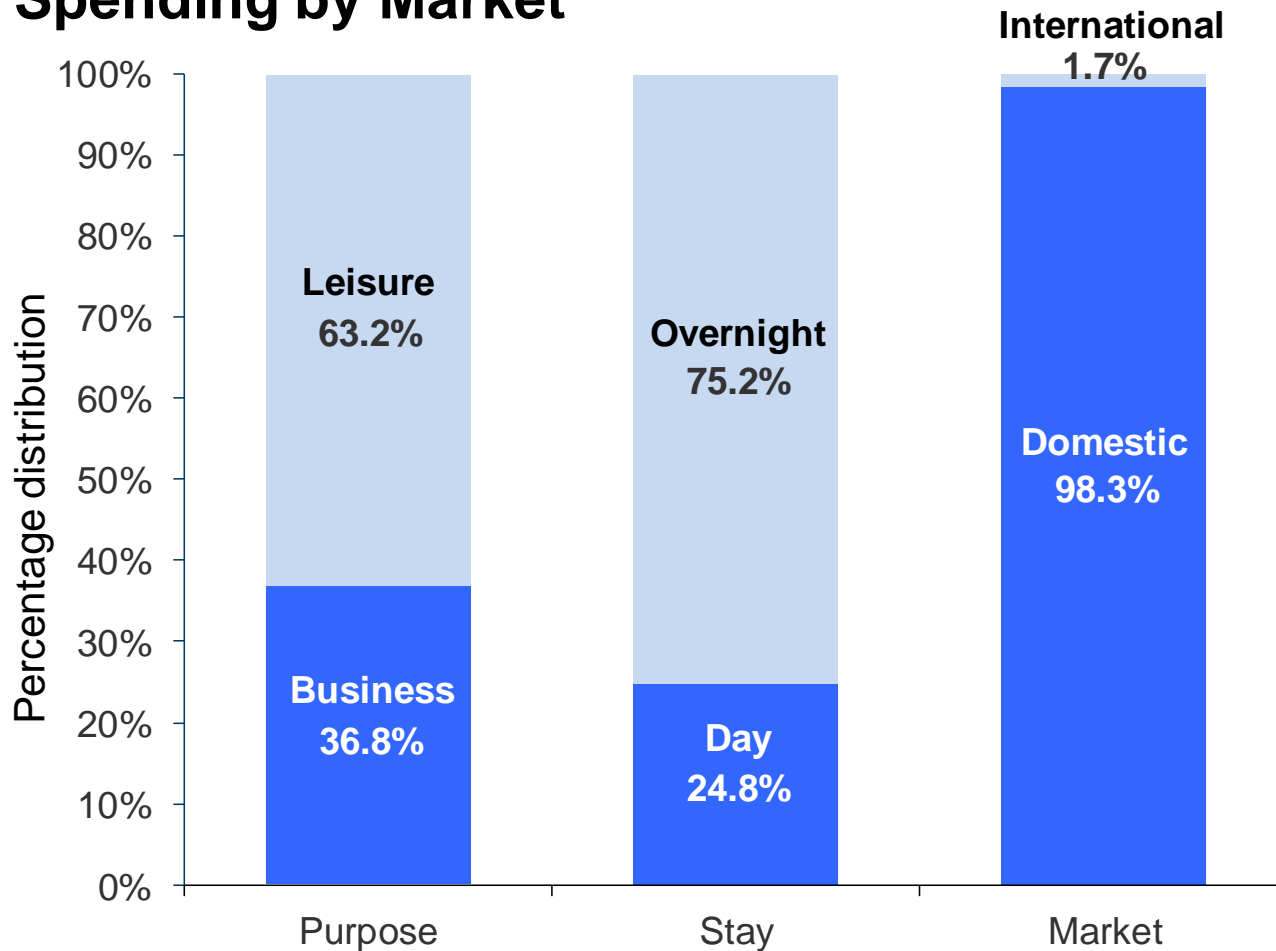
# Traveler spending by market segment

- Business travel accounts for 37% of all traveler spending.
- Day travelers in Kansas spent \$1.5 billion in 2014, 24.8% of the total.
- Domestic travelers represent 98% of all traveler spending.

<b>Traveler Spending in 2014</b>					
<b>(US\$ Billion)</b>					
<b>Purpose</b>		<b>Stay</b>		<b>Market</b>	
<b>Business</b>	<b>\$2.30</b>	<b>Day</b>	<b>\$1.55</b>	<b>Domestic</b>	<b>\$6.13</b>
<b>Leisure</b>	<b>\$3.94</b>	<b>Overnight</b>	<b>\$4.69</b>	<b>Overseas</b>	<b>\$0.10</b>
<b>Total</b>	<b>\$6.23</b>	<b>Total</b>	<b>\$6.23</b>	<b>Total</b>	<b>\$6.23</b>
<b>Share</b>					
<b>Purpose</b>		<b>Stay</b>		<b>Market</b>	
<b>Business</b>	<b>36.8%</b>	<b>Day</b>	<b>24.8%</b>	<b>Domestic</b>	<b>98.3%</b>
<b>Leisure</b>	<b>63.2%</b>	<b>Overnight</b>	<b>75.2%</b>	<b>Overseas</b>	<b>1.7%</b>

# Traveler spending by market segment

## Spending by Market



Sources: DK Shifflet, NTTO, Tourism Economics

# Tourism economy sales

- The Tourism Satellite Account looks at a broader range of tourism-related expenditures, tallying \$6.8 billion.

<b>Tourism Satellite Account</b>						
<b>2013 Spending by Category</b>						
<b>(US\$ Million)</b>						
<b>Domestic Visitor</b>	<b>Resident In-State</b>	<b>International Visitor</b>	<b>Non-Visitor PCE</b>	<b>Gov't Support</b>	<b>CAPEX</b>	<b>Total</b>
<b>\$4,565.8</b>	<b>\$1,563.9</b>	<b>\$103.7</b>	<b>\$20.5</b>	<b>\$38.0</b>	<b>\$474.0</b>	<b>\$6,765.8</b>

- Non-visitor private consumption expenditures (PCE) represent tourism consumer durables such as an RV, boat, or furniture for a vacation home.
- Government support for tourism includes the budgets for destination marketing and other budget items in broad support of tourism.
- Capital investment (CAPEX) includes construction of hotels and attractions, as well as tourism equipment and infrastructure.

# Tourism industry and economy sales

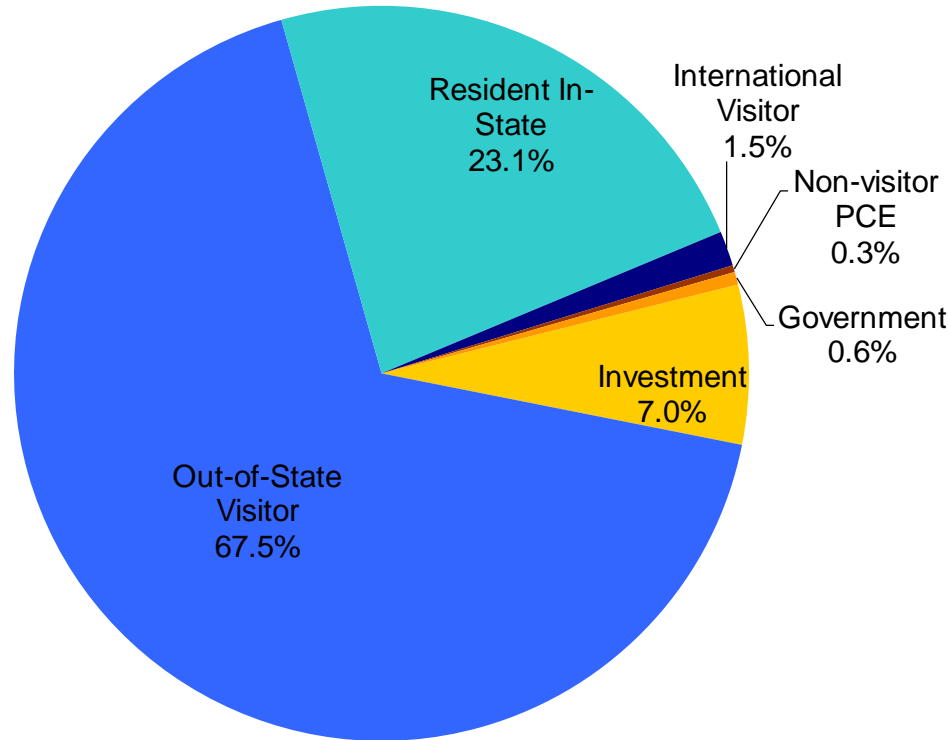
- The direct impact of tourism is driven by tourism industry sales only. This allows for apples-to-apples comparisons with other industries.
- The total economic impact of tourism includes investment in support of tourism, government spending and non-visitor private consumption expenditures (PCE).

<b>Tourism Sales, 2014</b>		
State of Kansas		
	Industry	Economy
Lodging	\$1,006.6	\$1,006.6
Food	\$1,473.9	\$1,473.9
Recreation	\$975.7	\$975.7
Shopping	\$1,003.4	\$1,003.4
Air	\$177.5	\$177.5
Other Transport	\$1,596.3	\$1,596.3
Non-Visitor PCE	\$0.0	\$20.5
Investment	\$0.0	\$474.0
Government	\$0.0	\$38.0
<b>TOTAL</b>	<b>\$6,233.4</b>	<b>\$6,765.8</b>



# Tourism economy sales by source

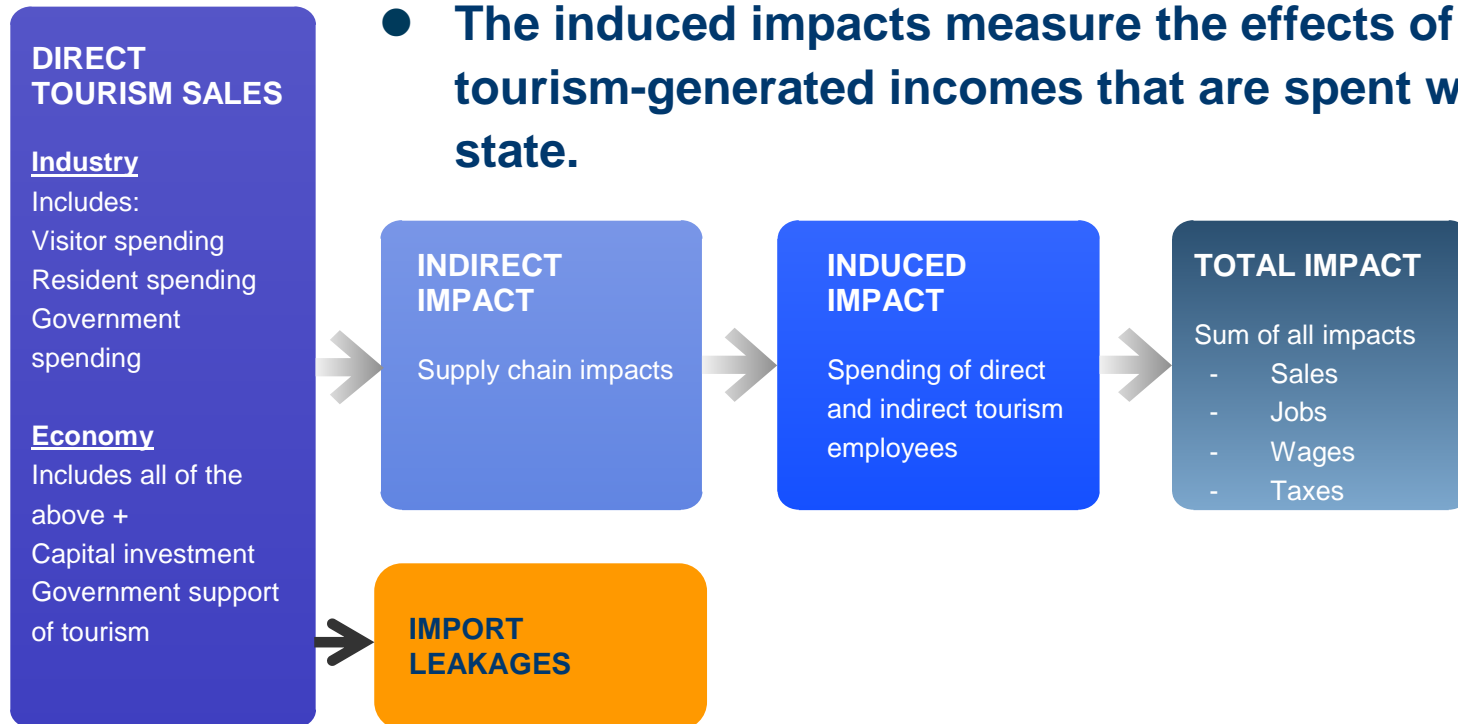
Tourism Demand by Source



- Domestic visitor markets comprise the majority (91%) of tourism sales in Kansas.
- International visitor markets contributed 1.5% of tourism sales last year.
- Capital investment in tourism-related construction and machinery & equipment represents 7.0% of tourism economy sales.

# Translating sales into impact

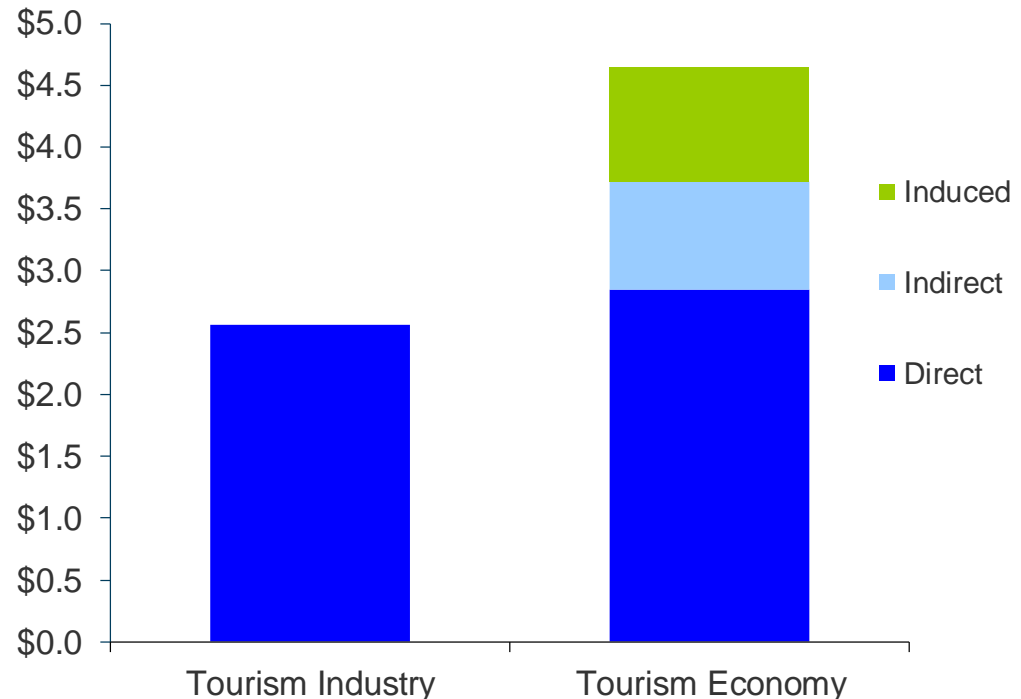
- Direct tourism sales flow through the Kansas economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by tourism sales.
- The induced impacts measure the effects of tourism-generated incomes that are spent within the state.



# Tourism impact summary - GDP

- Tourism industry GDP directly generated \$2.6 billion of Kansas GDP in 2014.
- The tourism economy, including direct, indirect and induced impacts of all tourism sales, generated GDP of \$4.6 billion. This is 3.2% of the state economy.

**Tourism GDP Impact**  
2014, US\$ Billions



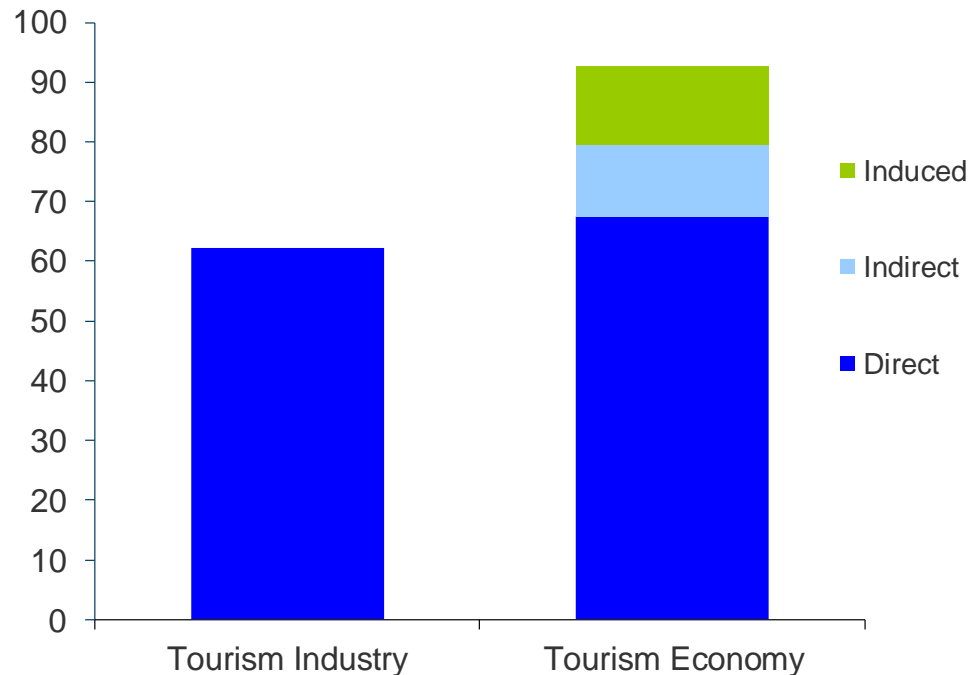
Source: Tourism Economics

# Tourism impact summary - Jobs

- Tourism spending directly supported 62,188 jobs in Kansas in 2014.
- The tourism economy, including direct, indirect and induced impacts, supported 92,698 jobs. This is 4.9% of all jobs in the state.

## Tourism Employment Impact

2014, Thousands



Source: Tourism Economics

# Direct Tourism Industry

*What is the direct economic value of tourism-related sectors?*



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# Tourism industry impacts

<b>Tourism Industry Impacts</b>		
	<b>GDP (Millions)</b>	<b>Jobs (Units)</b>
Agriculture, Fishing, Mining	-	-
Construction and Utilities	-	-
Manufacturing	-	-
Wholesale Trade	-	-
Air Transport	\$57.6	710
Other Transport	\$90.6	3,009
Retail Trade	\$227.6	6,222
Gasoline Stations	\$89.0	1,848
Communications	-	-
Finance, Insurance and Real Estate	\$125.2	1,066
Business Services	\$4.2	51
Education and Health Care	-	-
Recreation and Entertainment	\$326.4	10,993
Lodging	\$795.8	12,201
Food & Beverage	\$679.1	23,394
Personal Services	\$67.2	1,658
Government	103.4	1,038
<b>TOTAL</b>	<b>\$2,566.2</b>	<b>62,188</b>
<b>Growth Rate</b>	<b>4.01%</b>	<b>1.33%</b>

- Tourism GDP is the value added of those sectors directly interacting with travelers.
- The narrow definition of the tourism industry counts only tourism consumption, which excludes capital investment and general government support of tourism. This definition is consistent with economic accounts.
- On this basis, tourism industry GDP was \$2.6 billion in 2014, accounting for 1.7% of total Kansas GDP.

# Why sales and GDP differ

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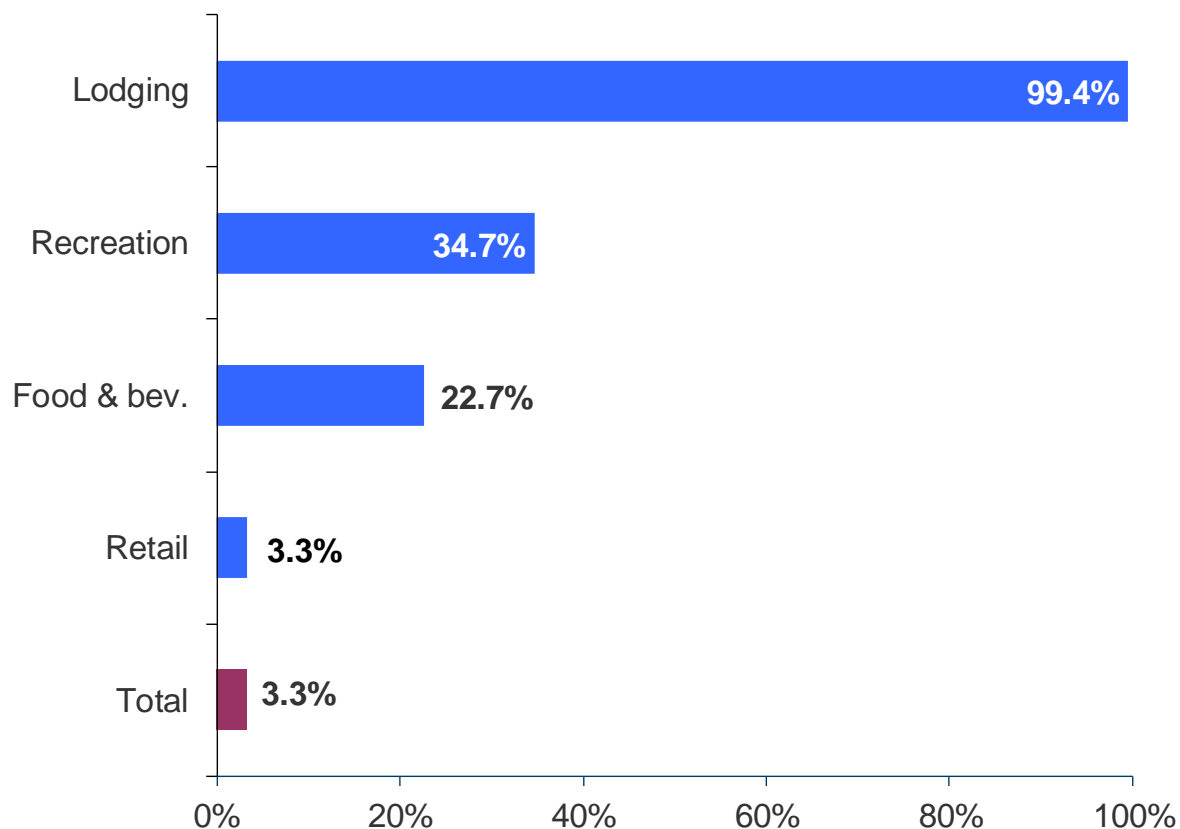
- Tourism industry sales in Kansas \$6.2 billion while GDP measures \$2.6 billion
- GDP (Gross domestic product) is less than sales because it measures only the locally-produced value of goods and services consumed by visitors
  - This includes the local labor, capital depreciation, and the profits of tourism-related companies that are based in Kansas
  - The costs of imported goods (gasoline, food or retail goods) that come from out-of-state are excluded from the GDP calculation
  - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state.

# Travel employment intensity

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- Tourism is a significant part of several industries – 99% of lodging, 35% of recreation, and 22% of food & beverage employment is supported by tourism spending.

## Tourism Employment Intensity by Industry





# Travel employment growth

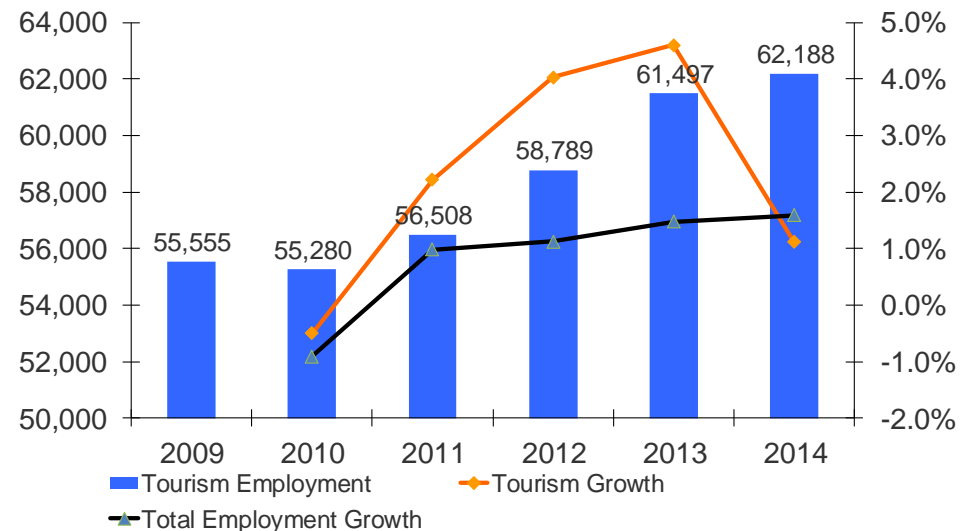
## Tourism Employment

	2009	2010	2011	2012	2013	2014
Tourism Employment	55,555	55,280	56,508	58,789	61,497	62,188
Percent Change		-0.5%	2.2%	4.0%	4.6%	1.1%

- Tourism employment grew 1.3% in 2014, making four straight years of employment growth.

### Tourism Employment

Number of Jobs



Source: Tourism Economics

# Tourism ranking

- Were tourism an industry as defined by the government, tourism employment would rank as the 7<sup>th</sup> largest industry in Kansas.

<b>Employment Ranking</b>		
<b>State of Kansas</b>		
<b>Rank</b>	<b>Industry</b>	<b>Employment</b>
1	Health care and social assistance	168.6
2	Manufacturing	162.8
3	Retail trade	144.1
4	Accommodation and food services	105.5
5	Administrative and waste management services	80.6
6	Professional, scientific, and technical services	66.1
<b>7</b>	<b>Tourism</b>	<b>62.2</b>
8	Finance and insurance	61.8
9	Wholesale trade	60.0
10	Construction	56.7
11	Other services, except public administration	51.5
12	Transportation and warehousing	48.5
13	Information	27.5
14	Educational services	19.2
15	Arts, entertainment, and recreation	15.5

# Total Tourism Economy

*What is the total economic impact of tourism in Kansas?*



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# Travel generated sales

<b>Tourism Sales</b>				
<b>(US\$ Million)</b>				
	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Agriculture, Fishing, Mining	-	21.6	10.0	31.5
Construction and Utilities	467.9	147.6	52.9	668.4
Manufacturing	9.1	139.4	60.3	208.9
Wholesale Trade	-	72.3	86.1	158.3
Air Transport	177.5	1.1	1.4	179.9
Other Transport	211.0	82.5	31.3	324.8
Retail Trade	1,003.4	15.6	136.0	1,155.0
Gasoline Stations	1,184.0	1.2	10.0	1,195.2
Communications	-	149.7	73.6	223.4
Finance, Insurance and Real Estate	216.4	299.5	460.0	975.9
Business Services	7.1	405.0	93.3	505.4
Education and Health Care	-	4.4	301.7	306.1
Recreation and Entertainment	593.9	30.6	19.8	644.2
Lodging	984.9	1.0	1.2	987.1
Food & Beverage	1,474.1	61.5	122.0	1,657.6
Personal Services	105.0	58.5	65.7	229.2
Government	308.4	65.2	29.8	403.4
<b>TOTAL</b>	<b>6,742.8</b>	<b>1,556.5</b>	<b>1,555.0</b>	<b>9,854.3</b>
<b>Growth Rate</b>	<b>4.0%</b>	<b>4.5%</b>	<b>3.9%</b>	<b>4.1%</b>

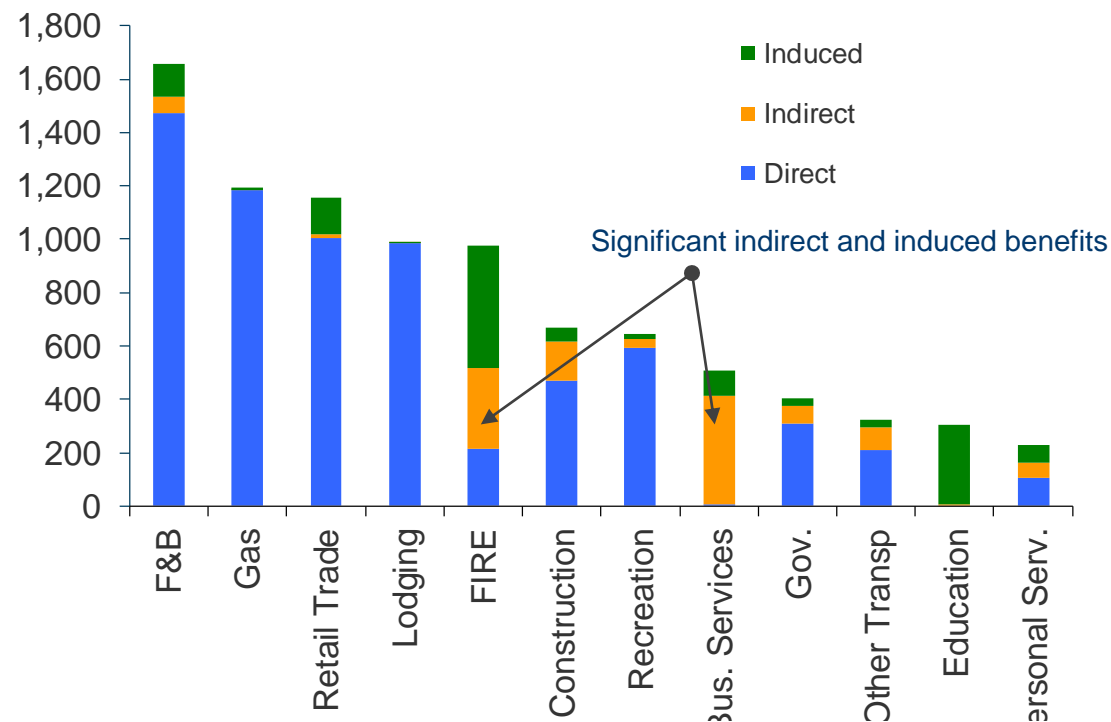
Traveler spending of \$6.7 billion generated a travel generated economic impact of \$9.85 billion in 2014 as traveler dollars flowed through the Kansas economy.

# Travel sales

- All business sectors of the Kansas economy benefit from tourism activity directly and/or indirectly.
- Sectors that serve the tourism industry, like business services, gain as suppliers to a dynamic industry.

## Tourism Sales by Industry

\$ million



# Travel GDP (value added)

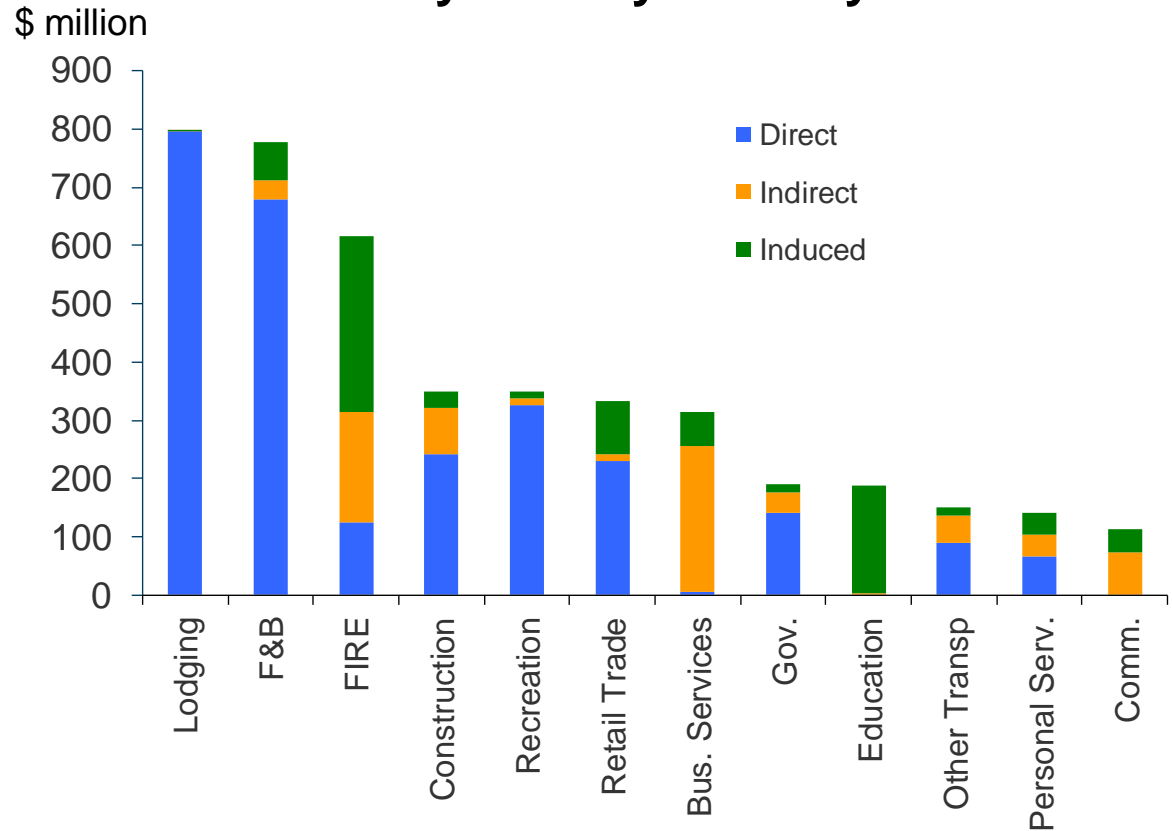
<b>Tourism Economy GDP Impact</b>				
<b>(US\$ Million)</b>				
	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Agriculture, Fishing, Mining	-	6.0	2.7	8.7
Construction and Utilities	240.4	80.1	29.0	349.4
Manufacturing	3.1	46.6	17.3	67.0
Wholesale Trade	-	46.8	55.7	102.5
Air Transport	57.6	0.4	0.5	58.4
Other Transport	90.6	44.6	16.3	151.4
Retail Trade	230.4	10.6	91.3	332.3
Gasoline Stations	89.0	0.8	6.8	96.5
Communications	-	72.9	39.3	112.2
Finance, Insurance and Real Estate	125.2	189.3	300.2	614.7
Business Services	4.2	250.9	58.8	313.9
Education and Health Care	-	2.7	184.7	187.5
Recreation and Entertainment	326.4	11.0	11.2	348.7
Lodging	795.8	0.6	0.6	797.0
Food & Beverage	679.1	32.0	66.8	777.8
Personal Services	67.2	37.5	35.7	140.3
Government	141.2	35.8	13.0	190.0
<b>TOTAL</b>	<b>2,850.3</b>	<b>868.5</b>	<b>929.7</b>	<b>4,648.6</b>
<b>Pch Change</b>	<b>3.9%</b>	<b>3.6%</b>	<b>3.4%</b>	<b>3.8%</b>

Travel generated \$4.6 billion in state GDP in 2014, or 3.2% of the Kansas economy. This excludes all import leakages to arrive at the economic value generated by travel.

# Travel GDP (value added)

- The industry that has the largest economic contribution from traveler spending is the Lodging industry closely followed by F&B (restaurants and bars).

**Tourism Economy GDP by Industry**



# Travel employment

- The tourism sector supported 92,698 jobs in 2014.

<b>Tourism Economy Employment</b>				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	92	40	132
Construction and Utilities	4,487	557	119	5,163
Manufacturing	47	431	127	605
Wholesale Trade	-	339	404	742
Air Transport	710	4	6	720
Other Transport	3,009	742	277	4,028
Retail Trade	6,275	233	2,057	8,564
Gasoline Stations	1,848	17	141	2,005
Communications	-	491	193	684
Finance, Insurance and Real Estate	1,066	1,679	1,344	4,089
Business Services	51	4,375	1,104	5,530
Education and Health Care	-	74	3,381	3,455
Recreation and Entertainment	10,993	720	403	12,116
Lodging	12,199	12	14	12,224
Food & Beverage	23,394	1,076	2,160	26,630
Personal Services	1,658	811	1,224	3,693
Government	1,685	433	198	2,316
<b>TOTAL</b>	<b>67,420</b>	<b>12,085</b>	<b>13,192</b>	<b>92,698</b>
<b>Growth Rate</b>	<b>1.4%</b>	<b>2.0%</b>	<b>1.8%</b>	<b>1.6%</b>

Indirect impacts quantify the supply chain to those industries directly providing goods or services to travelers.

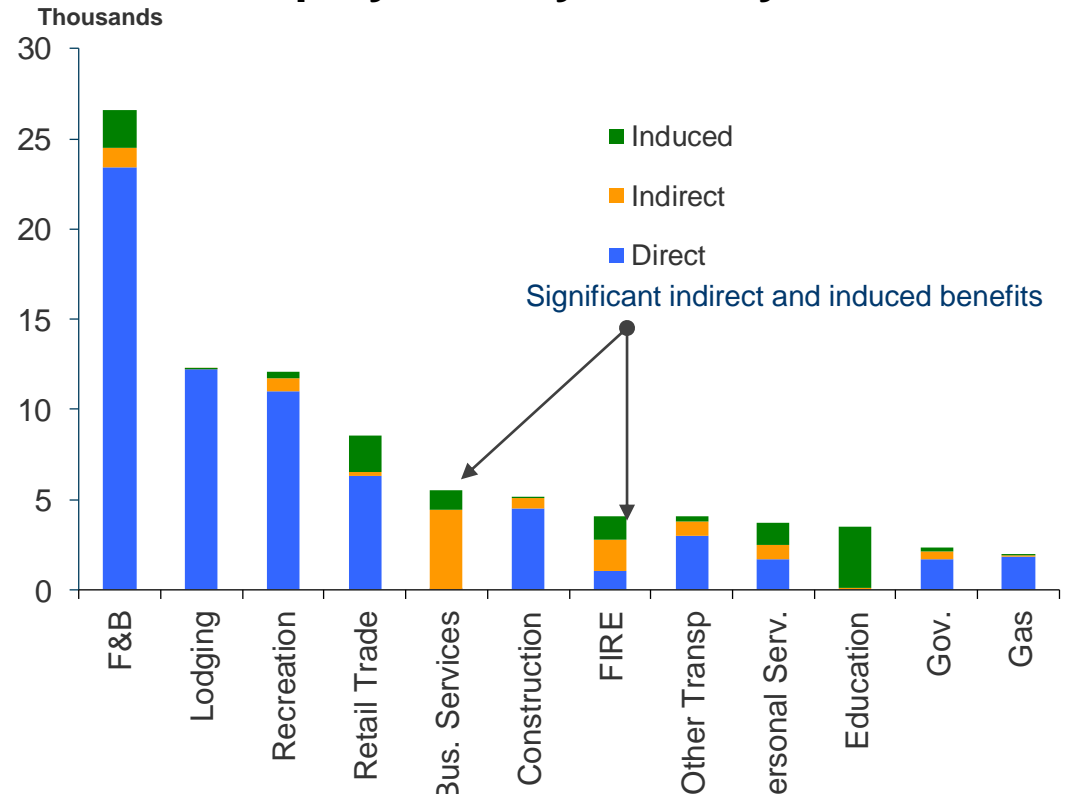
Induced impacts are generated when employees whose incomes are generated either directly or indirectly by travel, spend those incomes in the state economy.



# Travel employment

- Travel is an employment intensive industry directly supporting nearly 23,394 jobs in the food & beverage industry.
- Travel spending supported a total of more than 12,200 jobs in recreation and entertainment.
- Secondary benefits are realized across the entire economy through the supply chain and incomes as they are spent.

## Tourism Employment by Industry



# Travel personal income

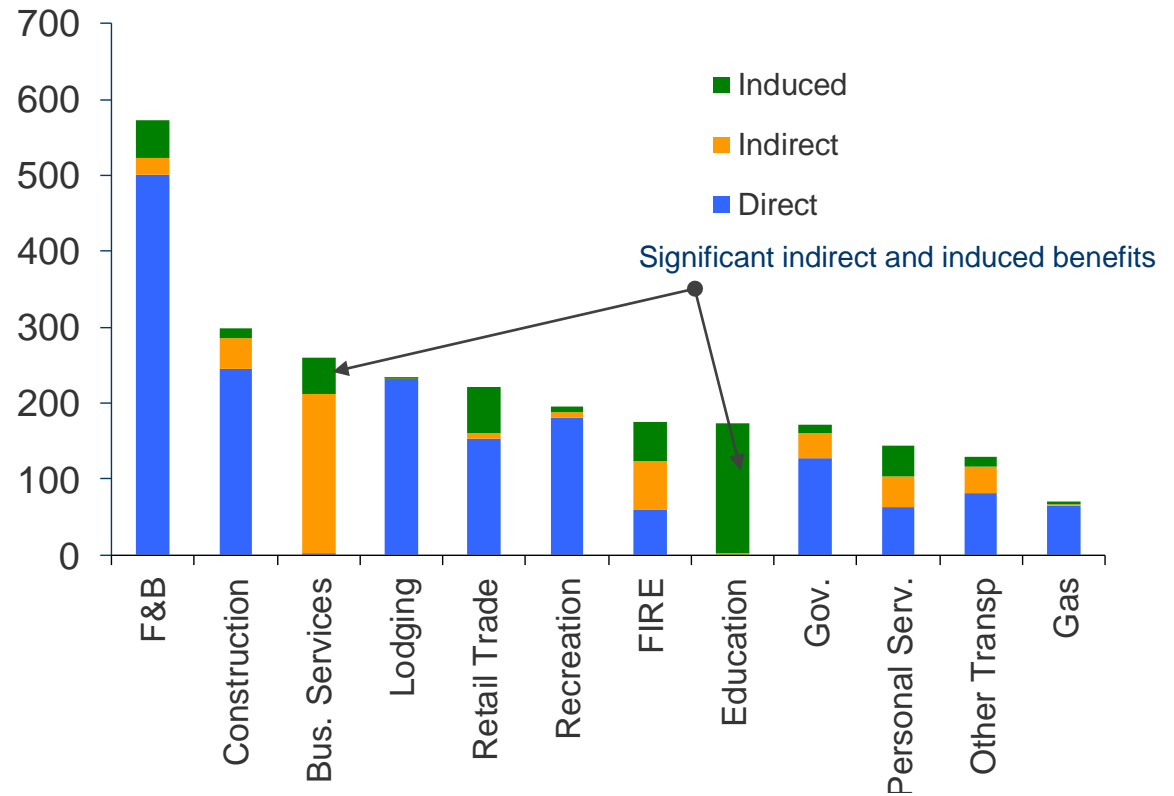
<b>Tourism Labor Income (Compensation)</b>				
<b>(US\$ Million)</b>				
	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Agriculture, Fishing, Mining	-	4.1	2.4	6.6
Construction and Utilities	245.1	40.8	12.1	297.9
Manufacturing	2.3	24.4	7.6	34.3
Wholesale Trade	-	27.1	32.3	59.5
Air Transport	28.8	0.2	0.2	29.2
Other Transport	81.9	34.2	12.8	129.0
Retail Trade	152.4	7.4	62.3	222.1
Gasoline Stations	65.4	0.6	5.0	70.9
Communications	-	31.3	13.8	45.1
Finance, Insurance and Real Estate	59.8	64.6	50.8	175.1
Business Services	2.6	209.1	48.6	260.3
Education and Health Care	-	2.4	171.2	173.6
Recreation and Entertainment	181.8	6.8	6.4	194.9
Lodging	233.0	0.2	0.3	233.6
Food & Beverage	500.5	23.4	49.6	573.4
Personal Services	63.8	39.7	40.7	144.3
Government	127.0	33.2	11.6	171.8
<b>TOTAL</b>	<b>1,744.2</b>	<b>549.6</b>	<b>527.7</b>	<b>2,821.5</b>
<b>Pch Change</b>	<b>3.9%</b>	<b>4.3%</b>	<b>3.5%</b>	<b>3.9%</b>

# Travel personal income

- Significant employment in F&B and recreation drives high labor income in those industries.
- Above average wages support labor income in supplier industries.
- The average labor income of workers directly supported by traveler spending was \$30,900 in 2014.

## Tourism Labor Income by Industry

\$ million



# Travel tax generation

<b>Traveler-Generated Tax Revenues</b>		
<b>(US\$ Million, 2014)</b>		
	<b>Direct</b>	<b>Total</b>
<b>Federal</b>	<b>241.5</b>	<b>403.8</b>
Personal Income	11.3	16.8
Corporate	31.9	68.9
Indirect business	43.8	64.0
Social Security	154.5	254.1
<b>State and Local</b>	<b>396.3</b>	<b>569.3</b>
Sales	162.3	237.4
Bed Taxes	41.4	41.4
Personal Income	34.6	55.9
Corporate	2.8	6.0
Social Security	1.9	3.1
Excise and Fees	25.3	38.2
Property	128.1	187.3
<b>TOTAL</b>	<b>637.8</b>	<b>973.1</b>

- Taxes of \$973 million were directly and indirectly generated by tourism in 2014.
- State and local taxes alone tallied \$570 million in 2014.
- Each household in Kansas would need to be taxed an additional \$511 per year to replace the traveler taxes received by state and local governments.

# Travel tax generation

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- Of the \$570 million in state and local taxes traveler receipts, the state received \$262 million.
- Of the \$262 million in state revenues, \$180 million accrues from sales tax collections.
- Local governments received \$308 million in tax receipts from travel-generated activity.

<b>Traveler-Generated Tax Revenues</b>		
<b>(US\$ Million, 2014)</b>		
	<b>State</b>	<b>Local</b>
<b>Sales</b>	<b>179.8</b>	<b>57.6</b>
<b>Bed Taxes</b>	<b>-</b>	<b>41.4</b>
<b>Personal Income</b>	<b>55.8</b>	<b>0.1</b>
<b>Corporate</b>	<b>6.0</b>	<b>-</b>
<b>Social Security</b>	<b>3.1</b>	<b>-</b>
<b>Excise and Fees</b>	<b>16.9</b>	<b>21.2</b>
<b>Property</b>	<b>-</b>	<b>187.3</b>
<b>TOTAL</b>	<b>261.7</b>	<b>307.7</b>

# The importance of tourism in Kansas in context



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# How important is tourism?

- Kansas' 34.8 million visitors are equivalent to the combined total population of Texas, Nebraska, and Missouri all visiting Kansas in 2014.



# How important is tourism?

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- Visitation rose by more than 1.1 million visitors in 2014. This would be like having the entire population of Dallas as additional visitors to Kansas.





# How important is tourism?

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- Visitors spent more than \$6.2 billion in Kansas in 2014 – equal to total tax revenues collected by the state of Kansas
- \$6.2 billion is equal to what American's are estimated to spend on food for July 4<sup>th</sup>.



# How important is tourism?

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- The 62,188 direct tourism jobs would be nearly enough to hire every man, woman and child living in Shawnee City, Kansas (pop. 64,599)
- The 12,200 jobs at lodging businesses in 2014 is more than twice as large as the undergraduate enrollment at Pittsburg State University



# How important is tourism?

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- The \$569 million in state and local revenues from visitor activity represents \$511 per household in Kansas – or enough for a season pass to Salina's Kenwood Cove water park AND a Scarecrow membership to the Oz Museum in Wamego.



# Methodology and Background



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# Definitions and terms

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- A visitor includes all overnight and day travelers - traveling outside of their usual environment, defined as beyond 50 miles
- The analysis measures the economic impact of travelers to the State of Kansas, including:
  - Day trips and overnight travelers
  - Domestic, Canadian and overseas travelers
  - Leisure and business travel

# Quantifying the travel and tourism economy

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- Most economic sectors such as financial services, insurance, or construction are easily defined within a country's national accounts statistics.
- Travel is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Travel spans nearly a dozen sectors including lodging, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents, and recreation (including museums, theme parks, sports events and others).

# Methods and data sources

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- Domestic traveler expenditure estimates are provided by DK Shifflet's representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics (TE) then adds and cross-checks several categories of spending:
  - Overseas traveler spending (source: OTTI, TE)
  - Canada traveler spending (source: Statistics Canada, TE)
  - Spending on air travel which accrues to KS airports and locally-based airlines
  - Gasoline purchases by travelers (source: TE calculation)
  - Recreational second home expenditures (source: US Census)
  - Smith Travel Research (lodging performance)
  - Local level lodging tax data
  - Sales tax by industry (KS Department of Revenue)
  - Industry-by-industry employment and personal income (Bureau of Economic Analysis and Bureau of Labor Statistics)

# Methods and data sources

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- An IMPLAN model was utilized for the State of Kansas. This traces the flow of traveler-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of travel.
- Tourism Economics then cross-checks these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data. The main definitional difference is that sole-proprietors, which do not require unemployment insurance, are not counted in the ES202 data.



# Description of spending categories

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Spend Category	Description
Lodging	Includes traveler spending in accommodation sector. This includes food and other services provided by hotels and similar establishments.
Recreation	Includes traveler spending within the arts, entertainment and recreation supersector.
Air transport	Includes the local economic activity generated by travelers within the air transport (airline) and support services (on airport) sectors.
Other transport	Includes all forms of local transport services such as taxis, limos, trains, rental cars, and buses.
Shopping	Includes traveler spending within all retail sectors within the Kansas economy.
Service stations	Traveler spending on gasoline. Only the margin counts as local economic impact.
Second homes	Spending associated with the operation of seasonal second homes for recreational use as defined by the Census Department. This is based on an “imputed rent” calculation over an estimated peak season.
Food and beverage	Includes all traveler spending at restaurants and bars.

# Cross section of our clients

## Corporations

Hotel companies  
Aviation manufacturing  
Internet marketing  
Internet distribution  
Financial institutions  
Theme Parks  
Travel trade

## Associations

Caribbean Tourism Org.  
European Travel Commission  
Pacific Asia Travel Assoc.  
US Travel Association  
DMAI  
IAAPA  
WTTC  
UN World Tourism Org.

## Destinations

Tourism Australia  
Bahamas Ministry of Tourism  
Brand USA  
Visit California  
Canadian Tourism Commission  
Dubai Tourism  
Georgia Tourism  
Saudi Arabia (SCT)  
Discover Los Angeles  
NYC & Company  
Ontario Ministry of Tourism  
Visit Orlando  
Philadelphia Tourism Marketing  
San Diego CVB  
Tourism Ireland  
Visit Britain  
Visit Denmark  
Visit Florida  
Visit Switzerland



# About Tourism Economics

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- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 200 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 80 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the US and in the United Nations Project Link.
- For more information: [info@tourismeconomics.com](mailto:info@tourismeconomics.com).



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For more information:

Adam Sacks, President

[adam@tourismeconomics.com](mailto:adam@tourismeconomics.com)

Christopher Pike, Director

[cpike@tourismeconomics.com](mailto:cpike@tourismeconomics.com)