

# ECONOMIC IMPACT OF TOURISM IN KANSAS 2019

Prepared for:  
Kansas Department of Wildlife, Parks and Tourism



[WWW.TOURISMECONOMICS.COM](http://WWW.TOURISMECONOMICS.COM)

# INTRODUCTION

The travel sector is an integral part of the Kansas economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of Kansas's future. Employment supported by visitor activity rose to 97,200 – 5.4% of all employment in the state.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is particularly true for Kansas as it builds upon its tourism economy. By establishing a baseline of economic impacts, the industry can track its progress over time.

To quantify the economic significance of the tourism sector in Kansas, Tourism Economics has prepared a comprehensive model detailing the wide-reaching impacts arising from visitor spending. The results of this study show the scope of the travel sector in terms of direct visitor spending, as well as the total economic impacts, jobs, personal income, and fiscal (tax) impacts in the broader economy.

The analysis draws on the following data sources:

- D.K. Shifflet: survey data, including spending and visitor profile characteristics for visitors to Kansas
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry
- STR: Lodging performance data, including room demand, room rates, occupancy, and room revenue
- US Census: business sales by industry and seasonal second homes inventory
- Kansas Department of Revenue – sales tax data by industry and other data points
- Kansas Gaming Commission – casino information

# KEY FINDINGS

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The visitor economy is an engine for economic growth



## Visitor Spending

In 2019, 36.5 million visitors spent \$7.3 billion in Kansas.



## Growth continues

Visitor spending increased 3.1% in 2019, stronger than the five-year annual average of 2.8%.



## Employment Generator

Employment directly supported by visitor spending increased has increased by 2,800 jobs since 2015.



## Fiscal Contributions

Visitors generated \$671 million in state and local taxes, which is equivalent to \$600 in tax savings for every household in Kansas.

# VISITATION AND SPENDING

# VISITOR SPENDING TRENDS

Continued growth in 2019

## Growth in visitation and spending

Kansas tourism indicators accelerated in 2019. Visitation growth was led by both day and overnight leisure visitors, the latter of which was supported by a surge in room demand. Visitation growth supported overall spending growth in the state.



## Visitation increased by 1 million visitors in 2019

This represents both the largest increase and strongest growth in visitation since 2013



## Visitor spending growth continued in 2019

Visitor spending growth increased 3.1% in 2019 to reach \$7.3 billion.



## Increases in food and lodging spending supported overall growth

Visitor spending on food & beverages increased by 4.7% in 2019, leading all categories.

# VISITATION

## Total visitor count

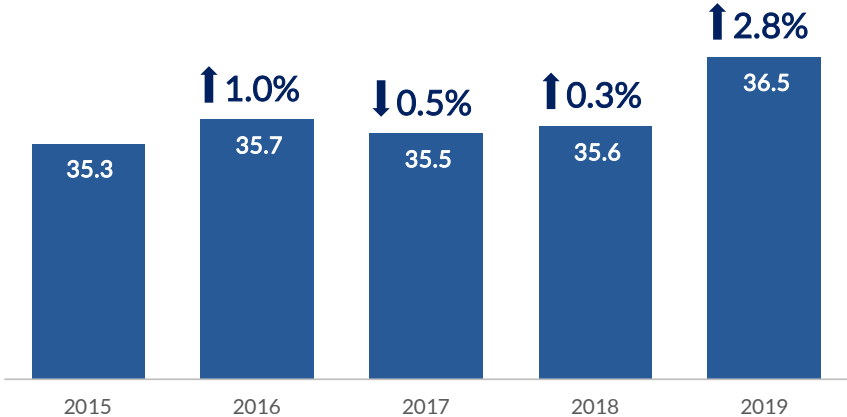
Visitation growth surged 2.8% in 2019, the fastest in the last five years. In 2019, Kansas welcomed 36.5 million visitors.

Visitation has increased by 1.2 million person-trips since 2015 with 80% of that growth occurring in 2019.

A 2.3% increase in room demand helped support overnight visitation, while lower gas prices and a healthy economy in 2019 helped push day visitation higher. Both day and overnight visitation growth supported overall visitation growth.

Visitation growth was supported by growth in several seasons. After struggling in 2018, the key summer season had strong room demand, led by 7.9% growth in June. Building off strong growth in 2018, the fall season continued to grow; October registered room demand growth of nearly 4%.

Kansas visitation levels (millions)



Source: DK Shifflet, Tourism Economics

# SPENDING

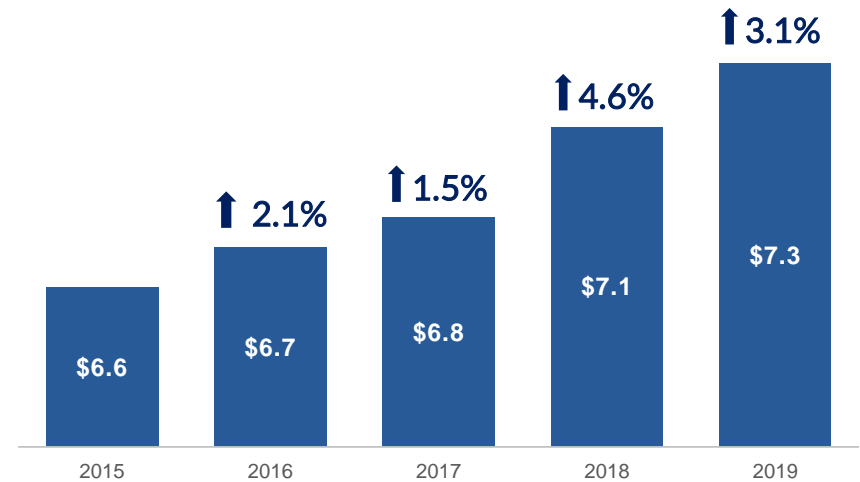
## Total visitor spending

Visitor spending in Kansas grew 3.1% in 2019 to reach \$7.3 billion.

Visitor spending increased by \$220 million in 2019 and has grown by \$775 million since 2015, an overall increase of 12.6%.

With gas prices falling and minimal price pressures from other key spending categories, the spending increase was largely driven by visitation growth.

Kansas visitor spending (\$ billions)



Source: DK Shifflet, Tourism Economics



# SPENDING

## Spending by category - 2019

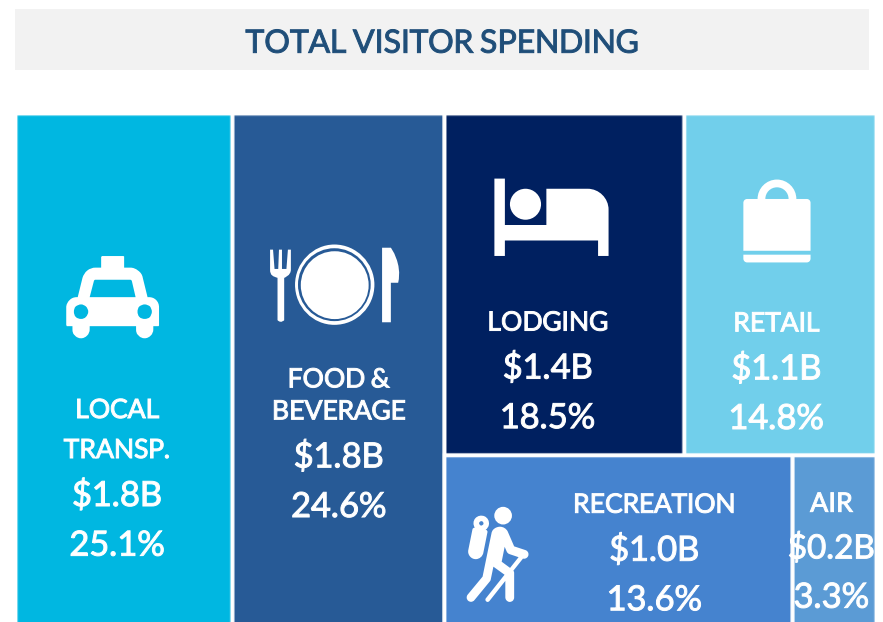
The \$7.3 billion spent by visitors to Kansas was spread across a wide range of sectors

Of the \$7.3 billion spent in Kansas in 2019 by visitors, a quarter was spent on transportation in the state. Food & beverage spending captures \$1.8 billion - 24.6% of the average visitor dollar.

Visitors spent 18.5% on lodging, which includes both room rentals as well as 2<sup>nd</sup> home rental income.

About 15 cents of each visitor dollar went to retail shopping while in the state.

The \$1.0 billion in the state spent at recreational businesses is 13.6% of each visitor dollar.



Source: DK Shifflet, Tourism Economics

# SPENDING

## Visitor spending timeline

Visitor spending has increased by \$775 million since 2015.

Visitor spending growth on food and beverages supported overall spending growth. Lodging spending growth in 2019 also helped bring up the annual results, while lower growth in shopping by visitors capped growth.

Visitor spending on food & beverages has grown by \$250 million since 2015, the largest increase by any category.

While 2019s growth in recreational spending by visitors was slightly lower than overall spending growth, recreational spending has supported overall visitor spending growth over the past five years, increasing by 4.4% annually.

### Visitor Spending in Kansas, 2015-2019

Amounts in millions of dollars

	2015	2016	2017	2018	2019	2019 Growth	2015-2019 CAGR
<b>Total visitor spending</b>	<b>\$6,550</b>	<b>\$6,691</b>	<b>\$6,794</b>	<b>\$7,107</b>	<b>\$7,327</b>	<b>3.1%</b>	<b>2.8%</b>
 Lodging*	\$1,061	\$1,090	\$1,100	\$1,122	\$1,163	3.6%	2.3%
 Food & beverages	\$1,555	\$1,606	\$1,657	\$1,723	\$1,804	4.7%	3.8%
 Retail	\$1,049	\$1,062	\$1,028	\$1,076	\$1,086	0.9%	0.9%
 Recreation	\$1,003	\$1,035	\$1,085	\$1,164	\$1,192	2.4%	4.4%
 Transportation**	\$1,883	\$1,898	\$1,924	\$2,022	\$2,082	2.9%	2.5%

\* Lodging includes 2nd home spending

\*\* Transportation includes both ground and air transportation

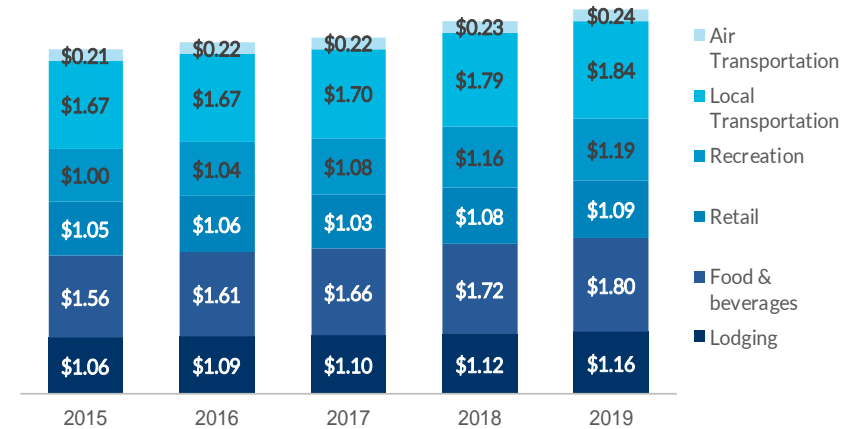
# SPENDING

## Spending by category

Visitor spending on recreational activities reached \$1.2 billion in 2019 and has grown by 20% since 2015, an increase of \$190 million.

Food & beverage spending has increased by \$250 million since 2015; 60% of this growth has occurred in just the last year.

Kansas visitor spending (\$ millions)



Source: Tourism Economics

# SPENDING

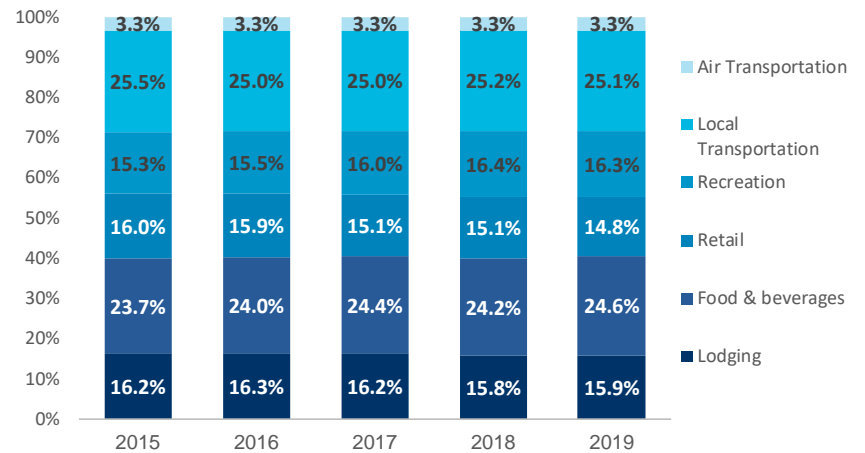
## Visitor spending shares

With the strong increases in spending on recreational activities over the last few years, the share of the visitor dollar spent at amusement and entertainment businesses has risen from 15.3% to 16.3% in 2019.

The share of the visitor dollar spent on lodging rose slightly in 2019, registering 15.9%.

The share of the visitor dollar spent on food & beverages is another category that has increased in importance as measured by its spending share, reaching 24.6% in 2019.

Kansas visitor spending (shares)



Source: Tourism Economics

# VISITATION AND SPENDING

## Day/overnight splits

Each traveler spends \$200 on their trip to Kansas.

36.5 million overnight person trips spent \$7.3 billion in visitor spending to Kansas.

Day visitation grew to 21.6 million person trips, with spending increasing to \$1.7 billion in 2019.

Overnight visitors comprise about 40% of all visitors but spend about 77% of all visitor spending.

Spending increases were seen from the overnight visitors as per-traveler spending of overnight visitors rose \$10 to \$378 in 2019.

### Trips and spending, 2015-2019

Amounts in nominal dollars and number of visitors

	2015	2016	2017	2018	2019
<b>Total visitors (millions)</b>	<b>35.3</b>	<b>35.7</b>	<b>35.5</b>	<b>35.6</b>	<b>36.5</b>
Day	21.3	21.5	21.1	21.0	21.6
Overnight	14.0	14.2	14.4	14.5	14.9
<b>Total traveler spending (millions)</b>	<b>\$6,550</b>	<b>\$6,691</b>	<b>\$6,794</b>	<b>\$7,107</b>	<b>\$7,327</b>
Day	\$1,651	\$1,667	\$1,684	\$1,747	\$1,695
Overnight	\$4,899	\$5,024	\$5,110	\$5,360	\$5,632
<b>Per traveler spending</b>	<b>\$185</b>	<b>\$188</b>	<b>\$192</b>	<b>\$200</b>	<b>\$200</b>
Day	\$77	\$77	\$80	\$83	\$78
Overnight	\$350	\$355	\$355	\$368	\$378

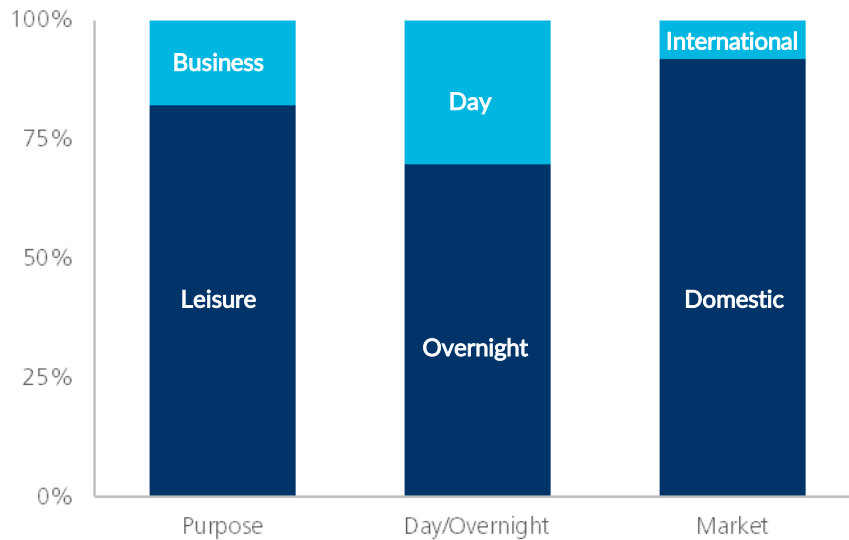
Source: Tourism Economics

# SPENDING

## Visitor spending by market

### Spending share by market, 2019

Expressed as a percentage of total expenditure per market



Source: Tourism Economics

### Kansas spending by market

Amounts in millions of nominal dollars and percent of total

	Spending	% of total
<b>Purpose</b>	\$7,327	
Leisure	\$4,643	63%
Business	\$2,684	37%
<b>Stay</b>	\$7,327	
Day	\$1,695	23%
Overnight	\$5,632	77%
<b>Market</b>	\$7,327	
Domestic	\$7,079	97%
International	\$248	3%

Source: Tourism Economics

# TOURISM ECONOMY

# TOURISM SATELLITE ACCOUNT

## Investment

**\$613 million** was spent on construction costs in support of the tourism industry in Kansas.

Spending on machinery & equipment reached \$364 million in 2019, an increase of 3.2%.

New construction rebounded in 2019, climbing back to \$250 million. New construction spending grew 40% in 2019 after having fallen 30% in 2018.

### Tourism capital investment, 2015-2019

Amounts in nominal dollars and number of visitors

	2015	2016	2017	2018	2019	2019 Growth	2015-2019 CAGR
Construction	\$181	\$260	\$250	\$178	\$249	40.3%	8.4%
Machinery & Equipment	\$325	\$331	\$337	\$353	\$364	3.2%	2.9%
<b>Total</b>	<b>\$506</b>	<b>\$591</b>	<b>\$587</b>	<b>\$530</b>	<b>\$613</b>	<b>15.7%</b>	<b>4.9%</b>

Source: Dodge Construction; Tourism Economics



# TOURISM SATELLITE ACCOUNT

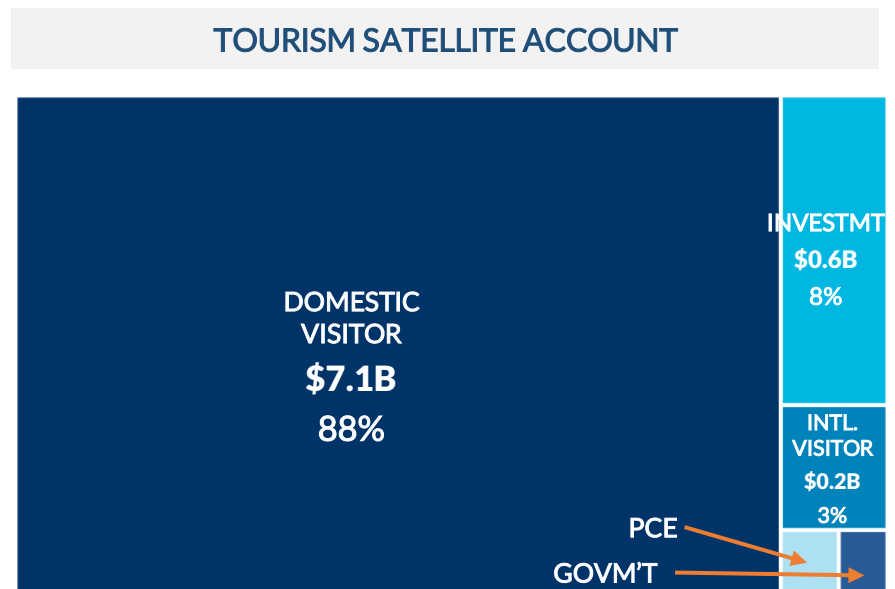
Category contributions - 2019

Visitors to Kansas supported a total of \$8.1 billion in expenditures in 2019

Domestic visitors provided the majority of tourism economy spending at \$7.1 billion, 88% of the total.

Investment spending added 8%. International visitors and their \$250 million in spending were 3% of the total.

Personal consumption spending in support of tourism and governmental support were \$69 million and \$58 million respectively in 2019, 1.6% of the total.



Source: Tourism Economics

# TOURISM SATELLITE ACCOUNT

## Tourism economy in Kansas

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 economy spending, 2015-2019

Amounts in nominal dollars

	2015	2016	2017	2018	2019	2019 Growth	2015-2019 CAGR
Domestic Visitor	\$6,346	\$6,451	\$6,559	\$6,868	\$7,079	3.1%	2.8%
International Visitor	\$204	\$240	\$235	\$239	\$248	3.7%	4.9%
Non-Visitor PCE	\$44	\$59	\$63	\$67	\$69	3.0%	11.9%
Gov't Support	\$49	\$55	\$55	\$56	\$58	3.9%	4.4%
Investment	\$506	\$591	\$587	\$530	\$613	15.7%	4.9%
Total	\$7,149	\$7,395	\$7,499	\$7,760	\$8,067	4.0%	3.1%

Source: Tourism Economics

# DIRECT IMPACTS

# TOURISM INDUSTRY IMPACTS

The tourism industry consists of visitor spending and its direct impacts on the state economy.

Tourism GDP is the value added of those sectors directly interacting with travelers.

The narrow definition of the tourism industry counts only tourism industry sales, which excludes capital investment and general government support of tourism. This definition is consistent with economic accounts.

On this basis, tourism industry GDP tallied \$3.0 billion in 2019, and tourism industry employment reached 66,007, 3.4% of all Kansas employment.

## Core tourism

Amounts in number of jobs and millions of nominal dollars

	Employment	GDP (millions)
<b>Total</b>	<b>66,007</b>	<b>\$3,039</b>
Food & Beverage	25,104	\$805
Lodging	12,900	\$860
Recreation and Entertainment	11,386	\$500
Retail Trade	6,133	\$259
Other Transport	3,677	\$88
Gasoline Stations	1,893	\$115
Personal Services	1,796	\$79
Finance, Insurance and Real Estate	1,133	\$151
Government	1,044	\$117
Air Transport	884	\$58
Business Services	57	\$6

Source: Tourism Economics

# DIRECT TOURISM INDUSTRY

## Tourism employment growth

### Visitor spending directly supported 66,007 jobs

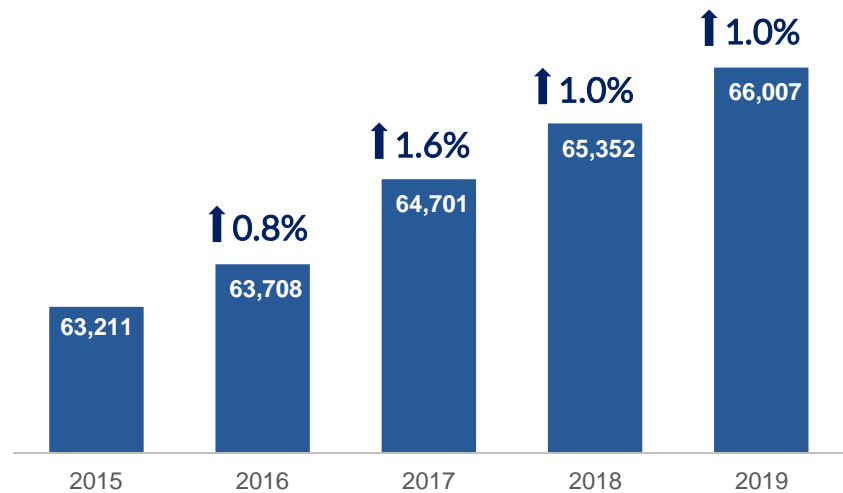
The number of jobs directly supported by tourism increased by 655 jobs, growth of 1.0%.

Direct tourism employment has grown by over 2,800 jobs since 2015.

These 66,000 jobs represent 3.4% of all jobs in Kansas. One out of every 30 jobs is directly supported by visitor spending.

### Tourism supported employment in Kansas

Amounts in number of jobs and year-on-year percentage growth



Source: Tourism Economics

# DIRECT TOURISM INDUSTRY

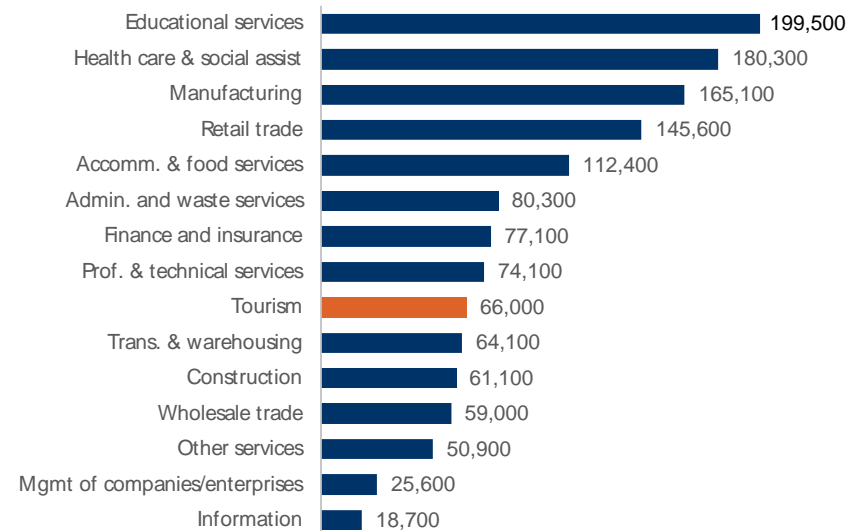
## Tourism employment

In 2019, tourism was the 9th largest employer in Kansas

Visitor activity directly supported 66,000 jobs in Kansas in 2019. Comparing this with the direct employment in other industry sectors, tourism would rank as the 9<sup>th</sup> largest industry.

### Employment in Kansas, by major industry

Amounts in number of jobs



Source: Tourism Economics, BEA

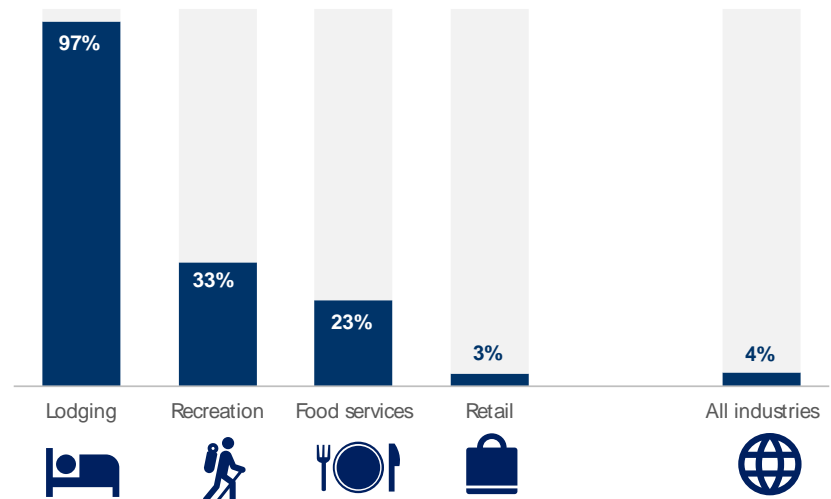
# DIRECT TOURISM INDUSTRY

## Tourism employment intensity

Tourism employment is a significant part of several industries - the majority of lodging employment, 33% of recreation, and 23% of food & beverage employment is supported by tourism spending.

### Tourism employment intensity

Amounts in percentage of total industry employment



# ECONOMIC IMPACTS





## ECONOMIC IMPACTS

How visitor spending generates employment and income

Our analysis of tourism's impact on Kansas begins with actual spending by visitors, but also considers the downstream effects of this injection of spending into the local economy. To determine the total economic impact of tourism in Kansas, we input visitor spending into a model of the Kansas economy created in IMPLAN. This model calculates three distinct types of impact: direct, indirect, and induced.

The impacts on business sales, jobs, wages, and taxes are calculated for all three levels of impact.

- 1. Direct Impacts:** Visitors create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP within each sector.
- 2. Indirect Impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.
- 3. Induced Impacts:** Lastly, the induced impact is generated when employees whose wages are generated wither directly or indirectly by visitors, spend those wages in the local economy.

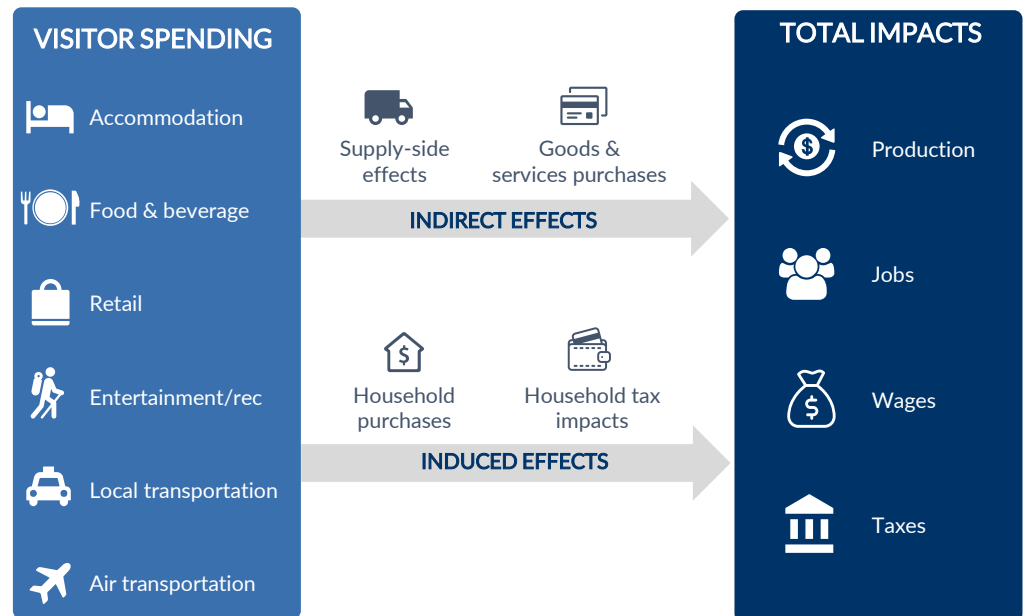
# ECONOMIC IMPACTS

How visitor spending generates employment and income

## Economic impact flowchart

IMPLAN calculates these three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

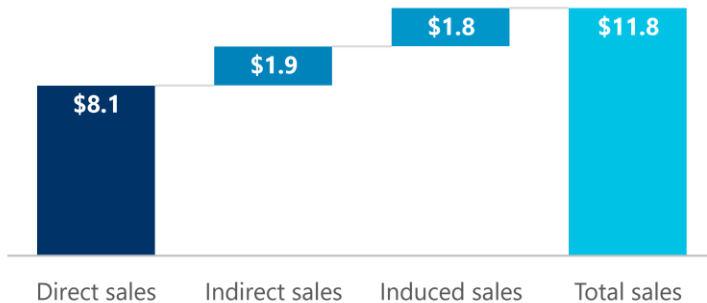


# ECONOMIC IMPACTS

## Business sales by industry

Spending in support of visitor activity reached \$8.1 billion in Kansas in 2019. This supported a total of \$11.8 billion in business sales when indirect and induced impacts are considered.

Summary economic impacts (\$ billions)



## Business sales impacts by industry

Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
<b>Total, all industries</b>	<b>\$8,067</b>	<b>\$1,859</b>	<b>\$1,827</b>	<b>\$11,753</b>
<b>By industry</b>				
Food & Beverage	\$1,804	\$79	\$154	\$2,037
Gasoline Stations	\$1,400	\$2	\$13	\$1,415
Retail Trade	\$1,086	\$18	\$149	\$1,253
Finance, Insurance and Real Estate	\$236	\$382	\$582	\$1,199
Lodging	\$1,138	\$1	\$1	\$1,140
Recreation and Entertainment	\$835	\$44	\$28	\$907
Construction and Utilities	\$613	\$141	\$50	\$804
Business Services	\$8	\$534	\$115	\$658
Other Transport	\$264	\$127	\$48	\$439
Government	\$305	\$66	\$30	\$401
Education and Health Care		\$5	\$340	\$344
Personal Services	\$111	\$67	\$75	\$252
Manufacturing	\$28	\$151	\$65	\$244
Air Transport	\$240	\$1	\$2	\$244
Communications		\$131	\$65	\$196
Wholesale Trade		\$79	\$94	\$173
Agriculture, Fishing, Mining		\$32	\$15	\$46

Source: IMPLAN, Tourism Economics

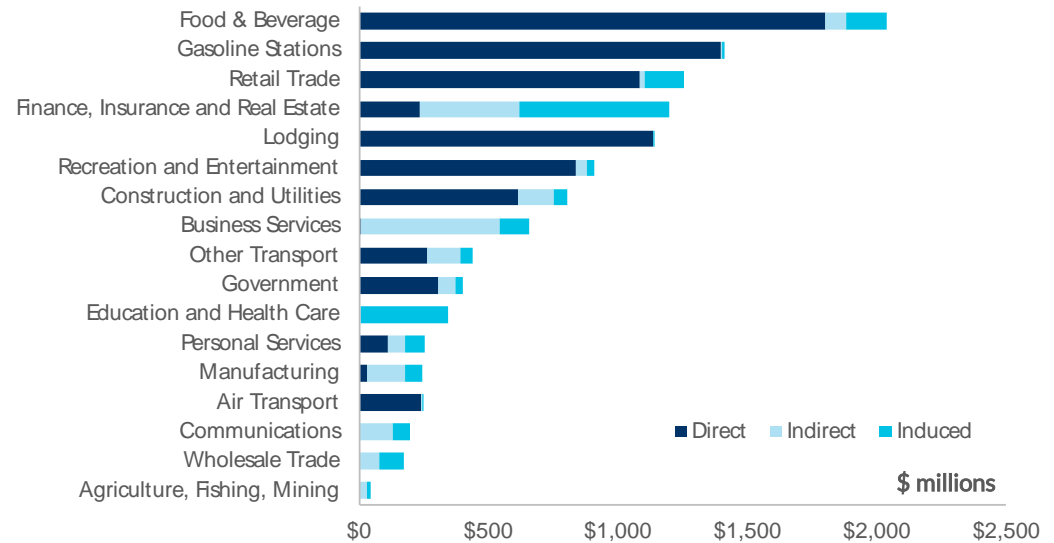
# ECONOMIC IMPACTS

## Business sales by industry

While the majority of sales are in industries directly serving visitors, \$530 million in business services industry sales is happening as a result of selling to tourism businesses.

Significant benefits also accrue in sectors like finance, insurance, and real estate (FIRE), manufacturing and communications from selling to tourism businesses and employees.

## Business sales impacts by industry



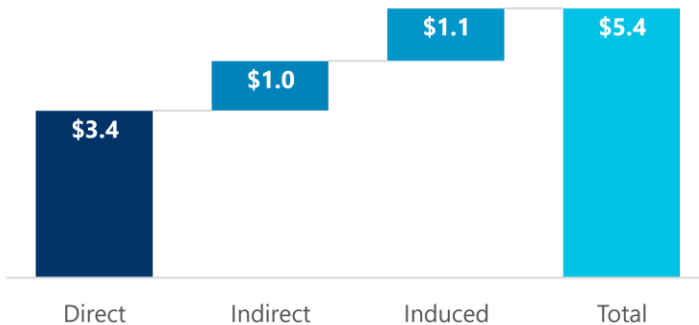
Source: IMPLAN, Tourism Economics

# ECONOMIC IMPACTS

## GDP

Tourism generated \$5.4 billion in local GDP in 2019, or 2.9% of the Kansas economy. This excludes all import leakages to arrive at the economic value generated by traveler activity in the state.

Summary GDP impacts (\$ billions)



## GDP impacts by industry

Amounts in millions of current dollars	Direct value	Indirect value	Induced value	Total value
<b>Total, all industries</b>	<b>\$3,369</b>	<b>\$1,003</b>	<b>\$1,067</b>	<b>\$5,438</b>
<b>By industry</b>				
Food & Beverage	\$805	\$33	\$78	\$915
Lodging	\$860	\$1	\$1	\$861
FIRE*	\$151	\$253	\$358	\$763
Recreation and Entertainment	\$500	\$12	\$13	\$525
Construction and Utilities	\$275	\$82	\$32	\$389
Business Services	\$6	\$304	\$78	\$387
Retail Trade	\$259	\$20	\$101	\$380
Government	\$165	\$39	\$15	\$219
Education and Health Care		\$3	\$202	\$205
Other Transport	\$88	\$56	\$20	\$163
Personal Services	\$79	\$35	\$46	\$161
Gasoline Stations	\$115	\$2	\$7	\$124
Wholesale Trade		\$55	\$57	\$113
Communications		\$53	\$39	\$92
Manufacturing	\$6	\$53	\$19	\$78
Air Transport	\$58	\$0	\$0	\$59
Agriculture, Fishing, Mining		\$3	\$1	\$4

Source: IMPLAN, Tourism Economics

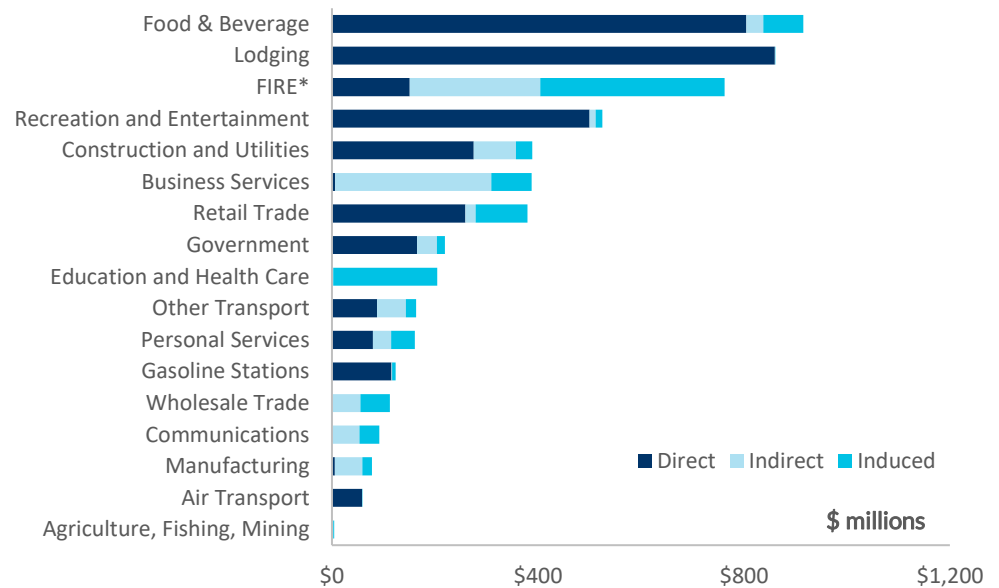
# ECONOMIC IMPACTS

## GDP

In Kansas, the food & beverages industry has the largest local value created by visitor activity.

Lodging, as well as finance, insurance, and real estate follow as industries providing value to Kansas from visitor activity. Ranking 4<sup>th</sup> is the recreational industry followed by business services. This industry significantly benefits from indirect and induced activity that is supported by visitor activity.

GDP impacts by industry



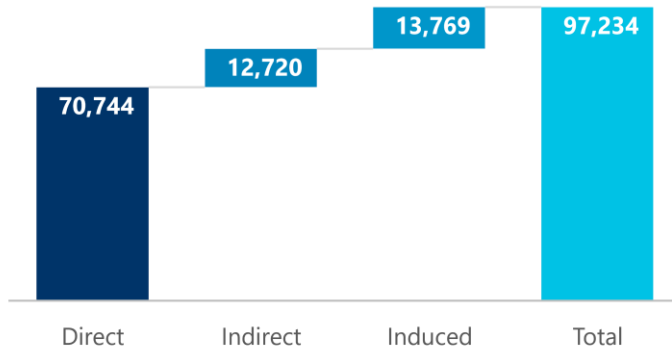
Source: IMPLAN, Tourism Economics

# ECONOMIC IMPACTS

## Employment

Tourism supported a total of 97,234 jobs when indirect and induced impacts are considered. This represents 5.0% of all jobs in the state – or one out of every 20 jobs in Kansas.

Summary employment impacts (number of jobs)



## Employment Impacts

Amounts in total employment	Direct jobs	Indirect jobs	Induced jobs	Total jobs
<b>Total, all industries</b>	<b>70,744</b>	<b>12,720</b>	<b>13,769</b>	<b>97,234</b>
<b>By industry</b>				
Food & Beverage	25,104	1,099	2,171	28,373
Lodging	12,900	12	14	12,927
Recreation and Entertainment	11,386	764	432	12,582
Retail Trade	6,141	247	2,037	8,425
Business Services	57	4,512	1,137	5,706
Other Transport	3,677	920	346	4,944
FIRE*	1,133	1,943	1,537	4,614
Construction and Utilities	3,938	541	126	4,605
Personal Services	1,796	860	1,335	3,991
Education and Health Care		78	3,553	3,630
Government	1,641	433	201	2,275
Gasoline Stations	1,893	19	143	2,055
Air Transport	884	6	8	897
Manufacturing	193	436	129	759
Wholesale Trade		337	400	737
Communications		442	174	616
Agriculture, Fishing, Mining		69	27	96

Source: IMPLAN, Tourism Economics

# ECONOMIC IMPACTS

## Employment

Visitor spending supports the largest number of jobs in the food & beverage industry in Kansas – 28,400. The majority of those jobs are directly supported by visitor activity.

Another 12,500 to 13,000 jobs in each of the recreation and lodging industries are supported by visitor spending.

Over 12,700 Kansas-based jobs are indirectly supported by visitor activity.

### Employment Impacts



Source: IMPLAN, Tourism Economics

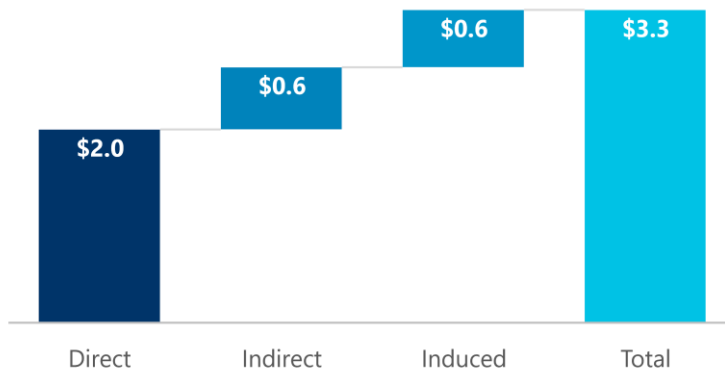


# ECONOMIC IMPACTS

## Personal income

Tourism generated \$2.0 billion in direct income and \$3.3 billion when indirect and induced impacts are considered.

Summary personal income impacts (\$ billions)



## Personal income impacts

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
<b>Total, all industries</b>	<b>\$2,018</b>	<b>\$650</b>	<b>\$596</b>	<b>\$3,264</b>
<b>By industry</b>				
Food & Beverage	\$608	\$28	\$51	\$687
Business Services	\$5	\$268	\$57	\$329
Lodging	\$303	\$0	\$0	\$303
Construction and Utilities	\$209	\$27	\$13	\$249
Recreation and Entertainment	\$225	\$8	\$8	\$241
Retail Trade	\$155	\$8	\$69	\$232
Finance, Insurance and Real Estate	\$59	\$76	\$61	\$196
Education and Health Care		\$3	\$188	\$191
Other Transport	\$112	\$56	\$21	\$189
Government	\$138	\$36	\$13	\$187
Personal Services	\$78	\$48	\$50	\$176
Gasoline Stations	\$84	\$1	\$6	\$91
Wholesale Trade		\$29	\$35	\$63
Manufacturing	\$7	\$28	\$9	\$44
Communications		\$27	\$12	\$39
Air Transport	\$34	\$0	\$0	\$35
Agriculture, Fishing, Mining		\$6	\$4	\$10

Source: IMPLAN, Tourism Economics

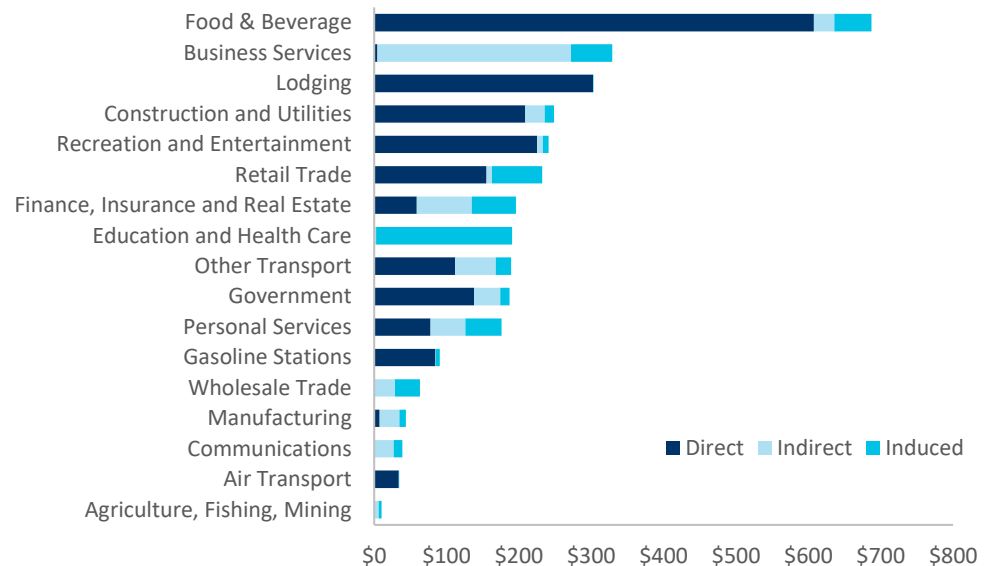
# ECONOMIC IMPACTS

## Personal income

There are eleven industries in which visitor activity supports more than \$150 million in personal income. These range from the obvious—food & beverages and lodging, to the less obvious—business services and education & health care.

Despite ranking a distant fifth in terms of jobs supported, the higher wages in the business services industries supported by visitor activity provide \$330 million in income to Kansas job holders, the second largest impact.

### Personal income impacts



Source: IMPLAN, Tourism Economics

\$ millions

# ECONOMIC IMPACTS

## Fiscal (tax)

Visitor spending, visitor supported jobs, and business sales generated \$1.1 billion in governmental revenues.

State and local taxes alone tallied \$671 million in 2019.

Each household in Kansas would need to be taxed an additional \$600 per year to replace the traveler taxes received by state and local governments.

## Tax impacts

Amounts in millions of current dollars

	2015	2016	2017	2018	2019
<b>Total</b>	<b>\$1,011</b>	<b>\$1,046</b>	<b>\$1,063</b>	<b>\$1,093</b>	<b>\$1,136</b>
<b>Federal</b>					
Personal Income	\$17.5	\$18.1	\$18.4	\$18.8	\$19.2
Corporate	\$72.4	\$75.1	\$76.8	\$78.9	\$80.6
Indirect business	\$67.3	\$69.8	\$71.3	\$73.3	\$74.8
Social insurance	\$264.2	\$273.7	\$277.9	\$283.3	\$290.6
<b>State and Local</b>	<b>\$589.4</b>	<b>\$609.4</b>	<b>\$618.4</b>	<b>\$638.3</b>	<b>\$671.3</b>
Sales	\$247.4	\$257.4	\$261.7	\$269.4	\$281.2
Bed Tax	\$44.2	\$45.3	\$45.8	\$46.6	\$48.3
Personal Income	\$58.9	\$60.8	\$61.7	\$57.8	\$61.2
Corporate	\$6.3	\$5.5	\$5.6	\$7.1	\$7.8
Social insurance	\$3.2	\$3.3	\$3.4	\$2.8	\$2.6
Excise and Fees	\$39.1	\$40.3	\$40.8	\$43.5	\$46.1
Property	\$190.3	\$196.8	\$199.4	\$210.9	\$224.1

Source: IMPLAN, Tourism Economics

# ECONOMIC IMPACTS

## Fiscal (tax)

Visitor spending, visitor supported jobs, and business sales generated \$671 million in governmental revenues.

Visitor activity supported \$302 million in state tax revenues in 2019. Local governments received \$369 million in revenue from economic activity associated with visitors.

For the state, sales tax receipts provide a large share of governmental revenues. For local governments, property taxes along with bed and sales taxes provide the majority of governmental revenues.

## Tax impacts

Amounts in millions of nominal dollars

	State	Local
<b>State Revenues</b>	<b>\$302</b>	<b>\$369</b>
Sales	\$213	\$68
Bed tax	\$0	\$48
Personal income	\$61	\$0
Corporate	\$8	\$0
Social insurance	\$3	\$0
Excise and fees	\$17	\$29
Property	\$0	\$224

Source: IMPLAN, Tourism Economics

# ECONOMIC IMPACT IN CONTEXT

# ECONOMIC IMPACTS IN CONTEXT

Figures in context



## Visitor spending

Stacking \$7.3 billion worth of \$5 bills would reach 100 miles high- similar to the distance from Salina to Hays.



## Employment

Tourism supports 97,234 Kansas jobs in 2019- enough to fill Bill Snyder Family Stadium twice over.



## Total visitor business sales

The \$11.8 billion in total impact in 2019 is similar in size to what Americans spend on bottled water in a year.



## Taxes

To make up for the \$671 million in state and local taxes generated by visitor activity, each household in the state would need to contribute \$600 to maintain the current level of government.

# ABOUT TOURISM ECONOMICS

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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