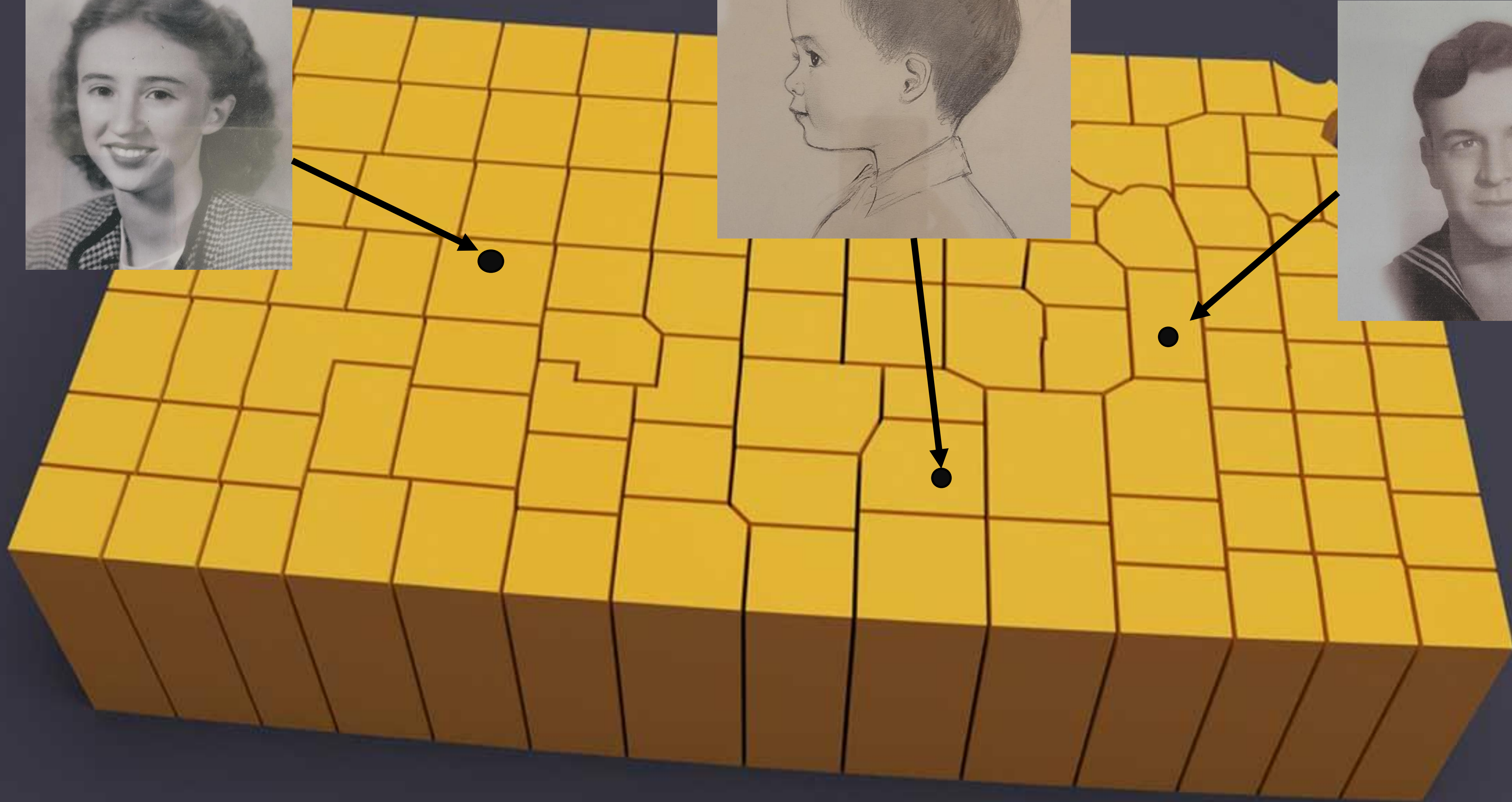
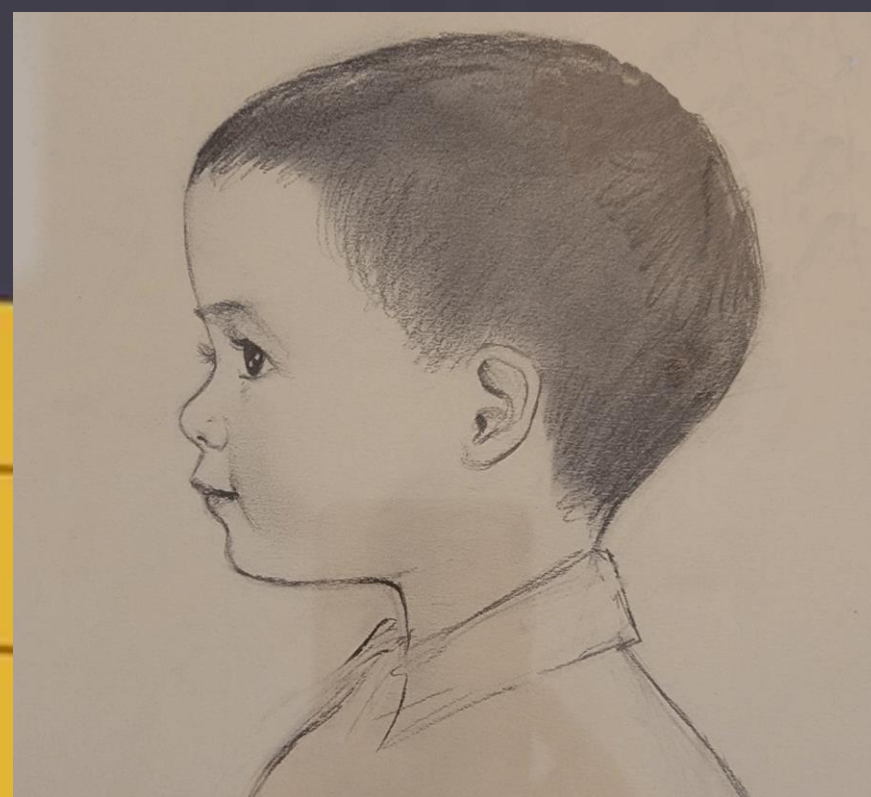
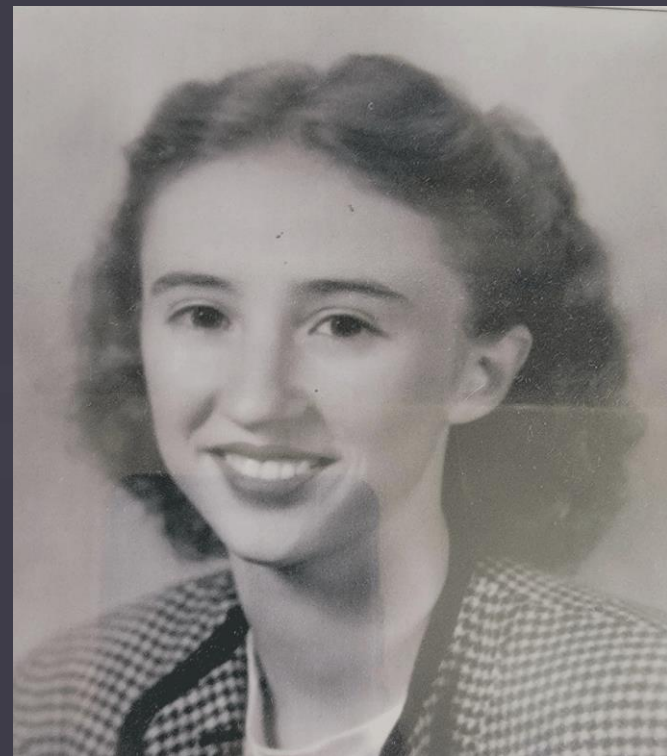
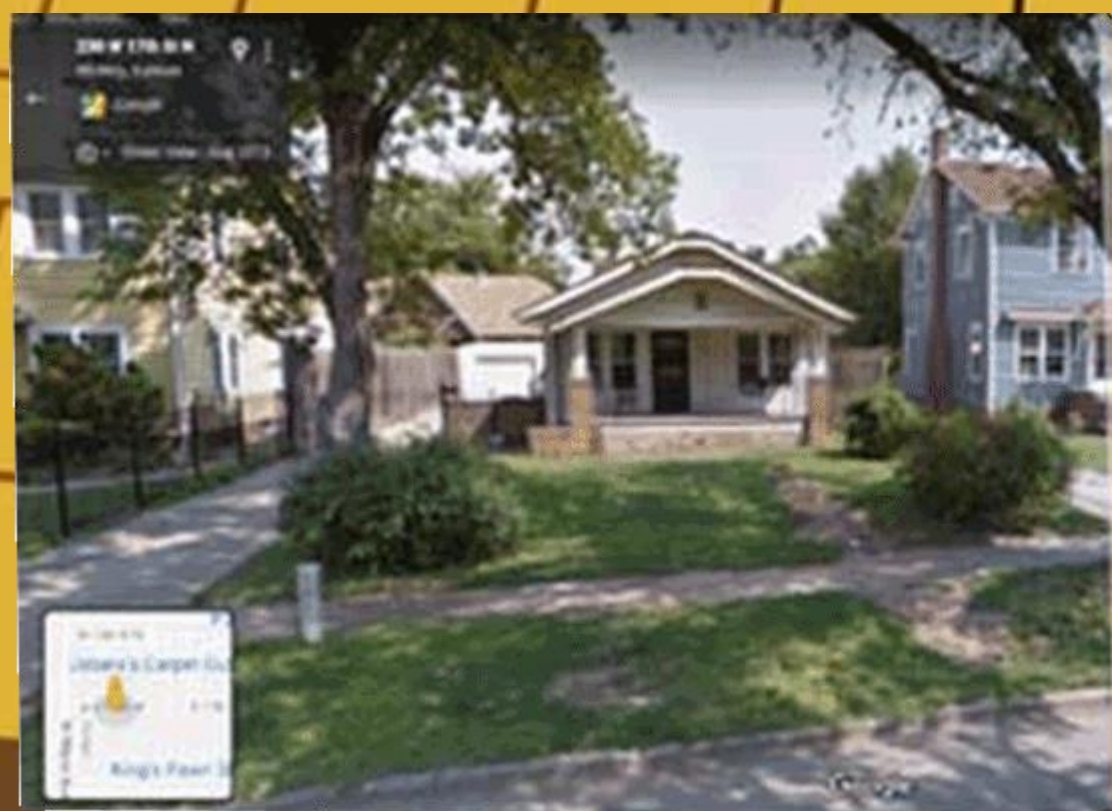
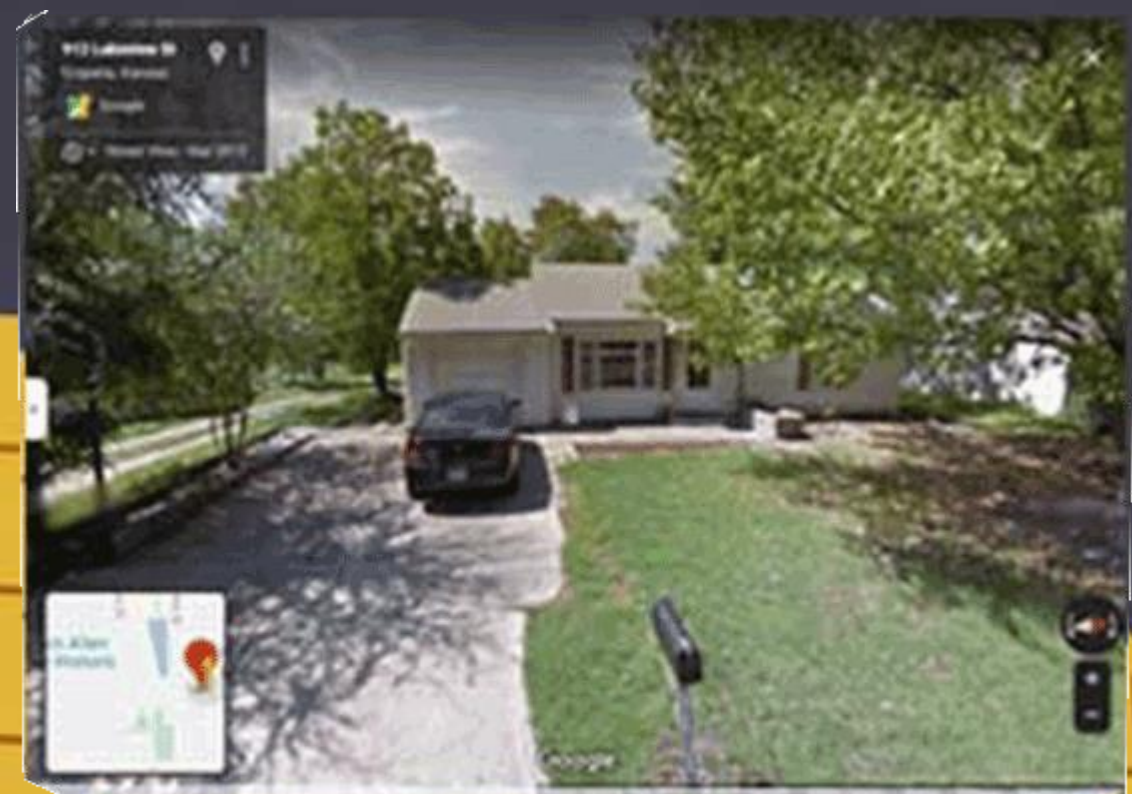


THE STATE OF THE KANSAS TRAVELER

Destination  Analysts







1. The State of the American Traveler



- Online survey conducted since 2006
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,055 American leisure travelers
- Data collected Friday-Sunday of last week
- Examines traveler sentiment, motivations & behaviors
- Quarterly project

2. Travel Sentiment Index Survey



- Online survey conducted since the start of the pandemic
- Data collected weekly/bi-weekly
- Survey invitation sent to a representative sample of adults in the four major Census regions
- Sample of 1,200 American leisure travelers each wave
- Over 91,000 Americans surveys in total
- Examines traveler sentiment, motivations & behaviors

AGENDA.

- **Current traveler sentiment**
- **Kansas as a destination**



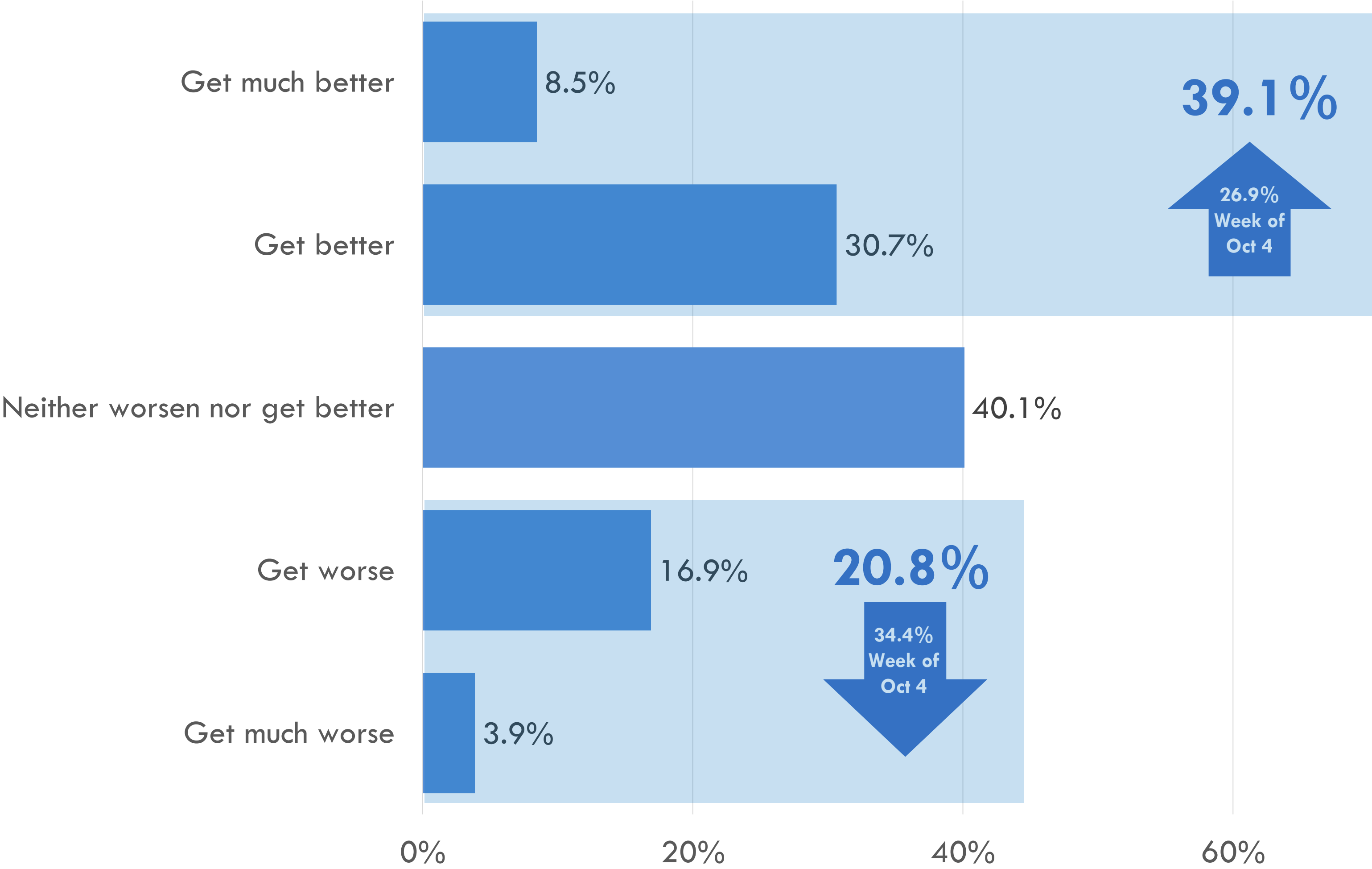
CURRENT TRAVELER SENTIMENT

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)

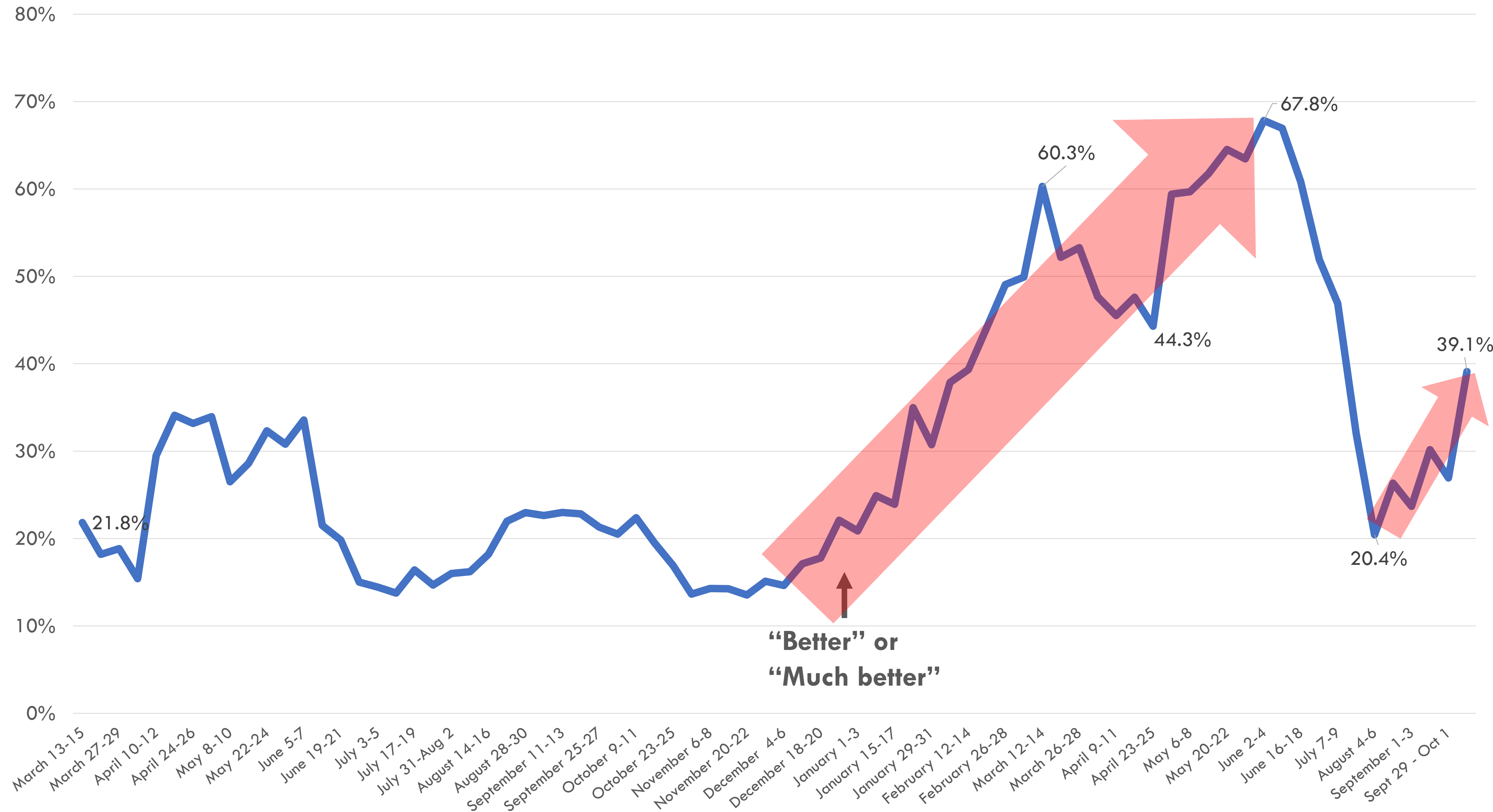


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-76)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will get _____

(Base: Waves 1-76. All respondents, 1,200+ completed surveys each wave.)

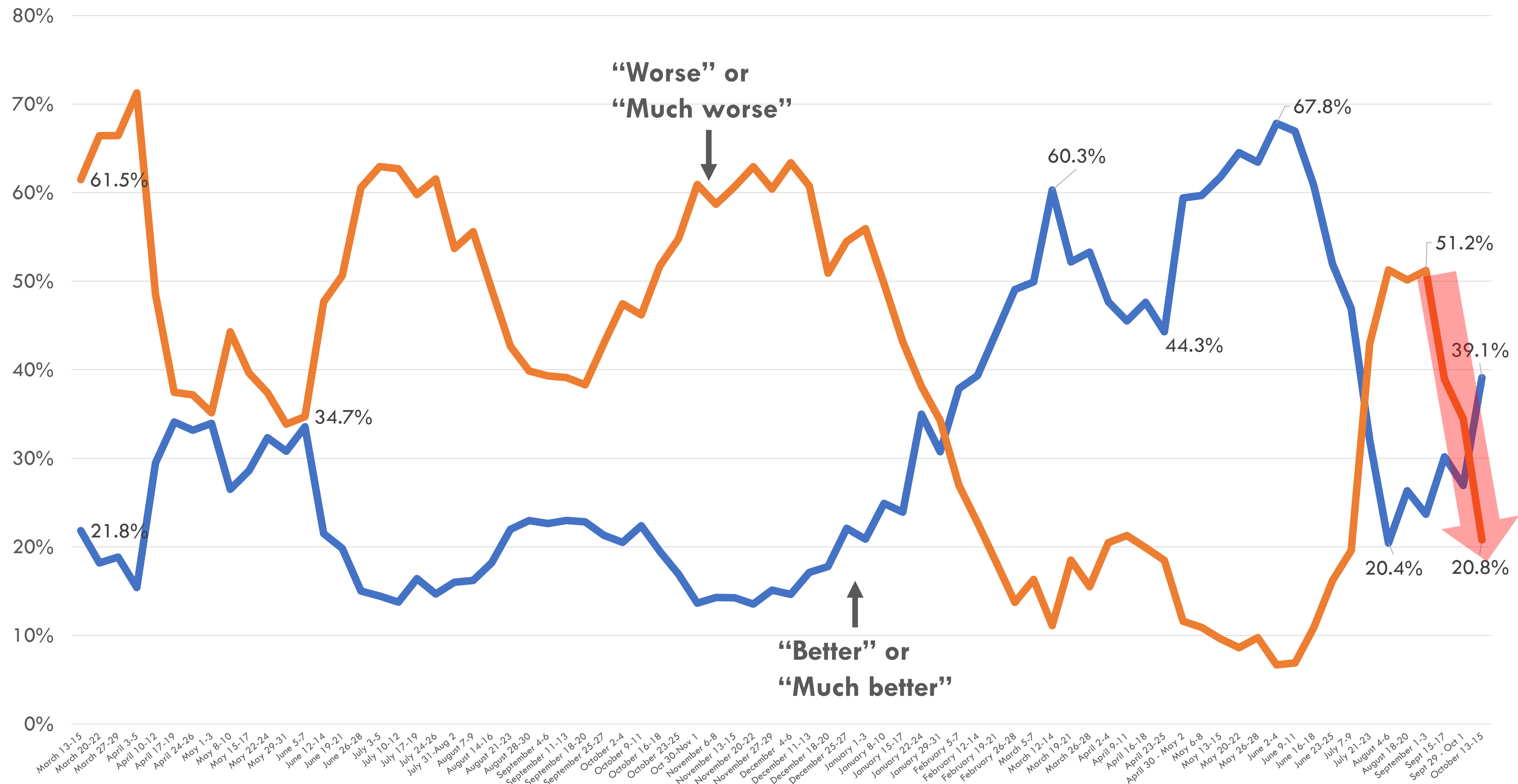


EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (WAVES 1-76)

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?

In the next month the coronavirus situation will get _____

(Base: Waves 1-76. All respondents, 1,200+ completed surveys each wave.)

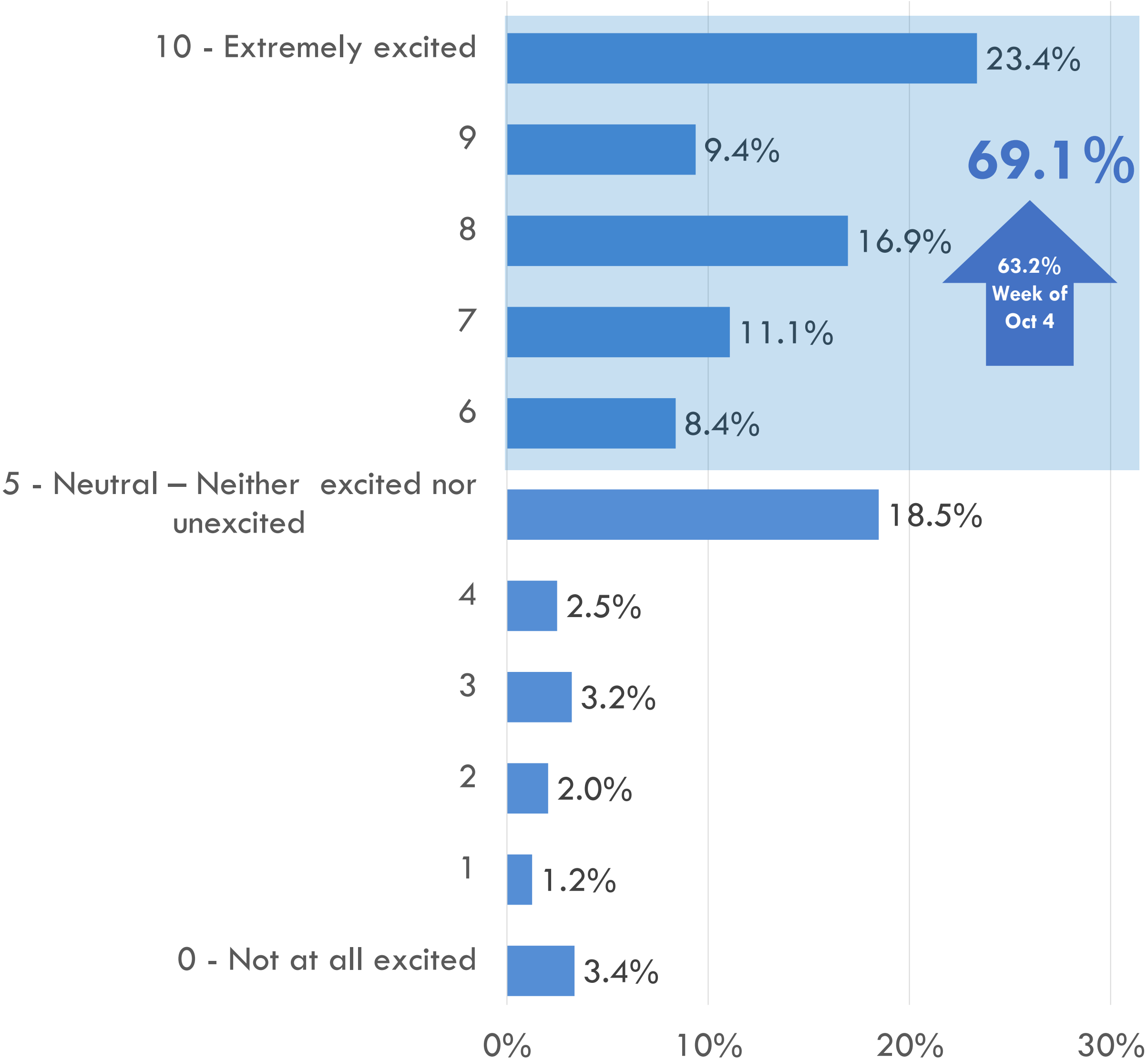


EXCITEMENT TO TRAVEL NOW

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

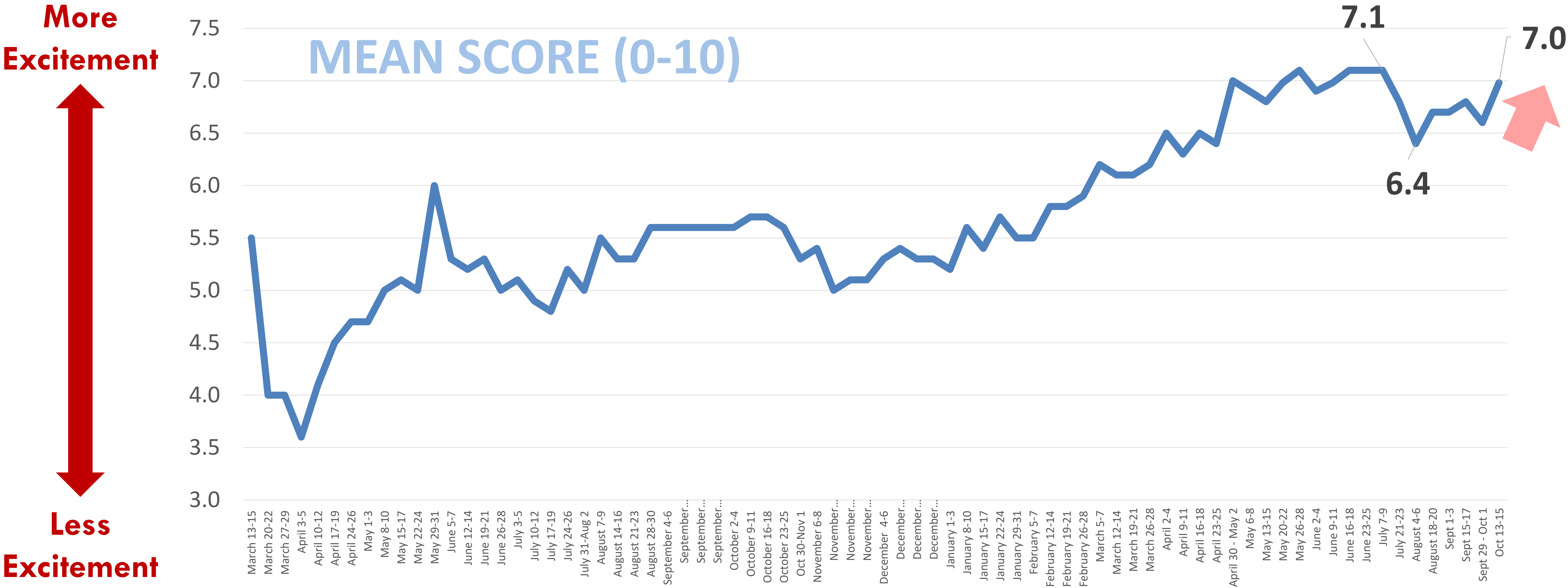
How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



EXCITEMENT TO TRAVEL NOW

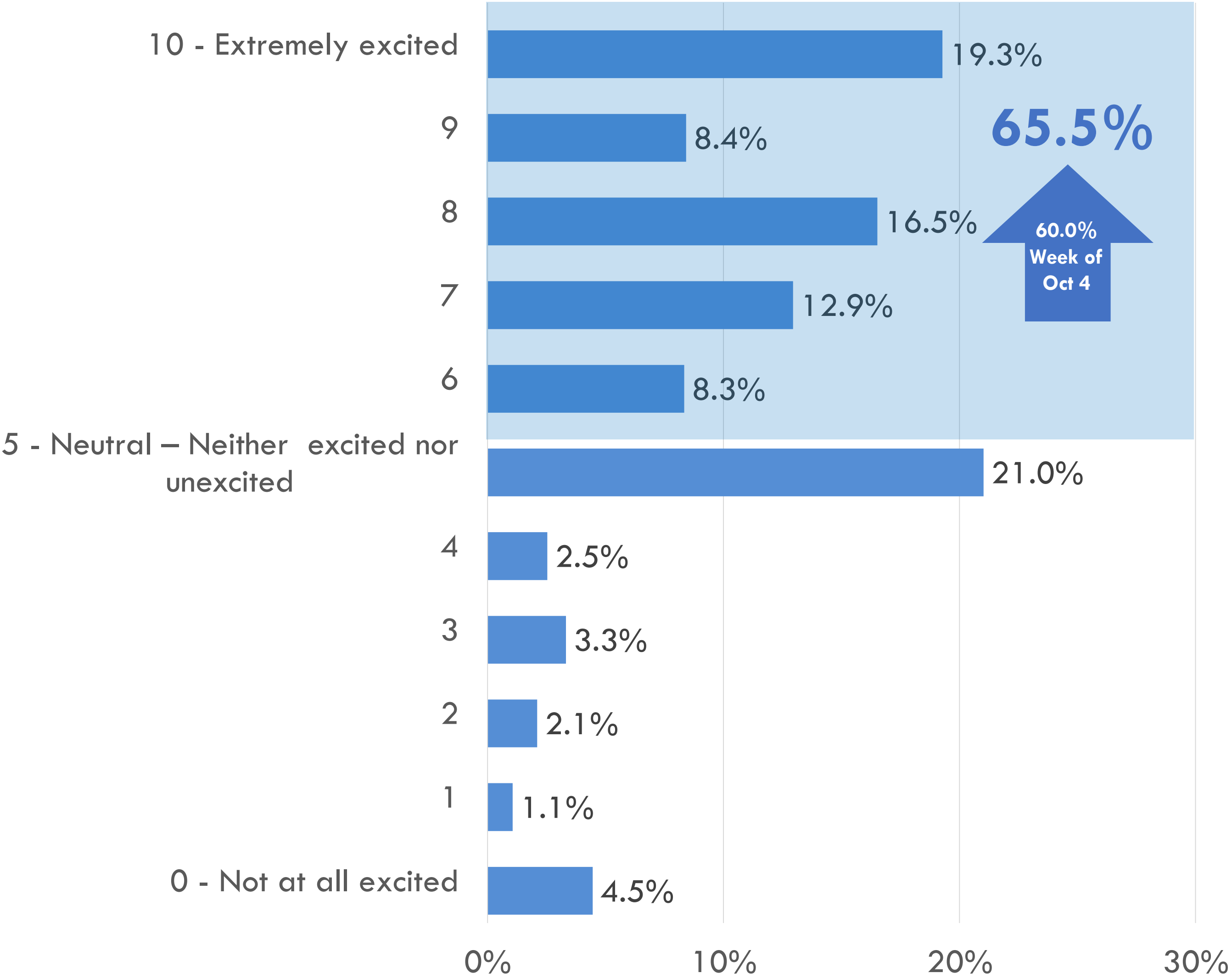
Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month. How excited would you be to go? (Assume the getaway is to a place you want to visit)



OPENNESS TO TRAVEL INSPIRATION

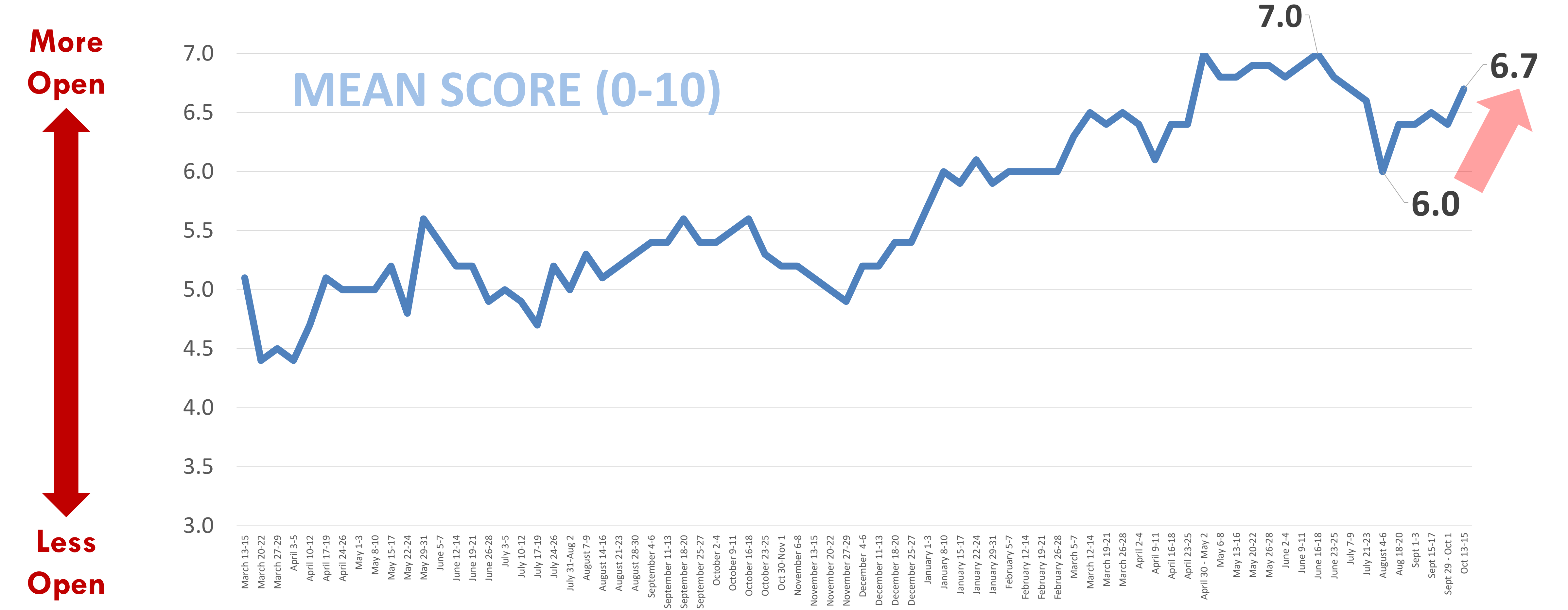
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



OPENNESS TO TRAVEL INSPIRATION

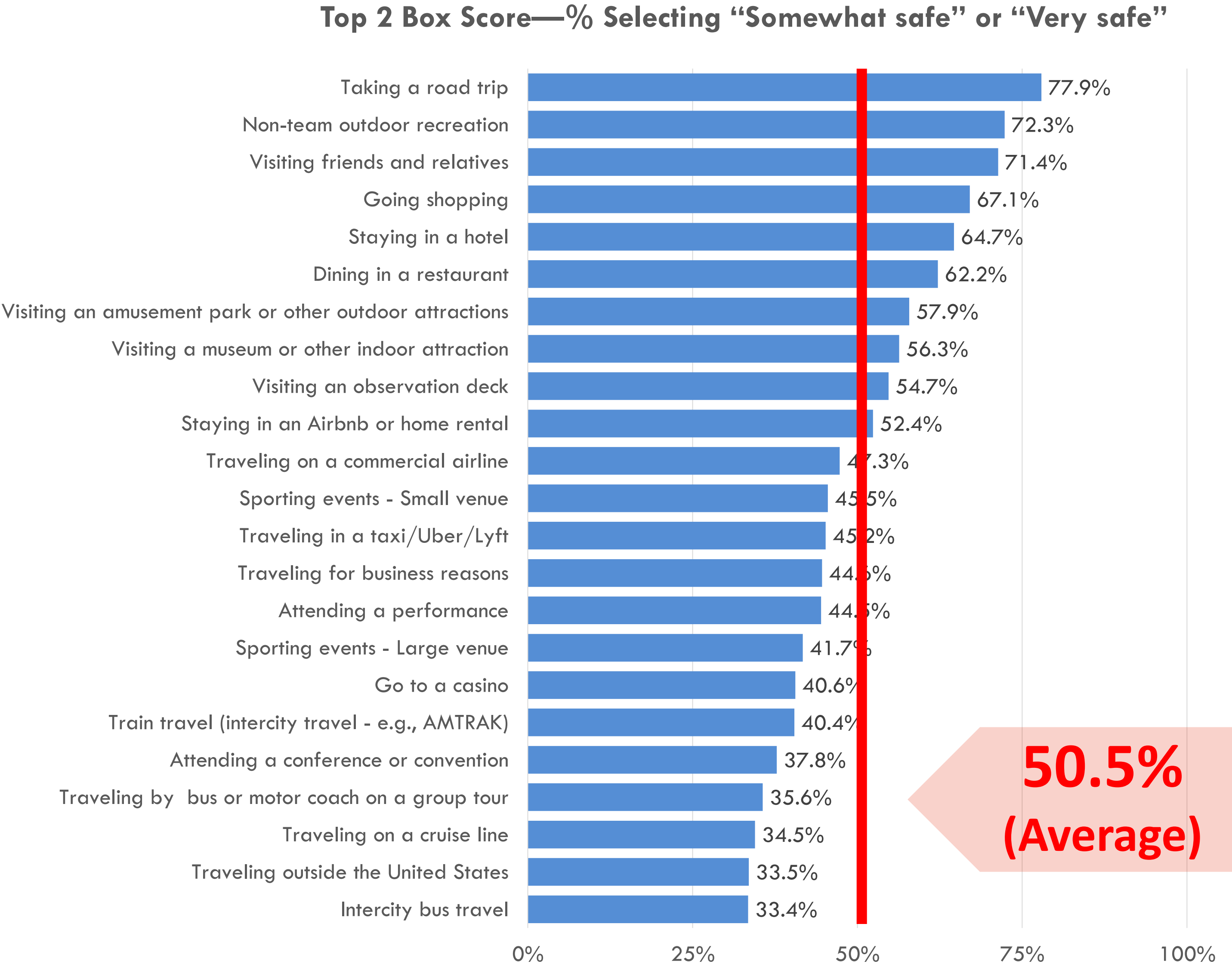
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?



SAFETY PERCEPTIONS OF TRAVEL ACTIVITIES

Question: At this moment, how safe would you feel doing each type of travel activity?

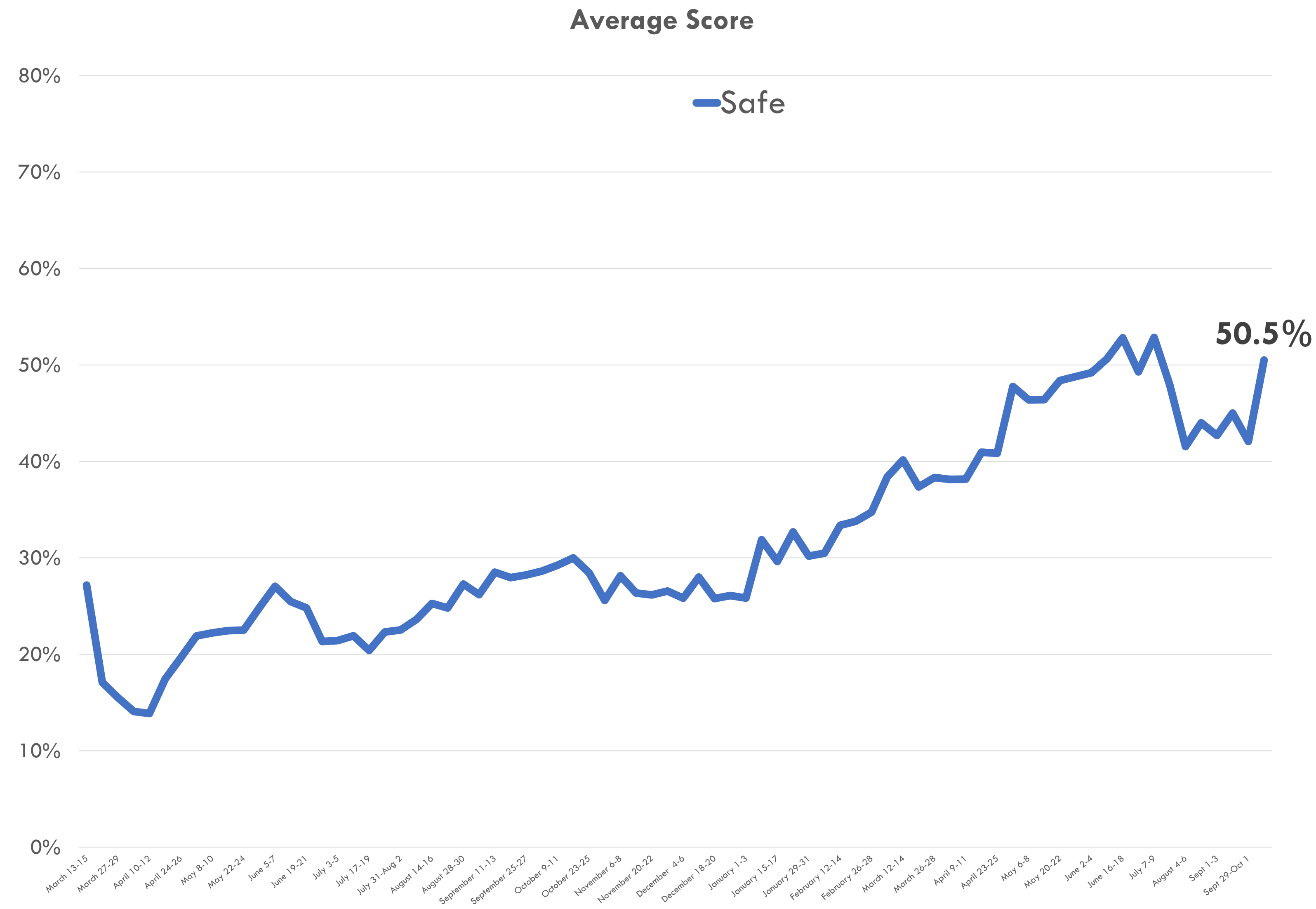
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



AVERAGE SAFETY PERCEPTIONS OF TRAVEL ACTIVITIES (MAR 2020 – OCT 2021)

Question: At this moment, how safe would you feel doing each type of travel activity?

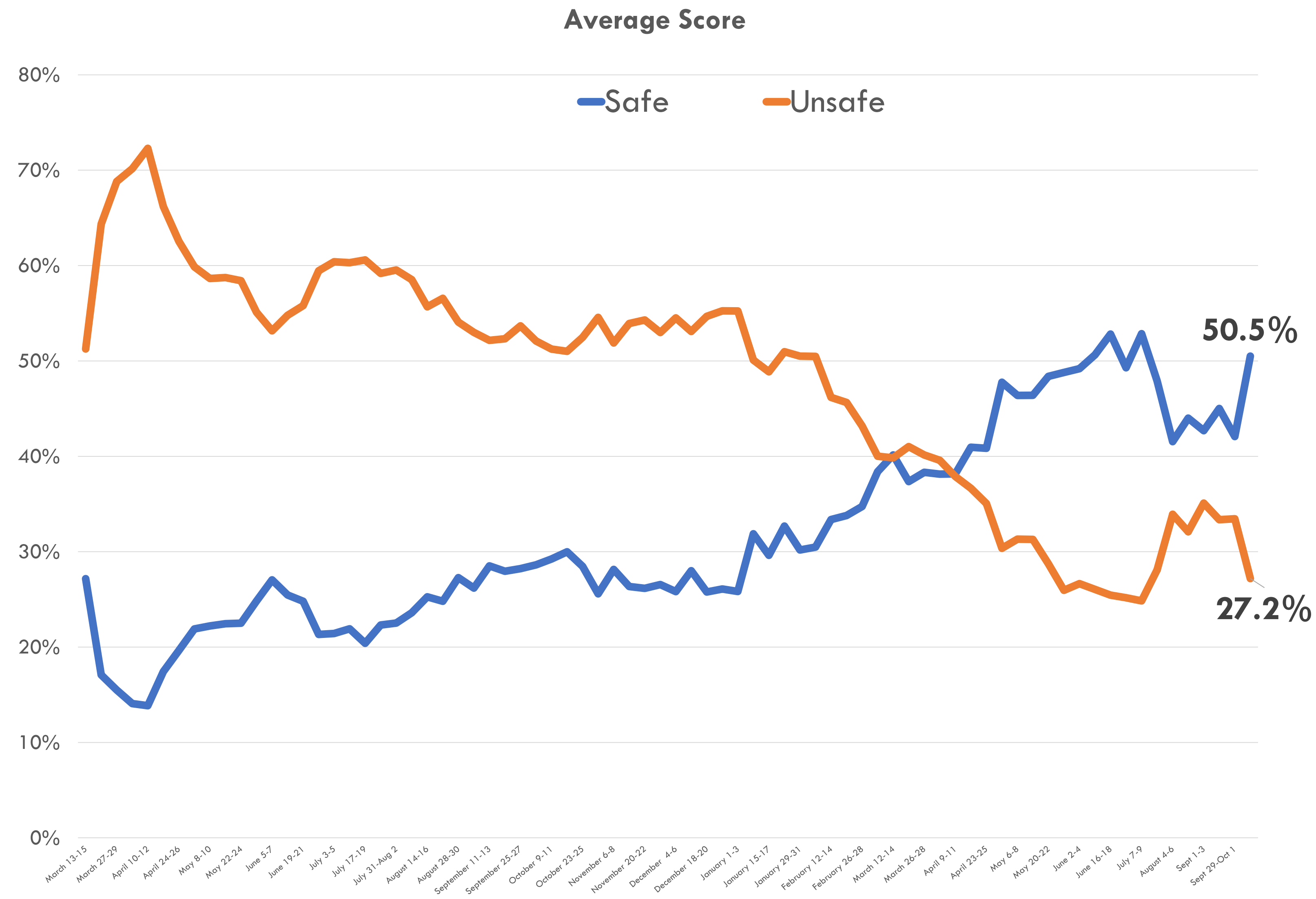
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



AVERAGE SAFETY PERCEPTIONS OF TRAVEL ACTIVITIES (MAR 2020 – OCT 2021)

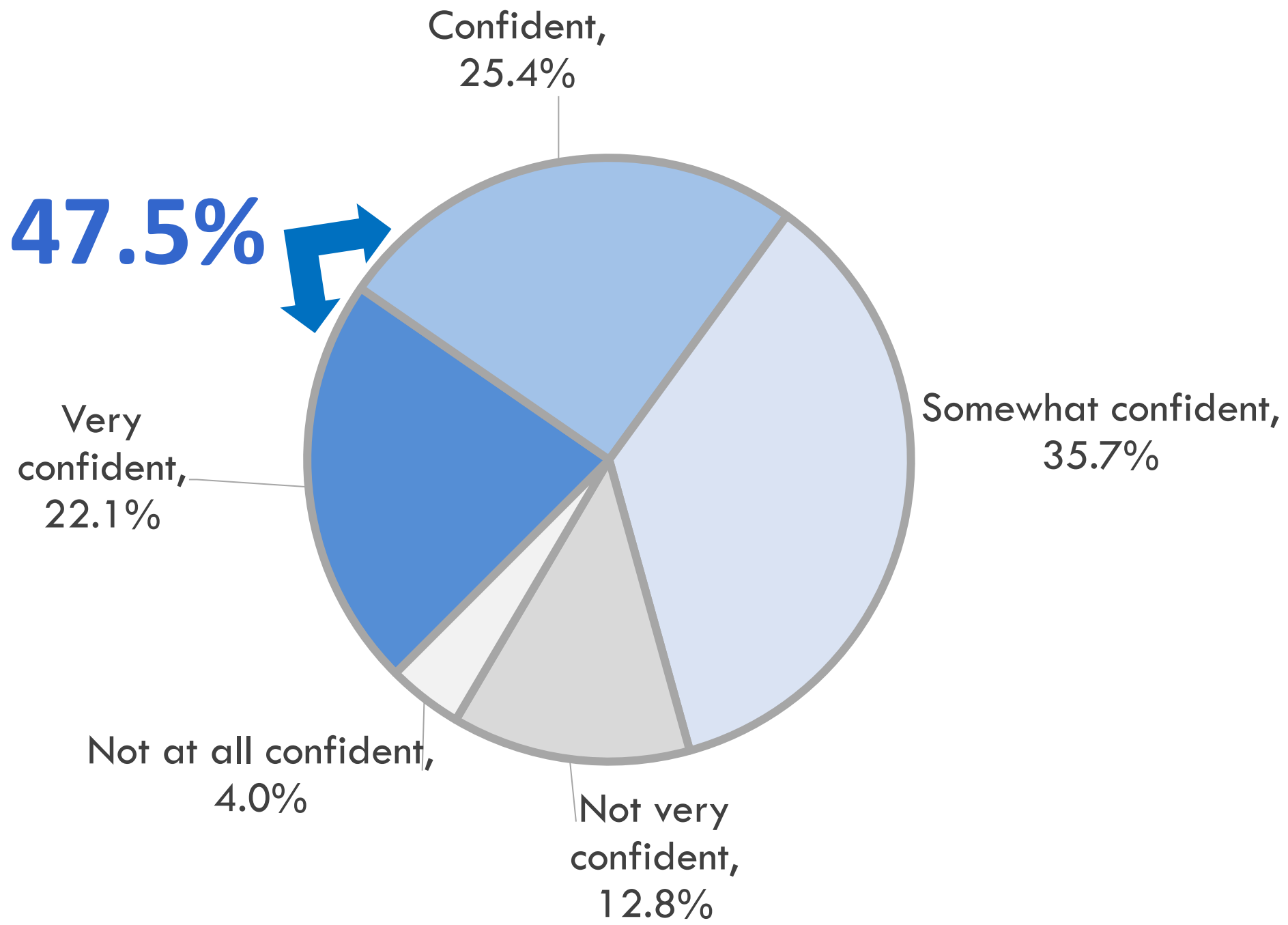
Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)

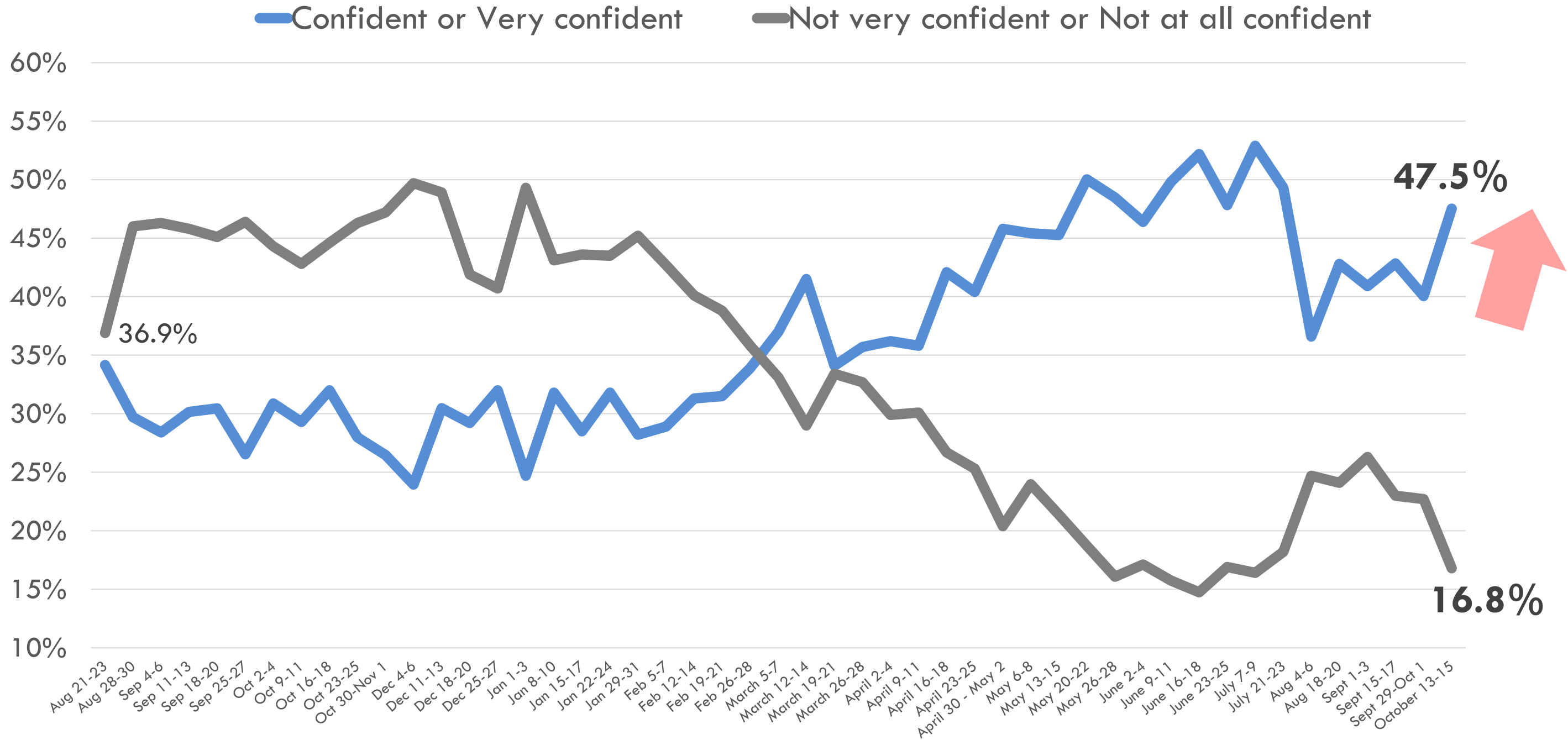


CONFIDENCE IN ABILITY TO TRAVEL SAFELY

Question: How confident are you that you can travel safely in the current environment?



Historical data

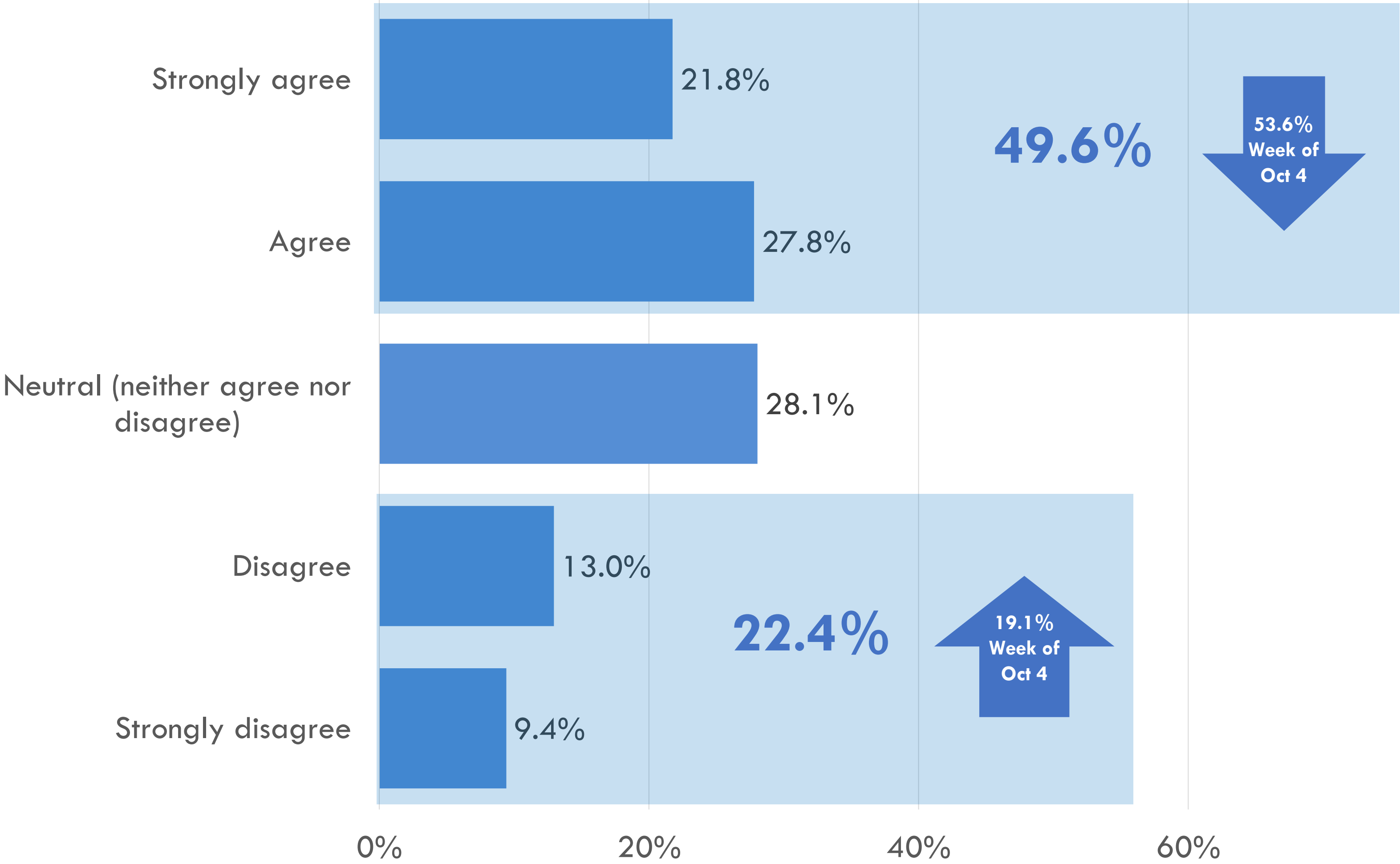


(Base: Wave 24-34 and 39-76 data. All respondents, 1,200+ completed surveys each wave.)

CONCERNS ABOUT THE DELTA VARIANT

Question: Recent news about increasing “Delta Variant” cases make me less interested in traveling right now.

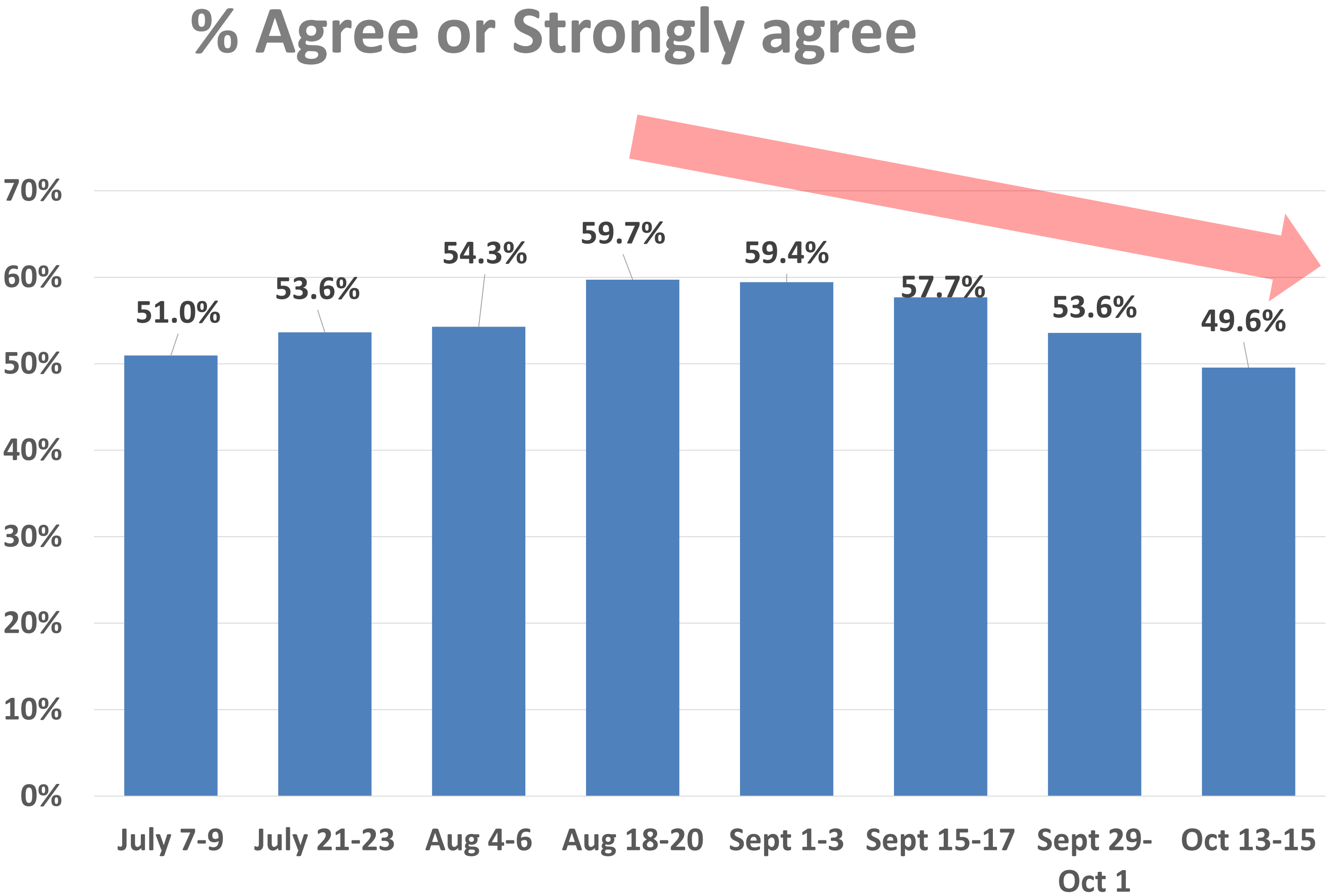
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



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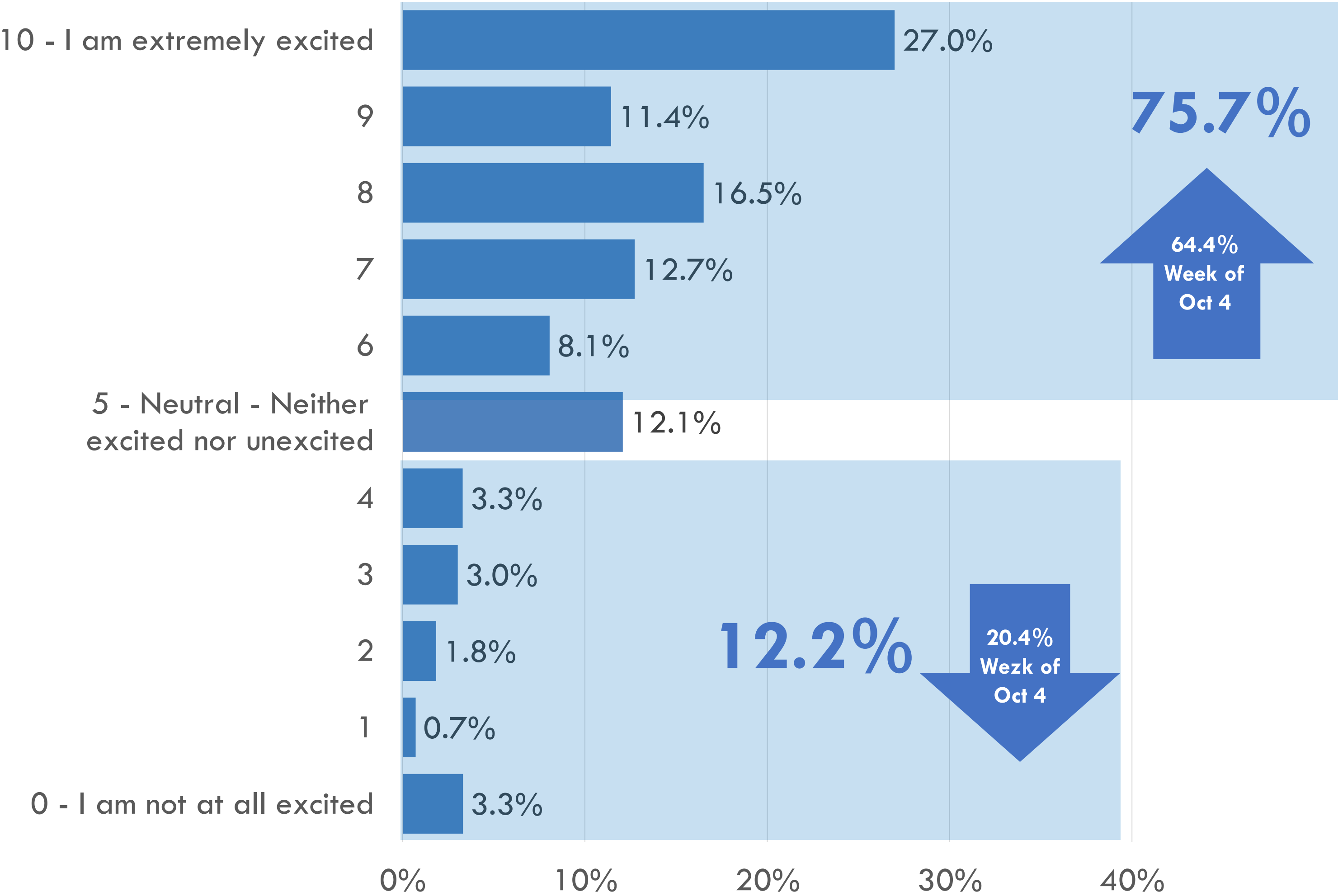
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



EXCITEMENT FOR LEISURE TRAVEL IN THE NEXT 12 MONTHS

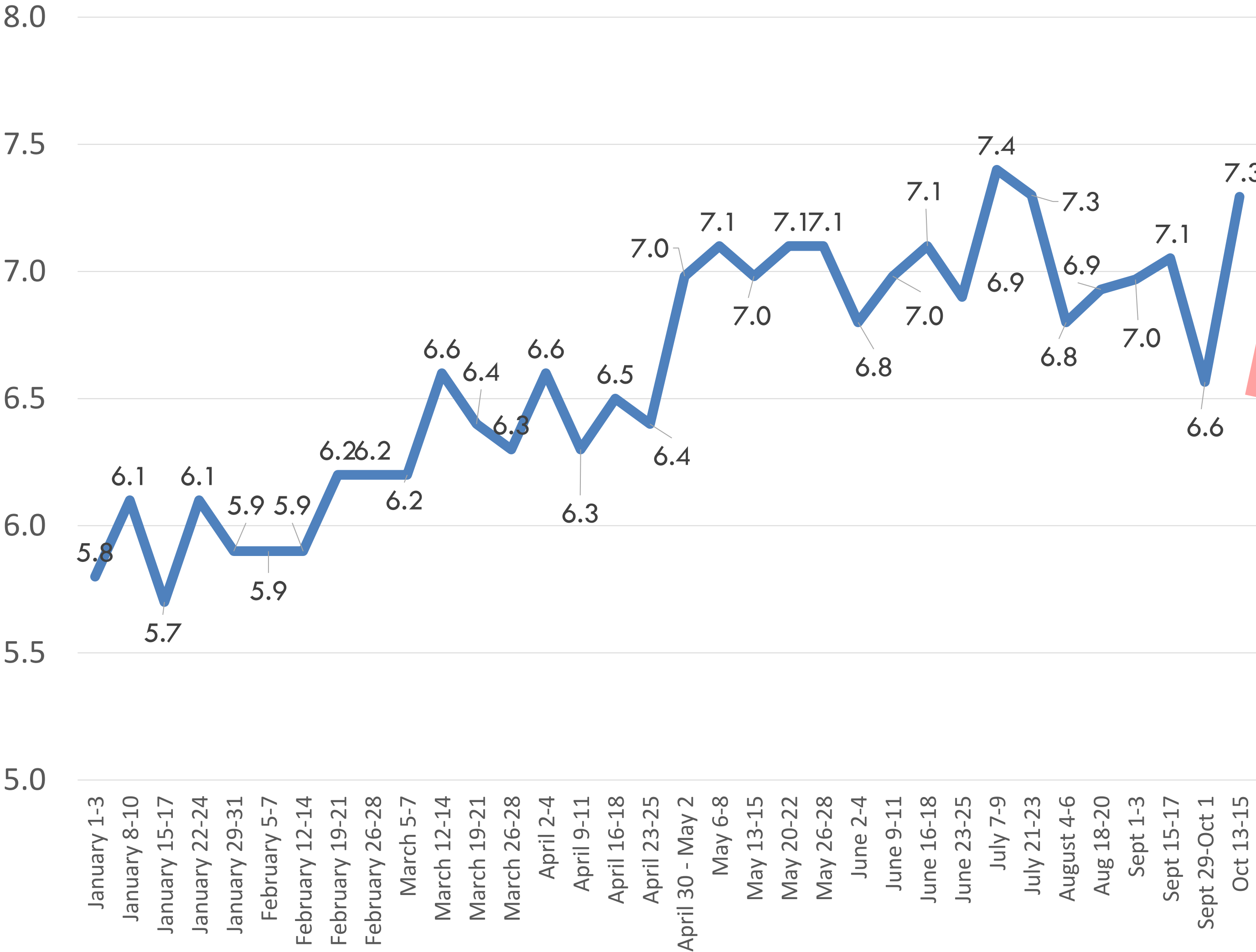
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



EXCITEMENT FOR LEISURE TRAVEL IN NEXT 12 MONTHS

Question: Which best describes how excited you are about LEISURE TRAVEL in the **NEXT TWELVE (12) MONTHS?**
(Please answer using the 11-point scale below)



**More
Excitement**

**Less
Excitement**



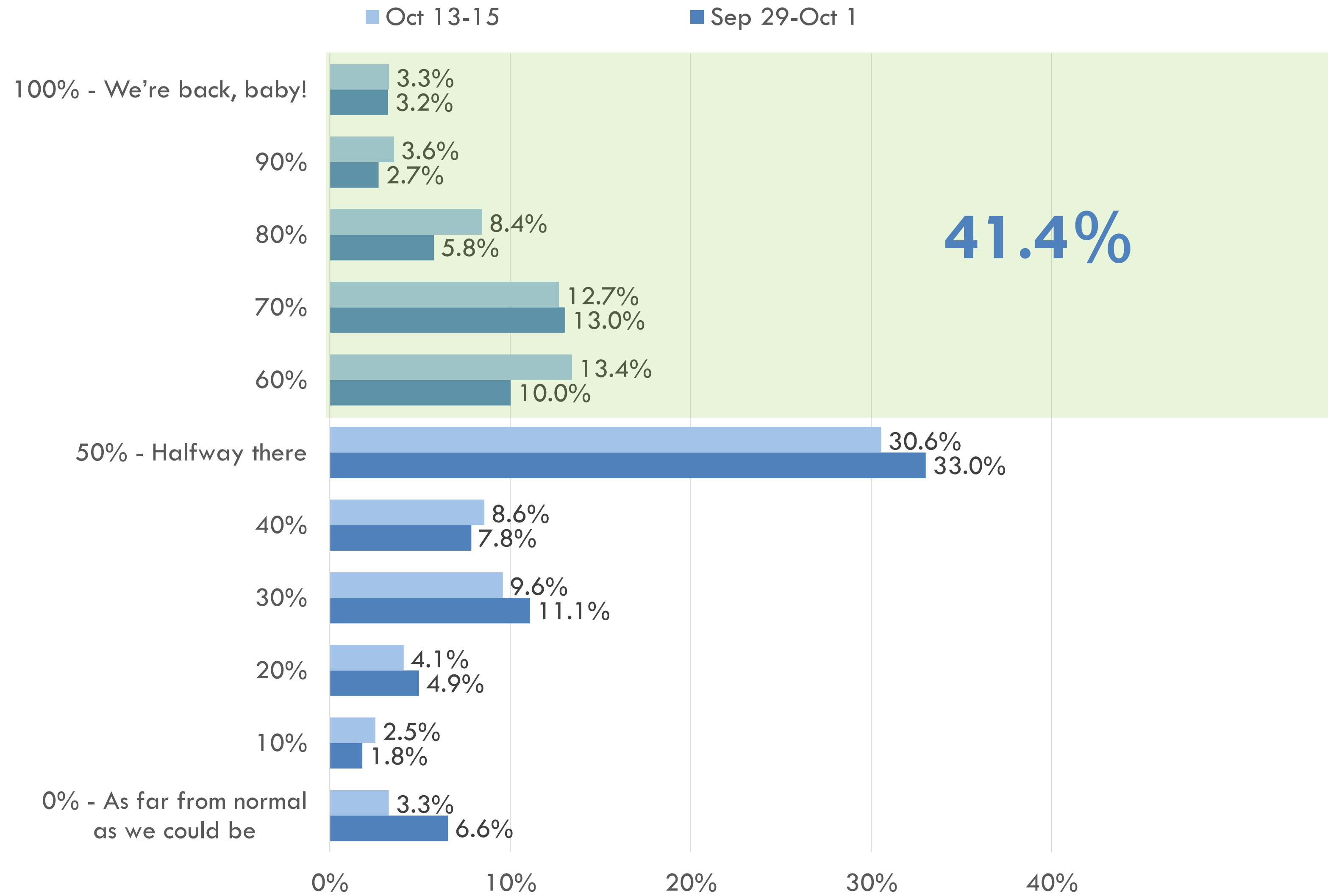
Return to Normalcy



RETURNING TO NORMAL

Question: Overall, how close to “normal” is the U.S. in terms of resuming leisure activities (dining out, travel, etc.)?

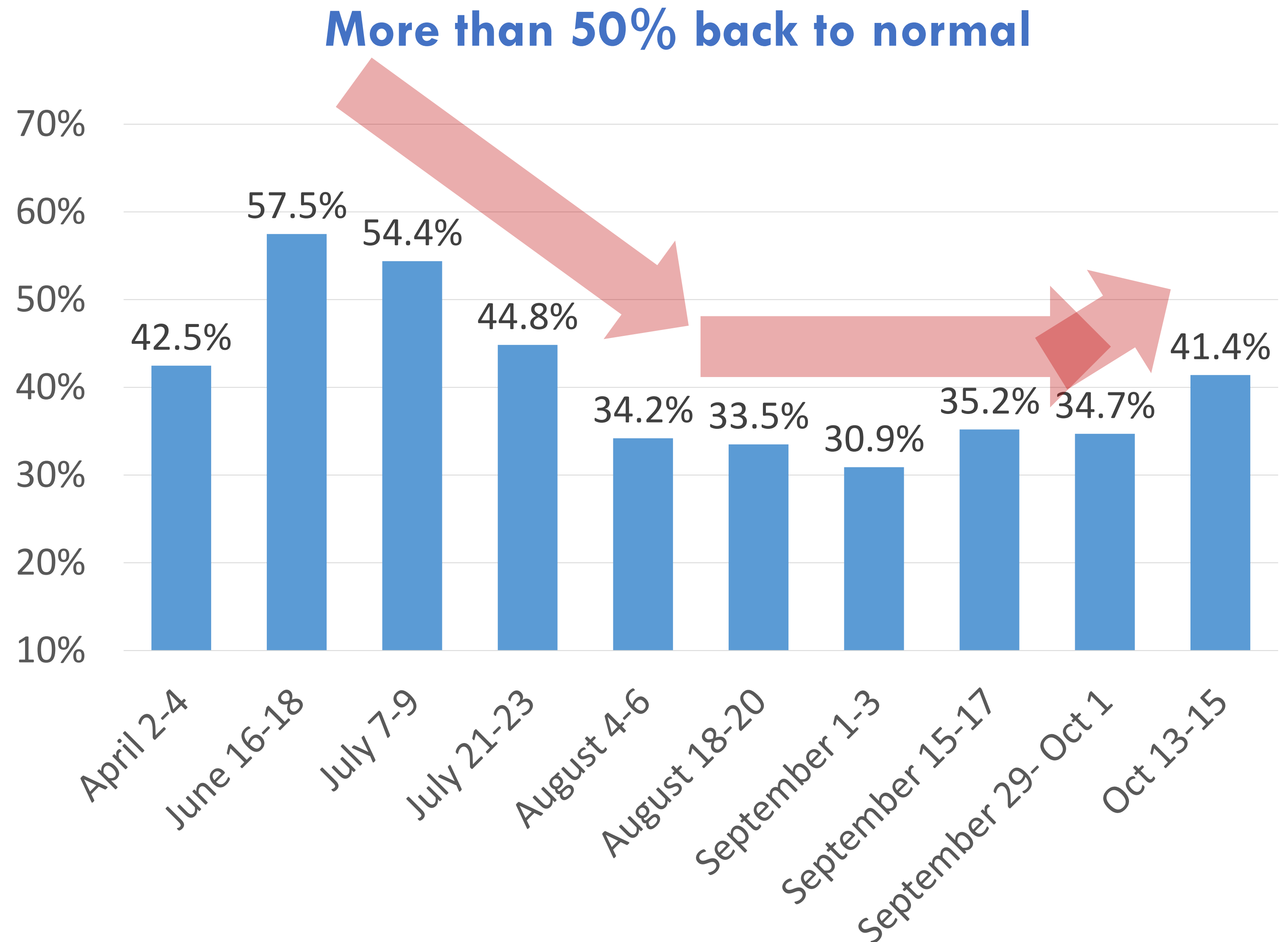
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



RETURNING TO NORMAL

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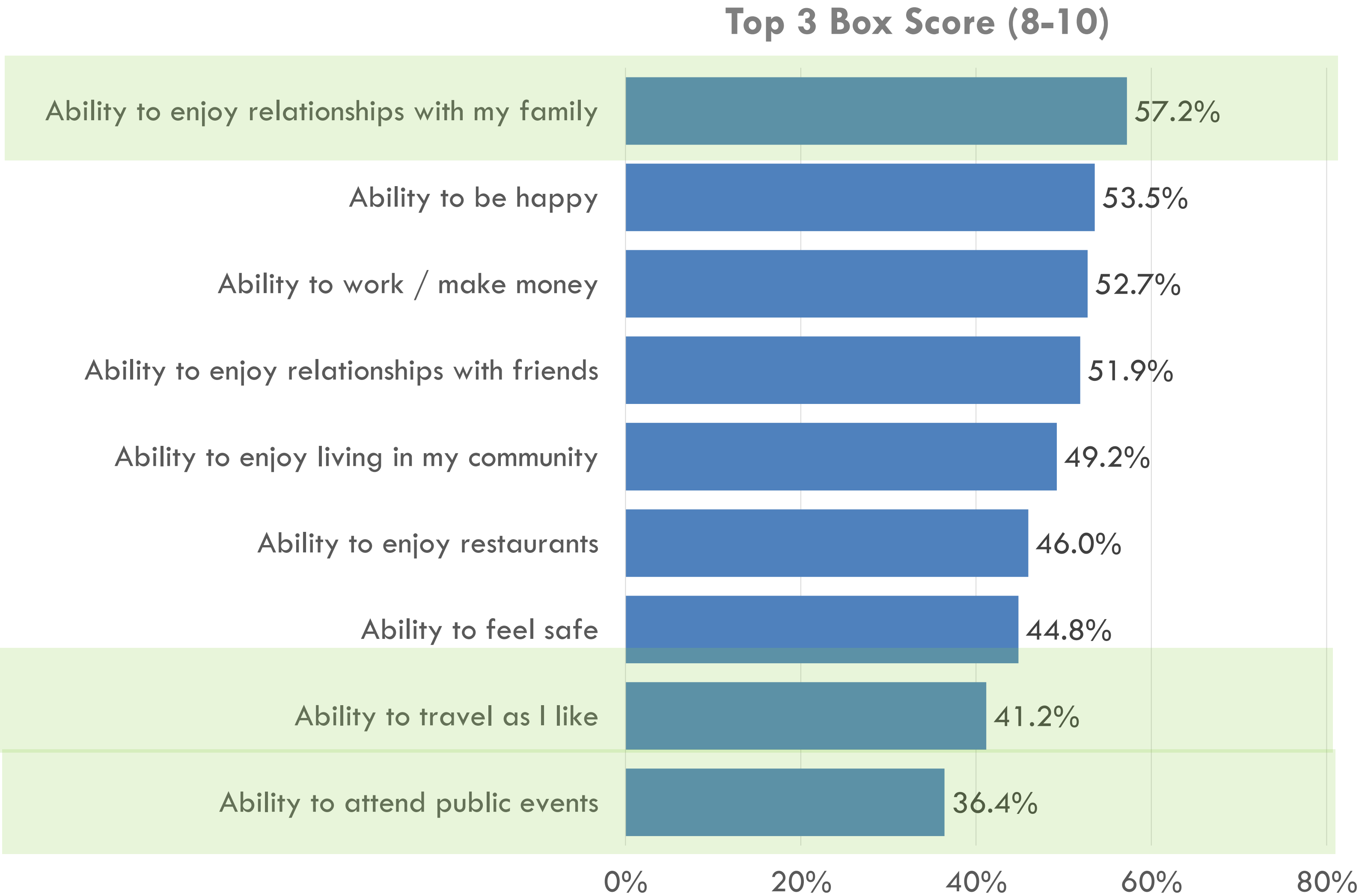
(Base: Wave 70 data. All respondents, 1,208 completed surveys. Data collected July 21-23, 2021)



RETURNING TO NORMAL

Question: Now let's talk about how close (or far from) your life is to normal (i.e., being totally unaffected by the COVID-19 situation). For each, tell us about your life using the scale where 1 equals "Still very far from normal" and 10 equals "Already completely normal."

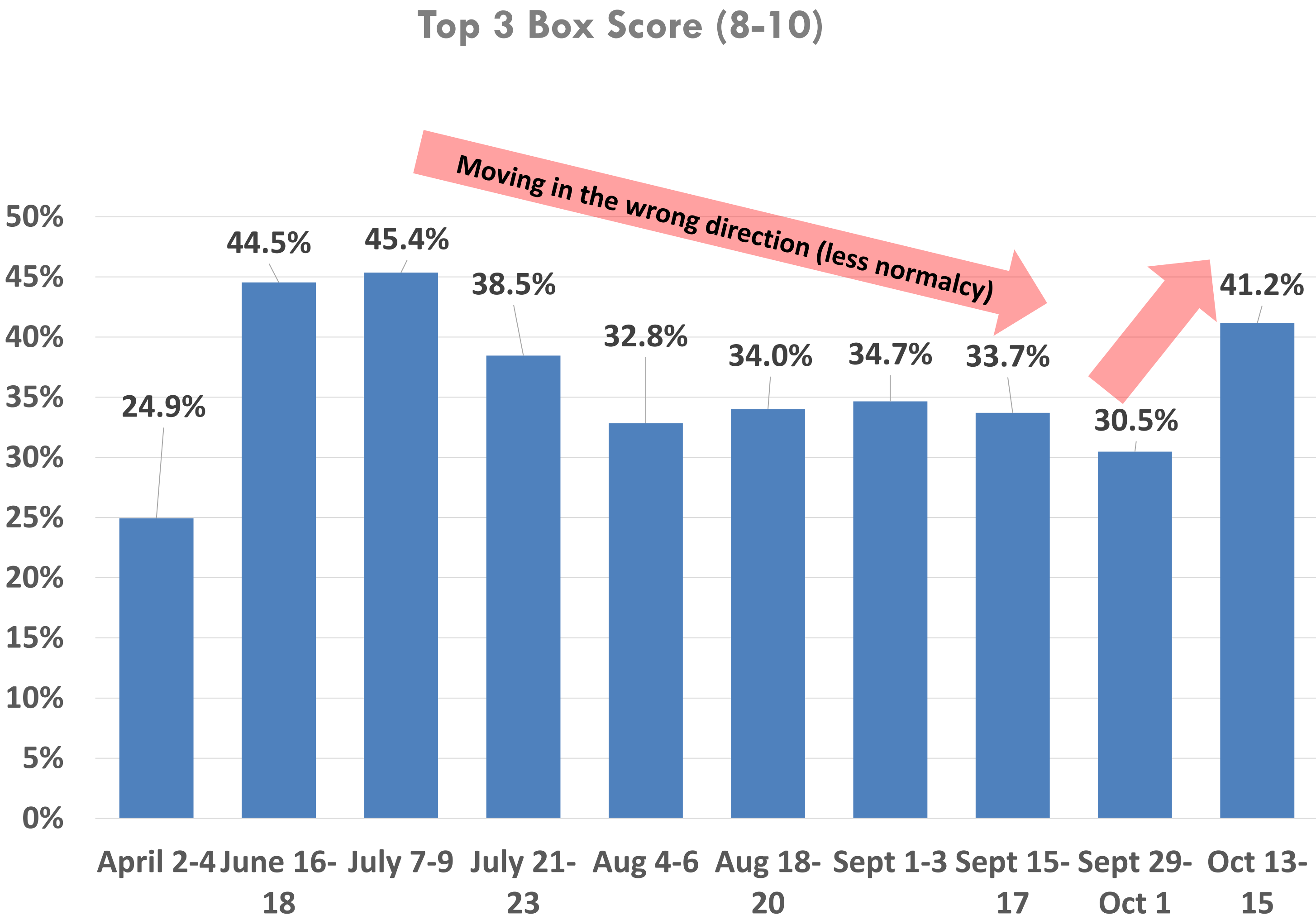
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



ABILITY TO TRAVEL AS I LIKE

Question: Now let's talk about how close (or far from) your life is to normal (i.e., being totally unaffected by the COVID-19 situation). For each, tell us about your life using the scale where 1 equals "Still very far from normal" and 10 equals "Already completely normal."

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



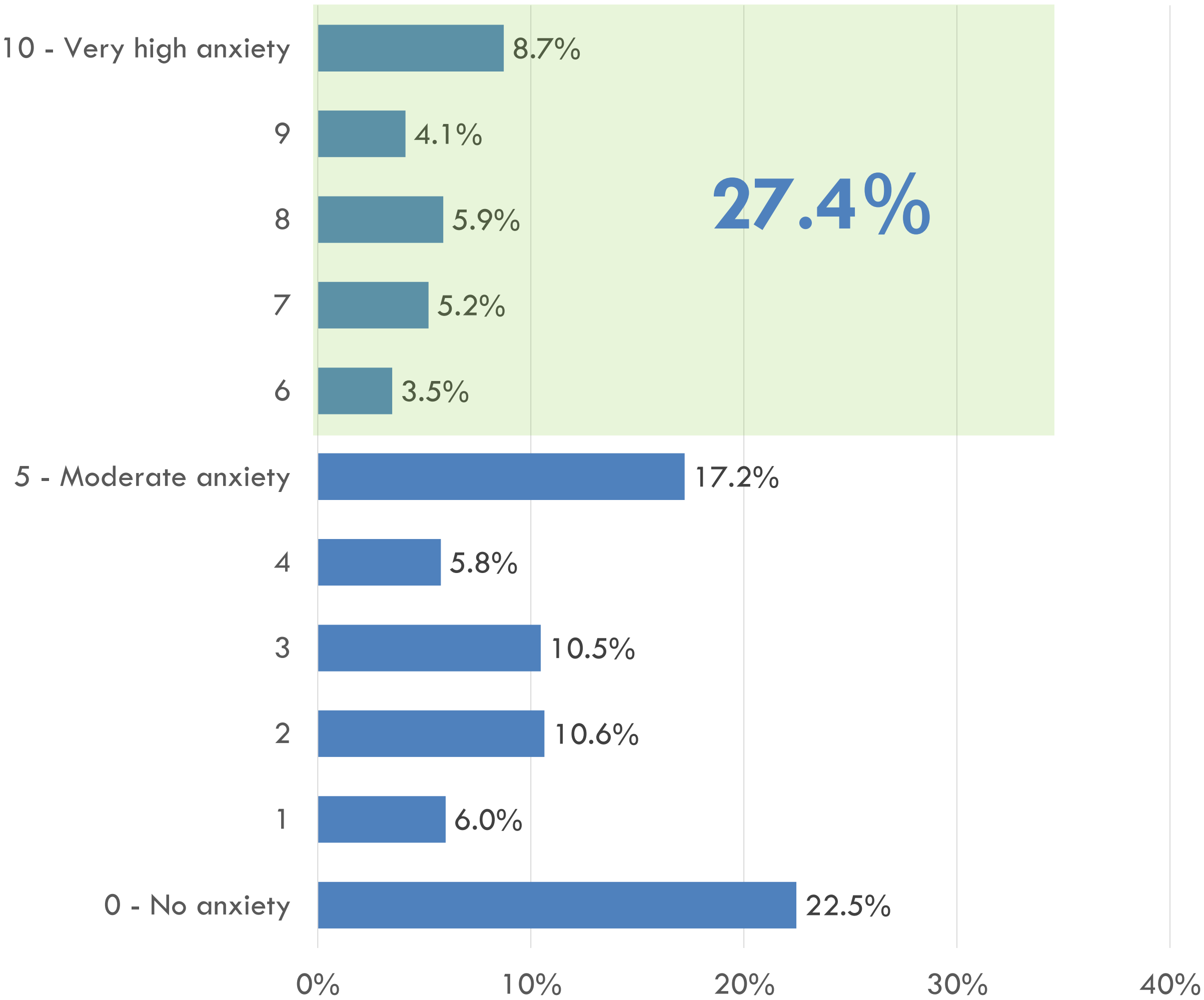
Question: While traveling on
your most recent overnight trip,
HOW MUCH ANXIETY did you
generally feel about the COVID-
19 situation?



MOST RECENT OVERNIGHT TRIP: COVID-19 ANXIETY

Question: While traveling on your most recent overnight trip, HOW MUCH ANXIETY did you generally feel about the COVID-19 situation?

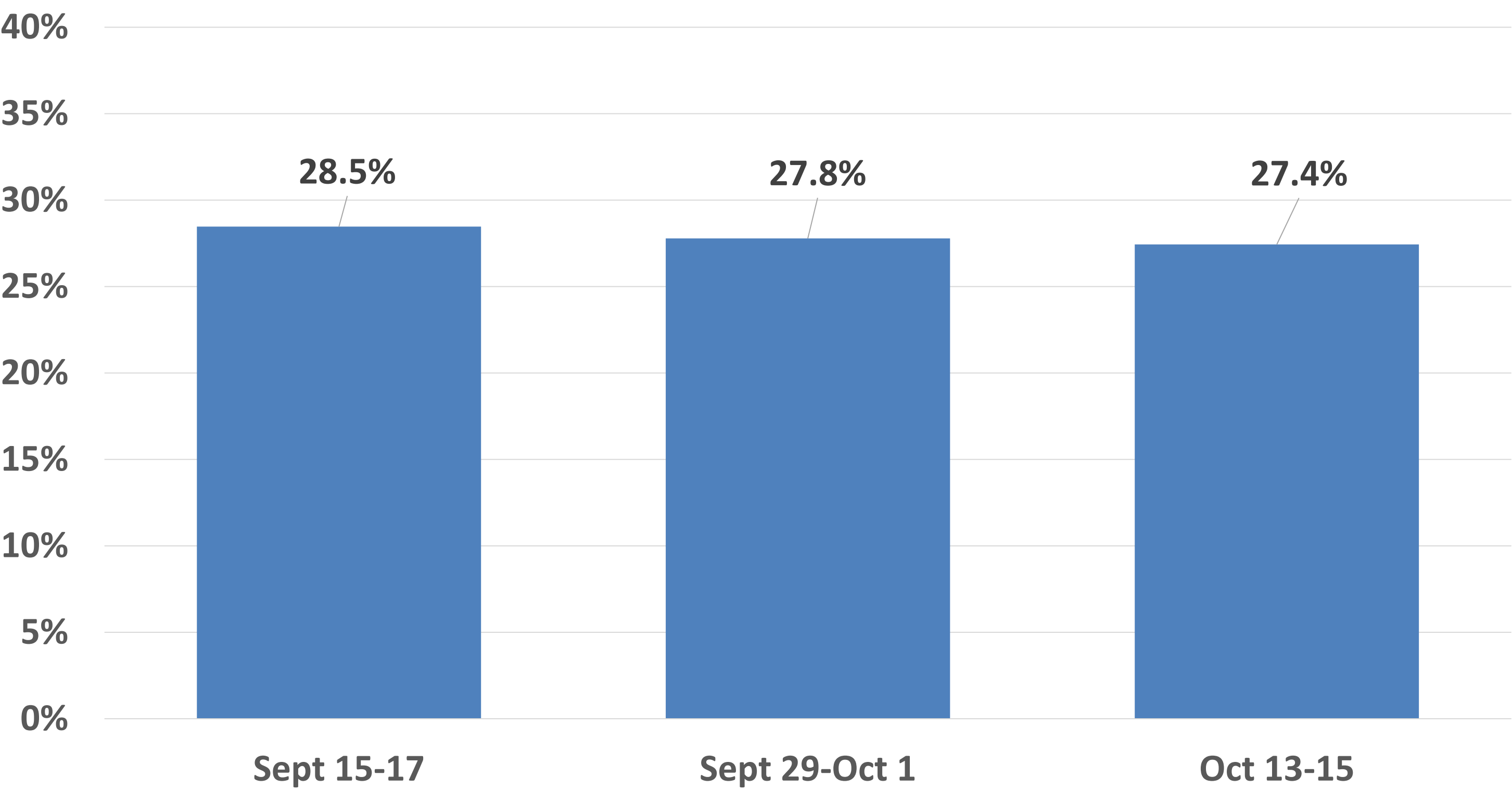
(Base: Wave 76 data. Respondents who took an overnight trip in the past three months, 620 completed surveys. Data collected October 13-15, 2021.)



MOST RECENT OVERNIGHT TRIP: COVID-19 ANXIETY

Question: While traveling on your most recent overnight trip, HOW MUCH ANXIETY did you generally feel about the COVID-19 situation?

(Base: Wave 76 data. Respondents who took an overnight trip in the past three months, 620 completed surveys. Data collected October 13-15, 2021.)



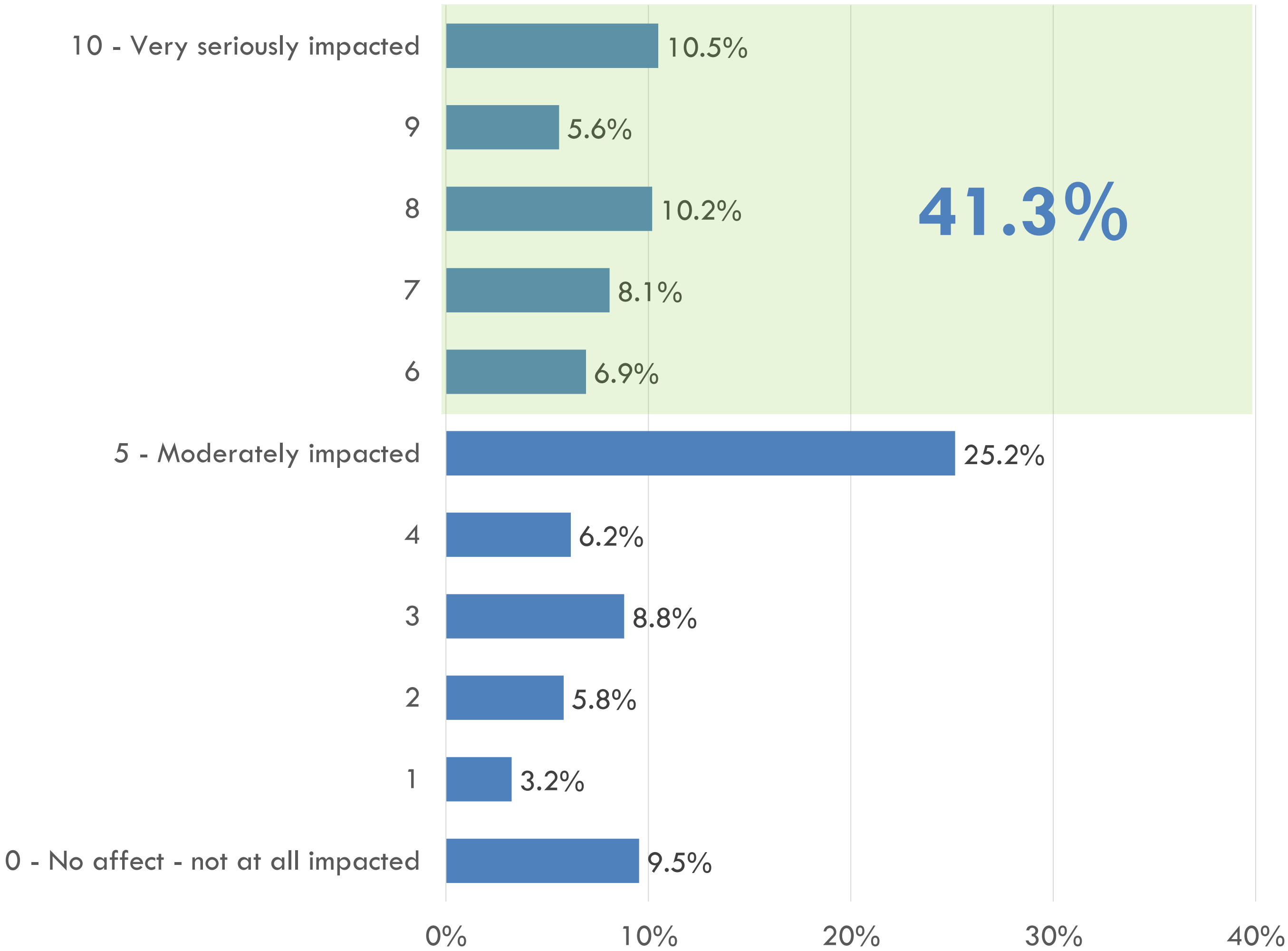
Question: How much is the
COVID-19 issue impacting your
ability to have **meaningful travel**
experiences? (Select one)



COVID-19'S IMPACT ON MEANINGFUL TRAVEL EXPERIENCES

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences?
(Select one)

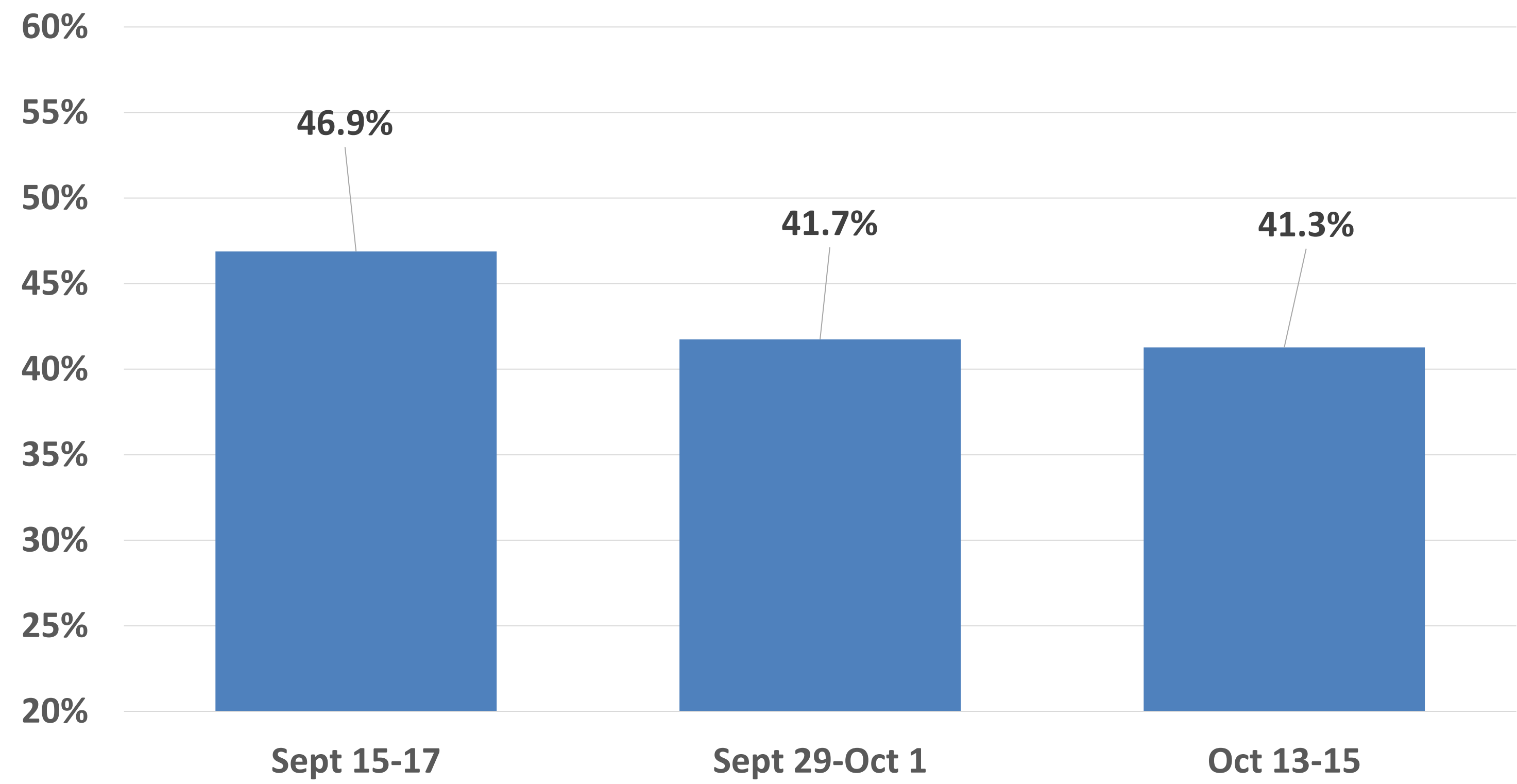
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



COVID-19'S IMPACT ON MEANINGFUL TRAVEL EXPERIENCES

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences?
(Select one)

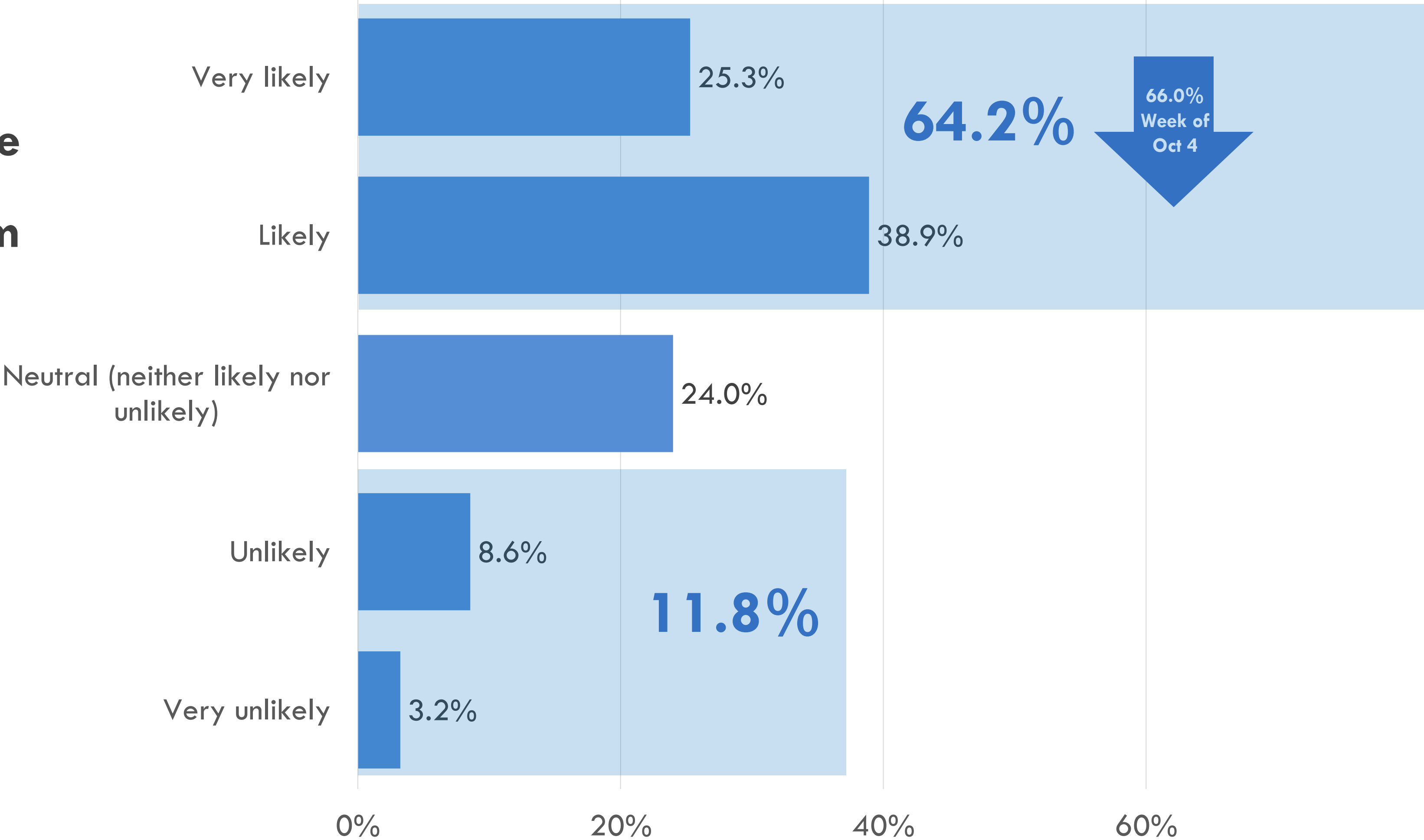
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



LIKELIHOOD THAT COVID-19 WILL BE WITH US IN THE LONGER-TERM

Question: In your opinion, how likely is it that the COVID-19 issue will be with us for the longer-term (i.e., at least the next several years)? (Select one)

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)





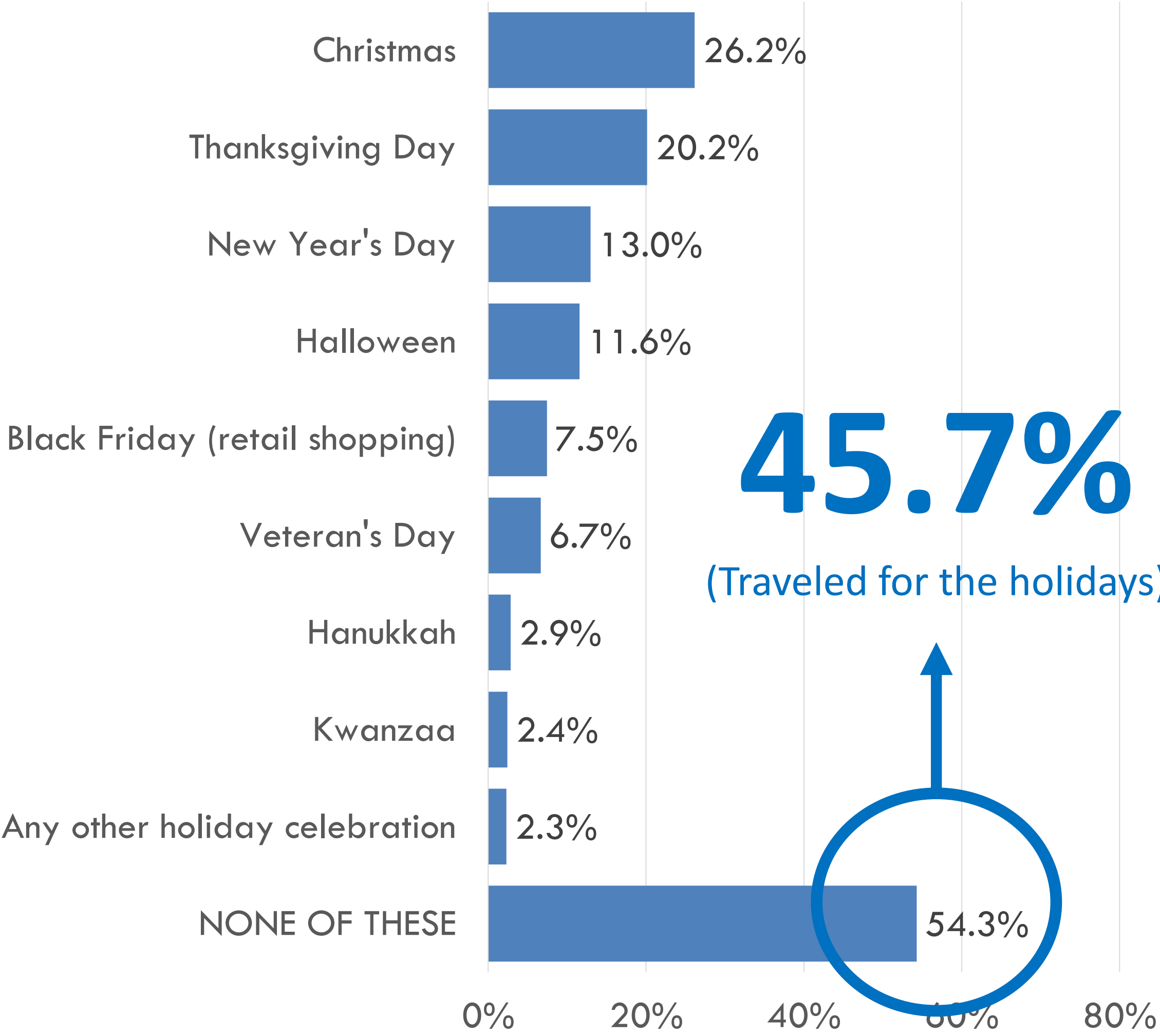
HOLIDAY TRAVEL

TRAVEL DURING THE HOLIDAYS: LAST YEAR

Question: Tell us about your holiday season travel LAST YEAR (the 2020 Holiday season)

Did you travel (50 miles or more from your home) to celebrate/participate in any of the following LAST YEAR?

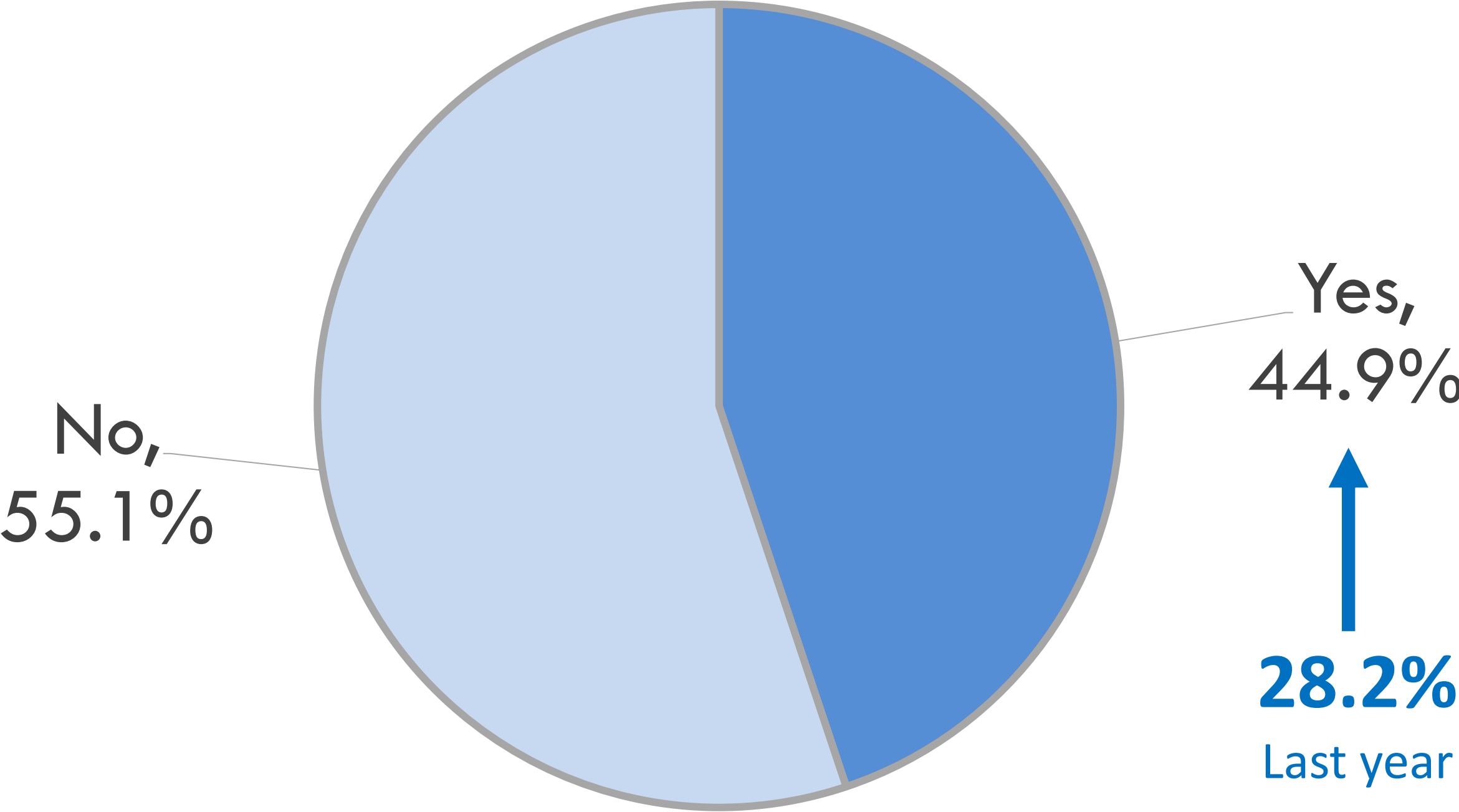
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



TRAVEL PLANS IN THE HOLIDAY SEASON: THIS YEAR

Question: Do you have any travel plans (even if tentative) for the holiday season this year?

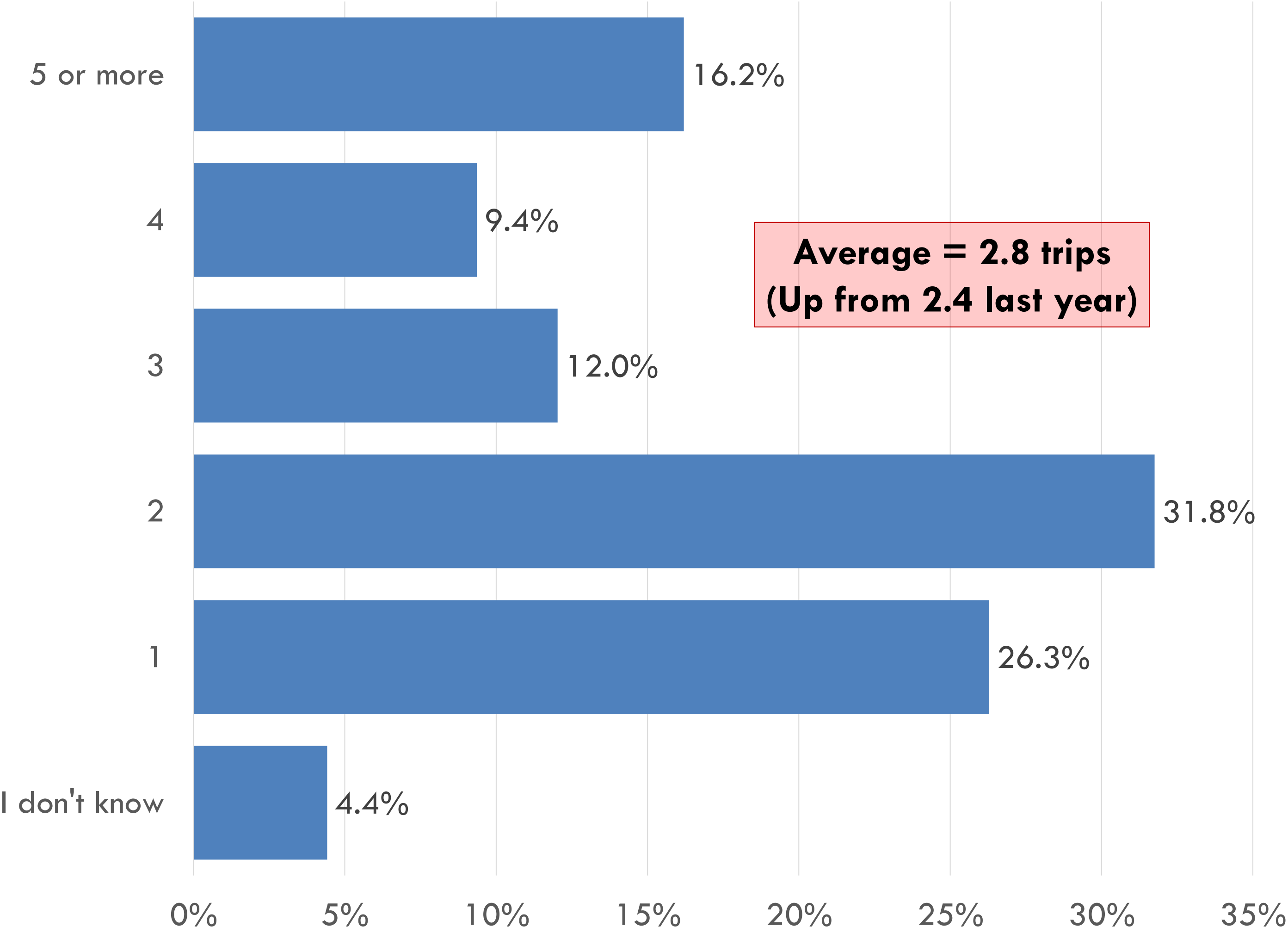
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



NUMBER OF HOLIDAY TRIPS THIS HOLIDAY SEASON

Question: How many trips (of 50 miles or more from your home) will you take this year to participate in/celebrate these holiday season events? (Select one)

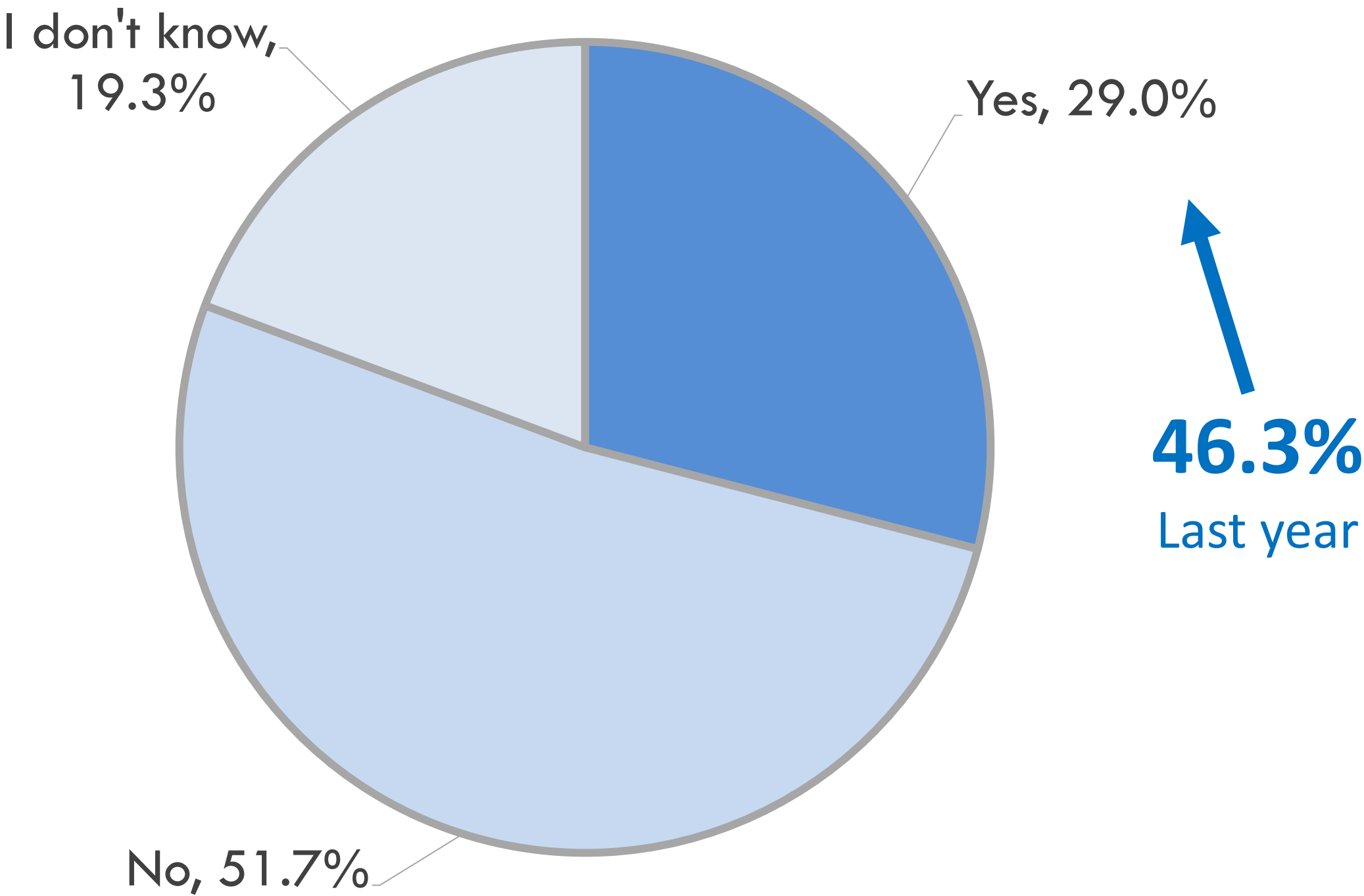
(Base: Wave 76 data. All respondents planning to travel for the holidays, 515 completed surveys. Data collected October 13-15, 2021)



LIKELIHOOD OF SKIPPING HOLIDAY MEALS DUE TO COVID-19

Question: Will you (or any of your friends or family) be likely to skip any HOLIDAY SEASON DINNER GATHERINGS due to Coronavirus safety concerns?

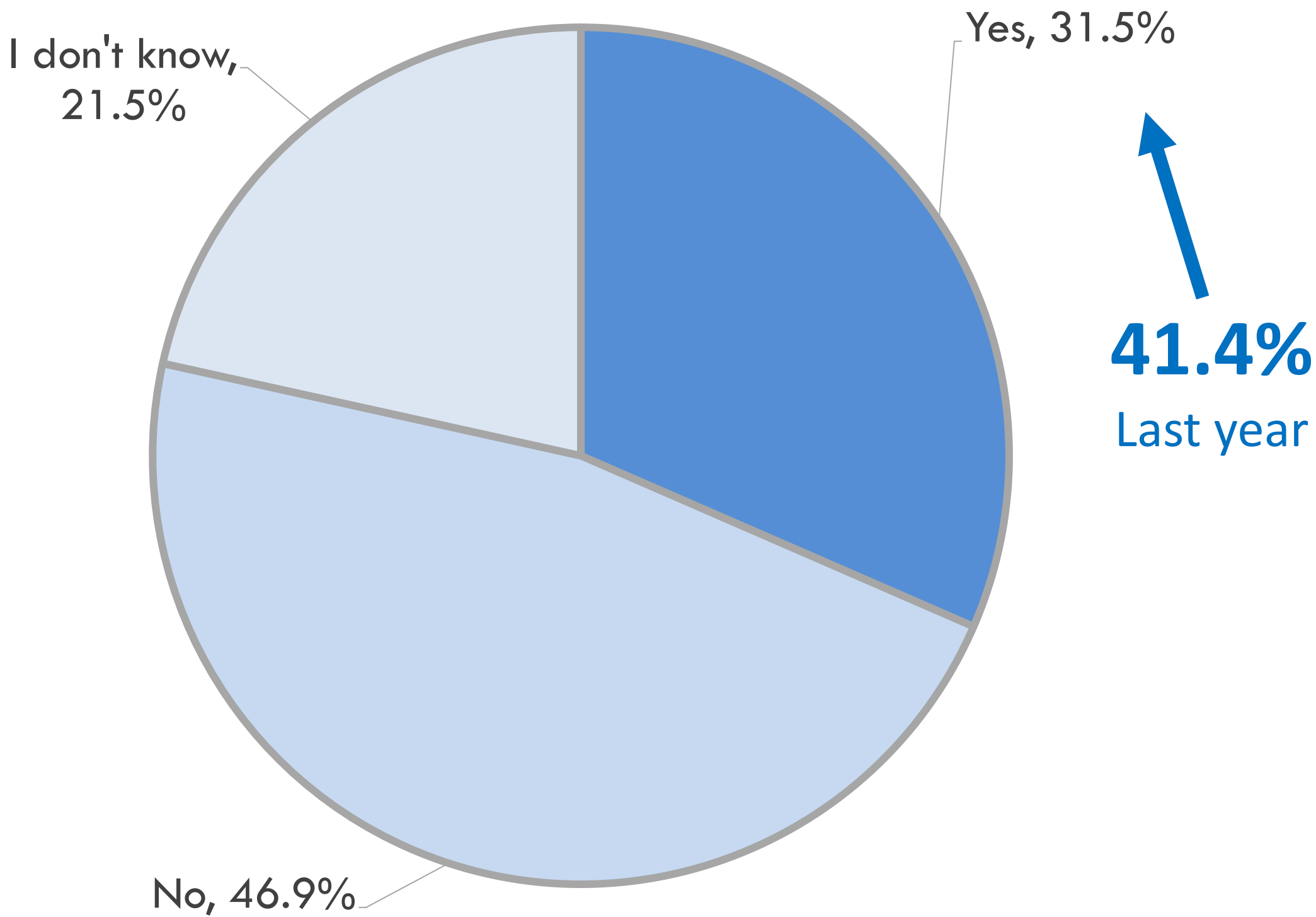
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



FRIENDS/RELATIVES NOT TRAVELING DURING THE HOLIDAYS

Question: Do you have any friends or family members who would normally travel during the holidays, but will not this year due to the Coronavirus situation?

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)

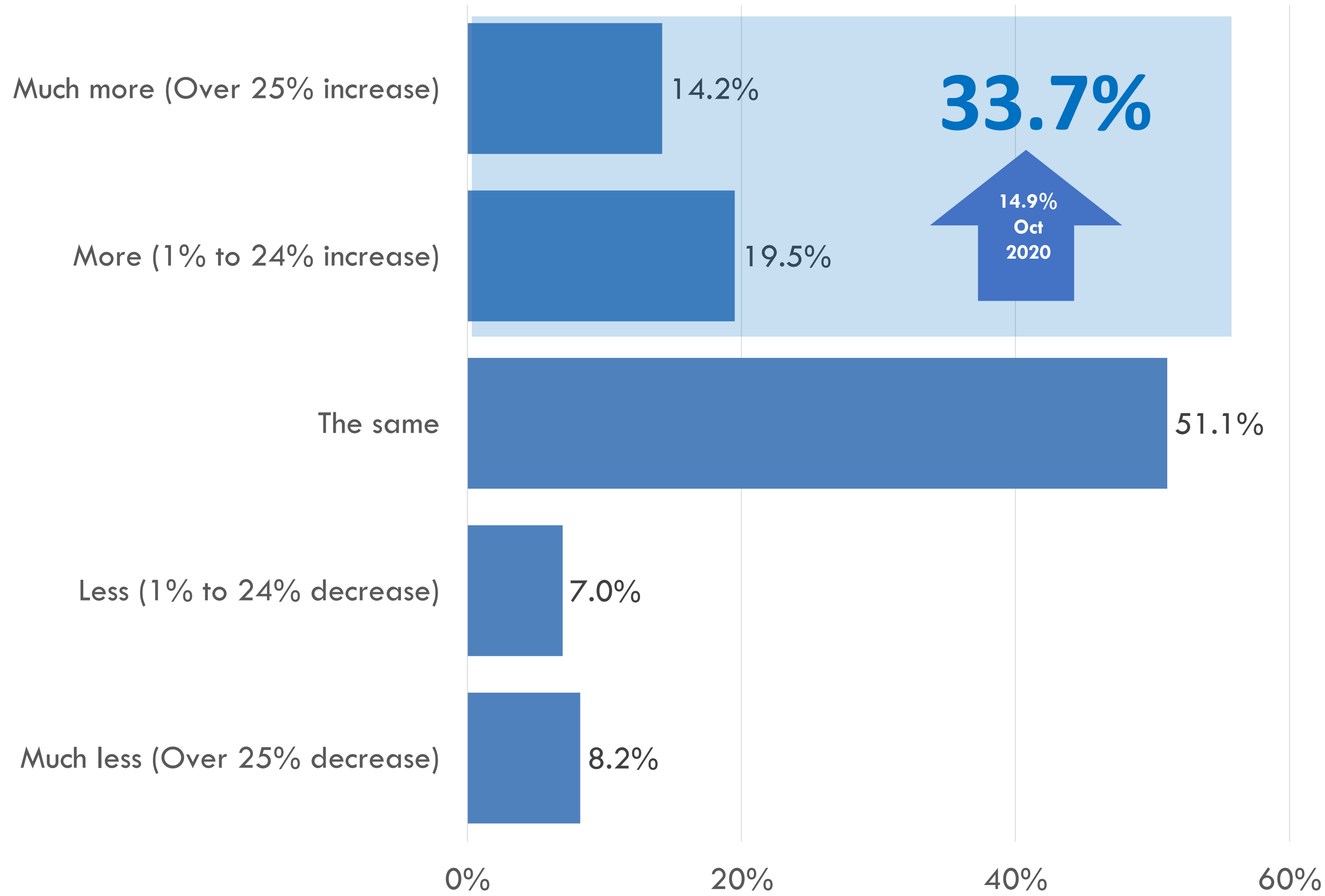


SPENDING ON HOLIDAY TRAVEL

Question: Compared to 2020, do you expect to spend more, less or the same for HOLIDAY TRAVEL this year?

I expect to spend _____ this year on holiday travel.

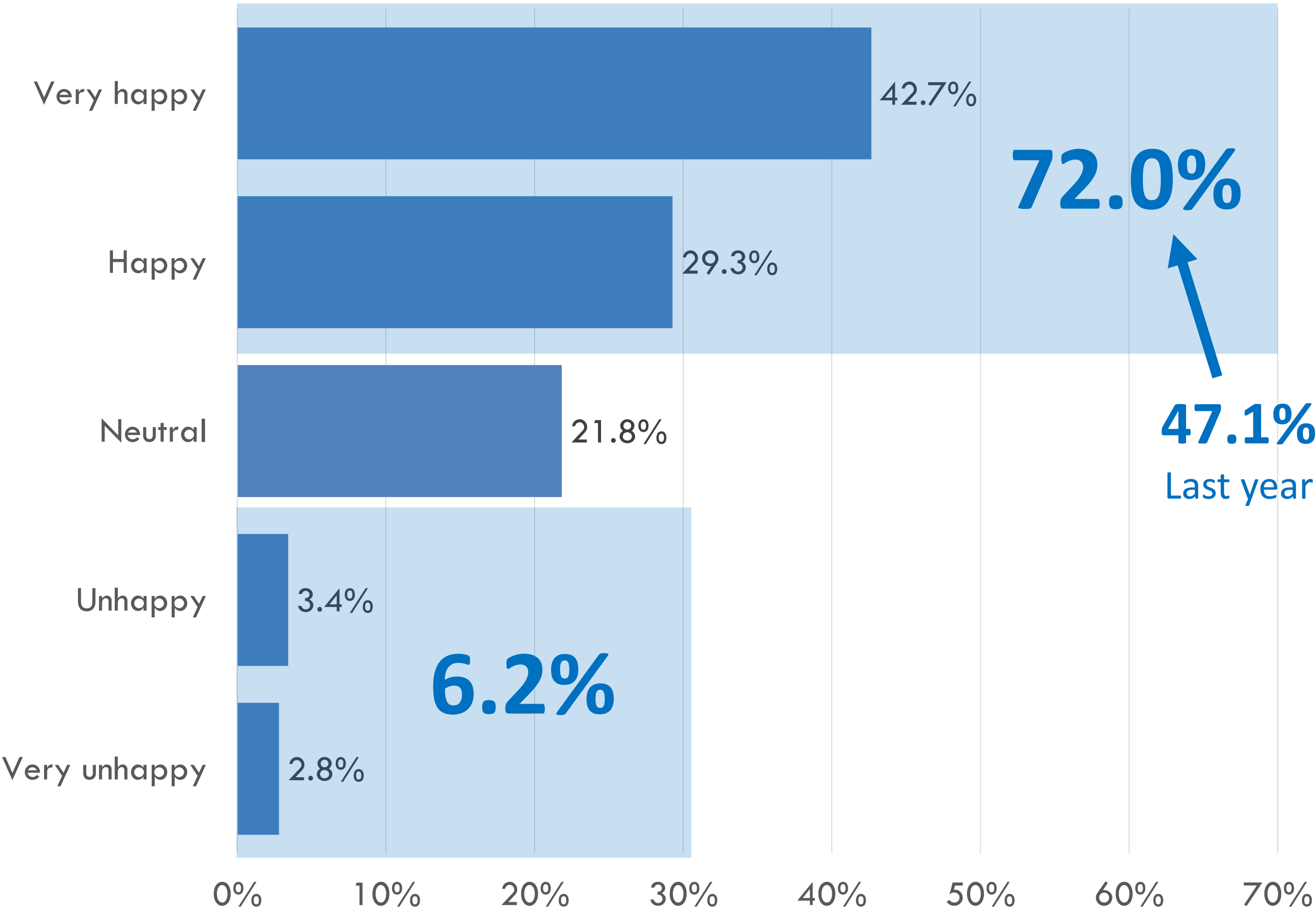
(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)



FEELINGS ABOUT TRAVEL-RELATED GIFTS

Question: How would you feel if you received a TRAVEL-RELATED GIFT for the holidays this season?
(Select one)

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)

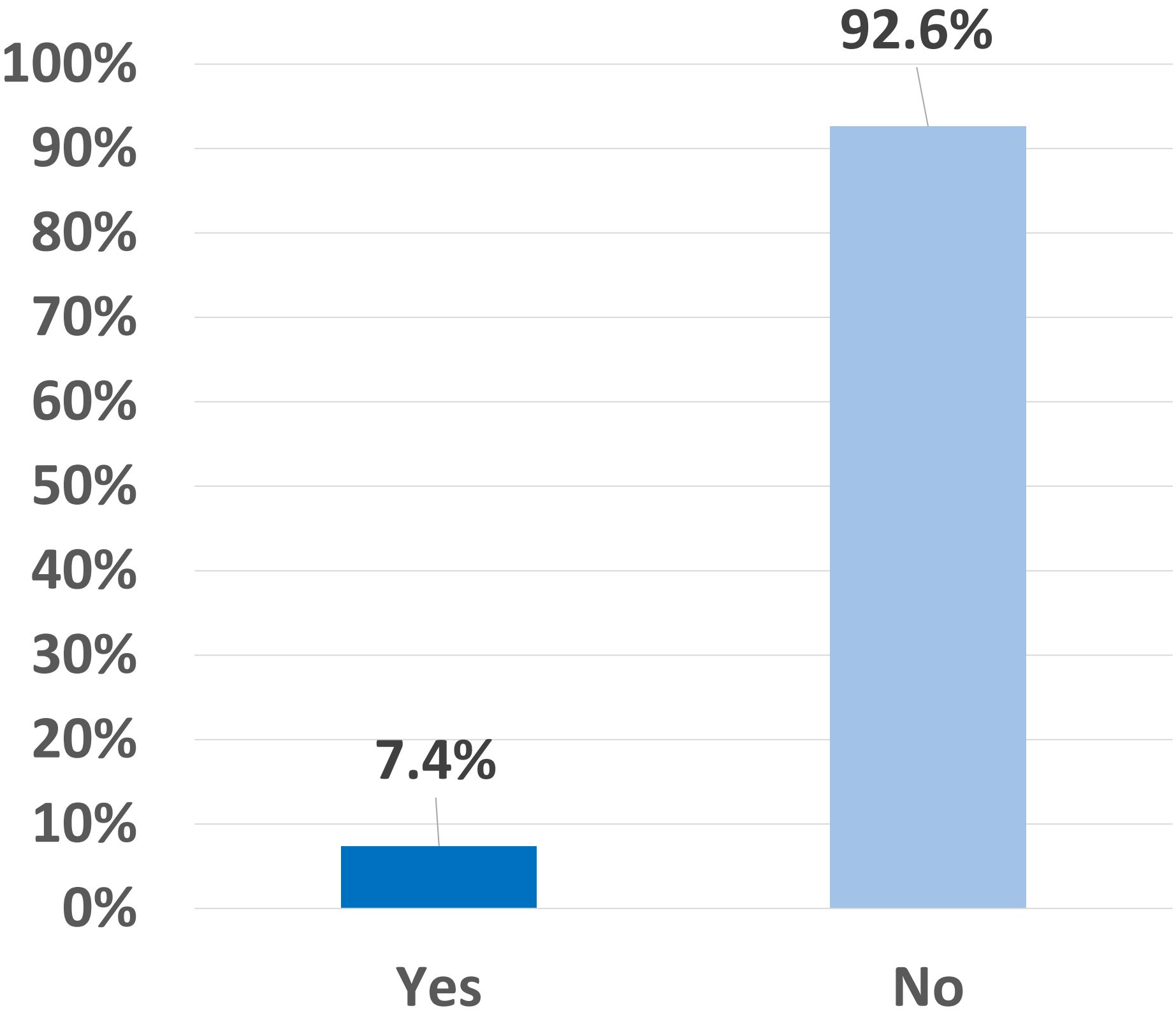




KANSAS' SITUATION

KANSAS: VISITATION

Question: Have you traveled to (or within) Kansas in the PAST THREE (3) YEARS?



KANSAS: VISITATION

Question: Have you traveled to (STATE) in the PAST THREE (3) YEARS?

1	Florida	32.5%
2	California	29.3%
3	New York	20.6%
4	Arizona	16.6%
5	Texas	16.4%
6	Alabama	16.3%
7	Georgia	16.1%
8	Nevada	14.3%
9	Colorado	14.1%
10	North Carolina	13.1%
11	Illinois	12.8%
12	Pennsylvania	12.6%
13	Tennessee	12.4%
14	New Jersey	11.5%
15	Hawaii	11.0%
16	Ohio	10.4%
17	Michigan	10.4%
18	Washington	10.3%

19	Indiana	10.3%
20	Virginia	10.3%
21	District of Columbia	10.2%
22	South Carolina	10.1%
23	Alaska	9.9%
24	Kentucky	9.5%
25	Maryland	9.5%
26	Massachusetts	9.4%
27	Louisiana	9.1%
28	Missouri	9.1%
29	Connecticut	8.9%
30	Arkansas	8.9%
31	Puerto Rico	8.7%
32	Wisconsin	7.5%
33	Kansas	7.4%
34	Minnesota	7.2%
35	Oregon	7.2%
36	Oklahoma	7.2%

37	Mississippi	7.2%
38	Iowa	7.0%
39	New Mexico	7.0%
40	Delaware	7.0%
41	Maine	6.7%
42	Utah	6.7%
43	Idaho	6.4%
44	West Virginia	6.3%
45	Montana	6.1%
46	New Hampshire	5.9%
47	Nebraska	5.5%
48	Wyoming	5.3%
49	Vermont	5.0%
50	South Dakota	5.0%
51	Rhode Island	4.9%
52	North Dakota	4.2%

KANSAS: VISITATION

Question: Are you likely to travel to (or within) Kansas in the **NEXT THREE (3) YEARS?**

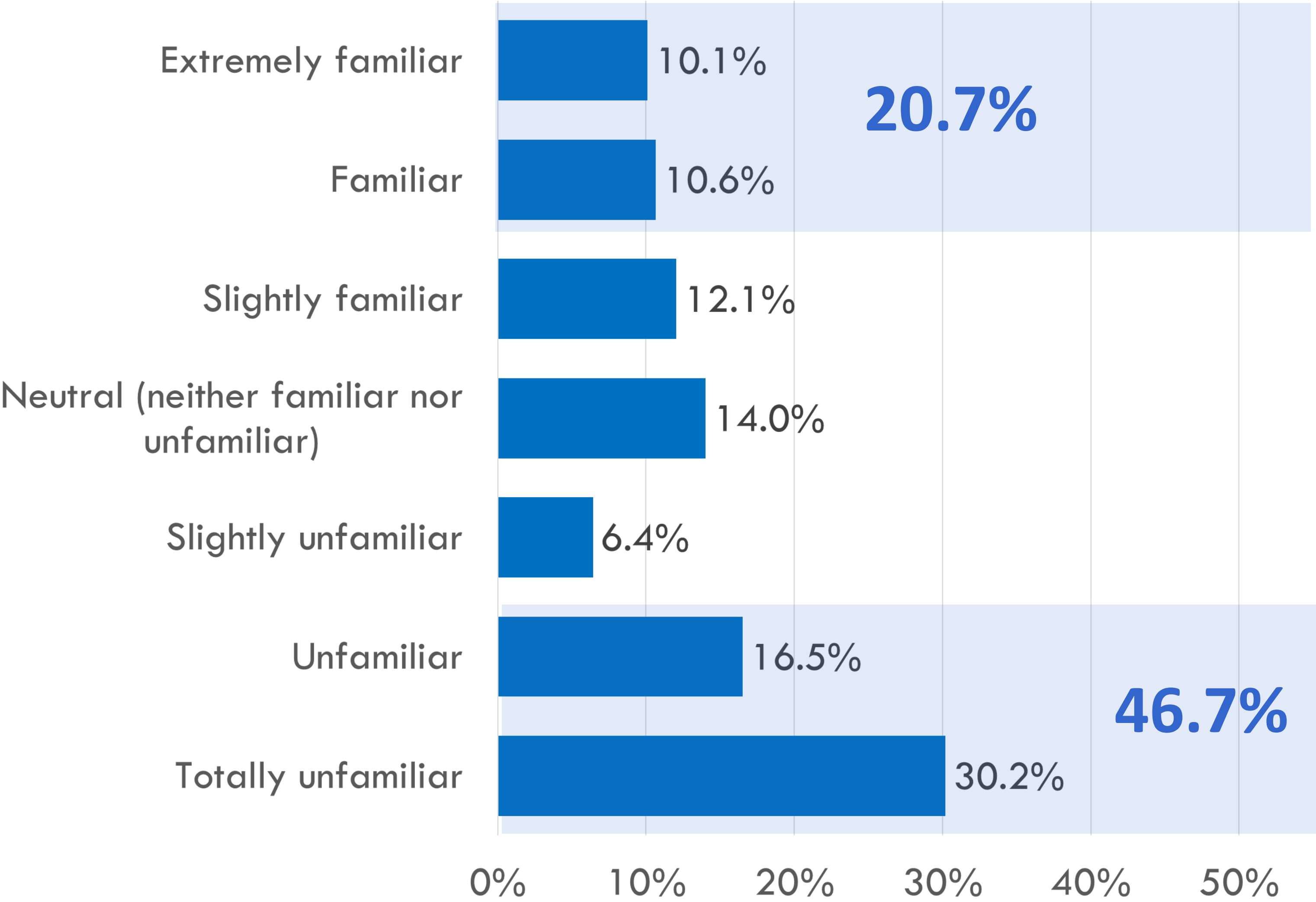
1	Florida	33.3%
2	California	28.3%
3	New York	21.3%
4	Colorado	20.8%
5	Hawaii	20.7%
6	Arizona	20.2%
7	Nevada	19.0%
8	Texas	18.1%
9	Alaska	17.6%
10	Georgia	16.9%
11	North Carolina	16.4%
12	Tennessee	16.1%
13	Illinois	16.0%
14	Puerto Rico	15.1%
15	Pennsylvania	15.0%
16	Massachusetts	14.3%
17	South Carolina	14.3%
18	Louisiana	14.1%

19	Alabama	14.0%
20	District of Columbia	13.9%
21	Maine	13.3%
22	New Jersey	13.3%
23	Michigan	13.3%
24	Virginia	13.2%
25	Indiana	13.1%
26	Arkansas	13.1%
27	Ohio	13.1%
28	Oregon	13.0%
29	Connecticut	13.0%
30	Kentucky	13.0%
31	Washington	12.9%
32	Maryland	12.7%
33	Missouri	12.3%
34	Montana	12.2%
35	Idaho	12.0%
36	Wisconsin	11.9%

37	Utah	11.9%
38	Delaware	11.9%
39	Minnesota	11.9%
40	New Mexico	11.7%
41	Iowa	11.5%
42	New Hampshire	11.3%
43	Wyoming	11.3%
44	Kansas	11.2%
45	Mississippi	10.7%
46	Oklahoma	10.6%
47	West Virginia	10.4%
48	Vermont	10.4%
49	South Dakota	10.3%
50	Nebraska	10.0%
51	Rhode Island	9.8%
52	North Dakota	9.6%

KANSAS: FAMILIARITY

Question: How familiar are you with the things for visitors to see and do in Kansas? (Select one)



DESCRIBING KANSAS

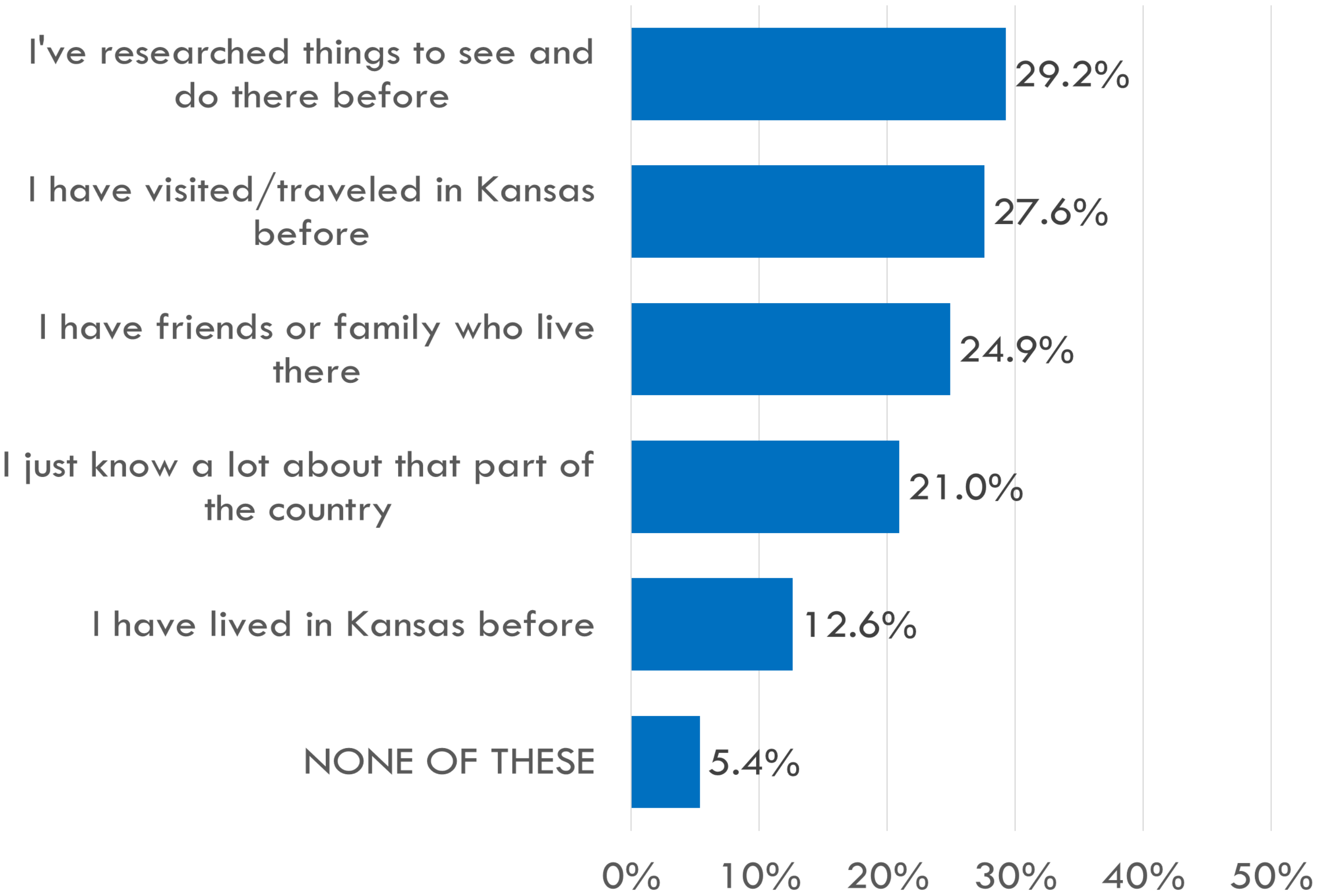
Question: What ONE WORD best describes Kansas?



HOW TRAVELERS LEARNED ABOUT KANSAS

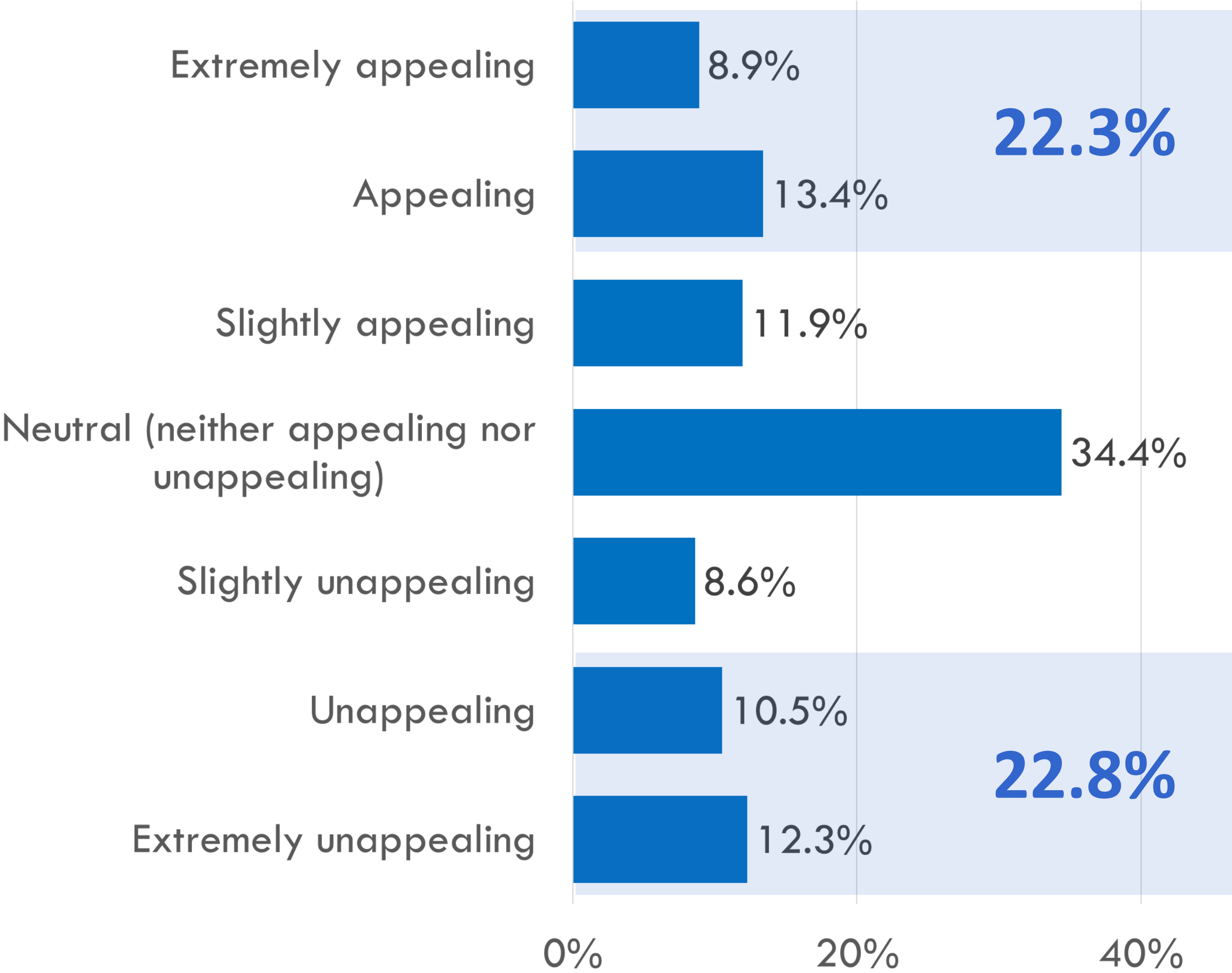
Question: How did you develop this level of familiarity with things for visitors to do in Kansas?
(Select all that apply)

Travelers with some familiarity with Kansas



KANSAS: DESTINATION APPEAL

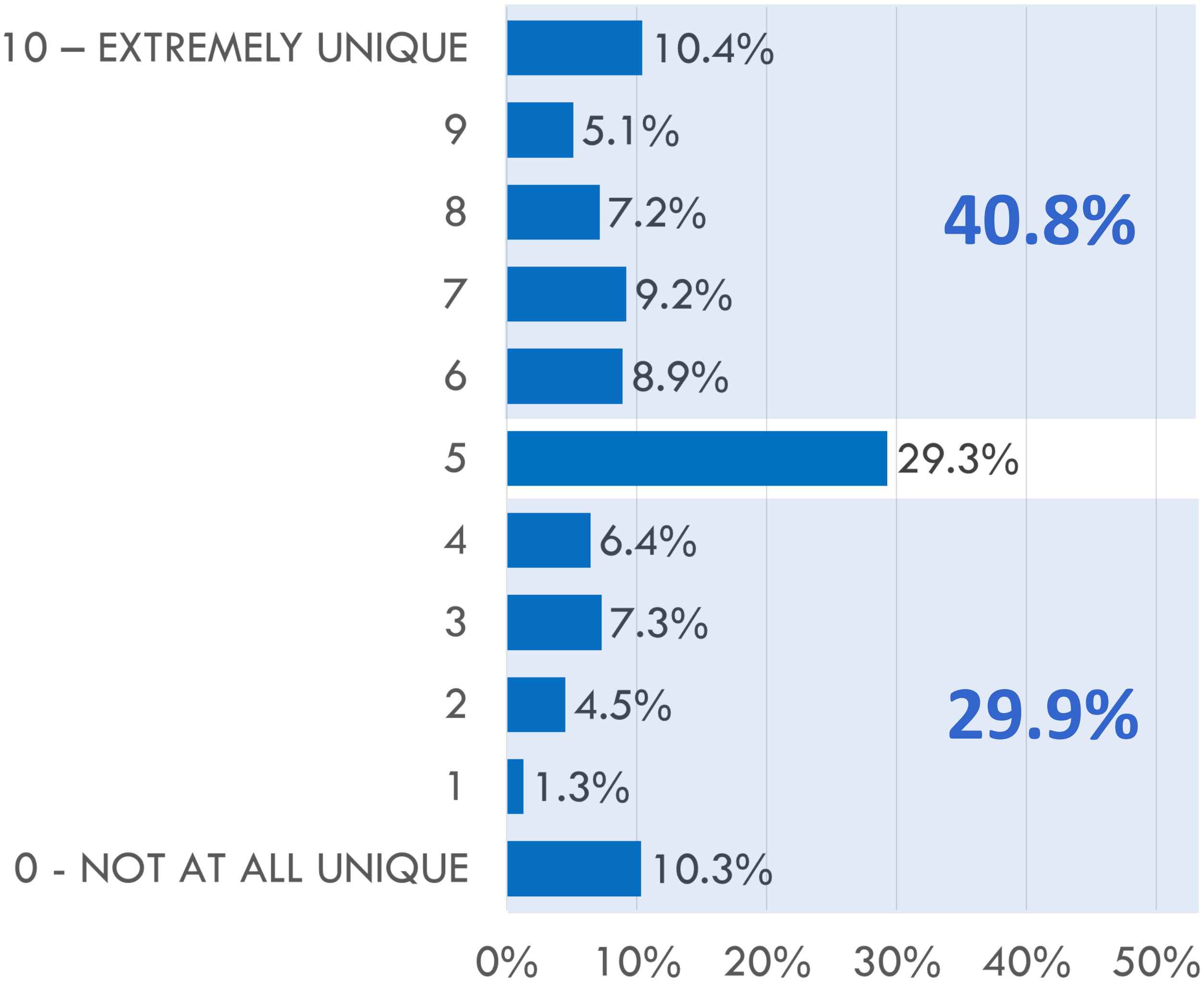
Question: In your opinion,
how appealing is Kansas
as a place to visit for
leisure travel? (Select one)



KANSAS: UNIQUENESS

Question: Please think about the experiences a traveler can have in and around Kansas and compare that to other destinations. Use the scale below to rate **HOW UNIQUE** these experiences are.

The experiences a visitor can have in Kansas are _____.



EXPERIENCES DESIRED IN KANSAS

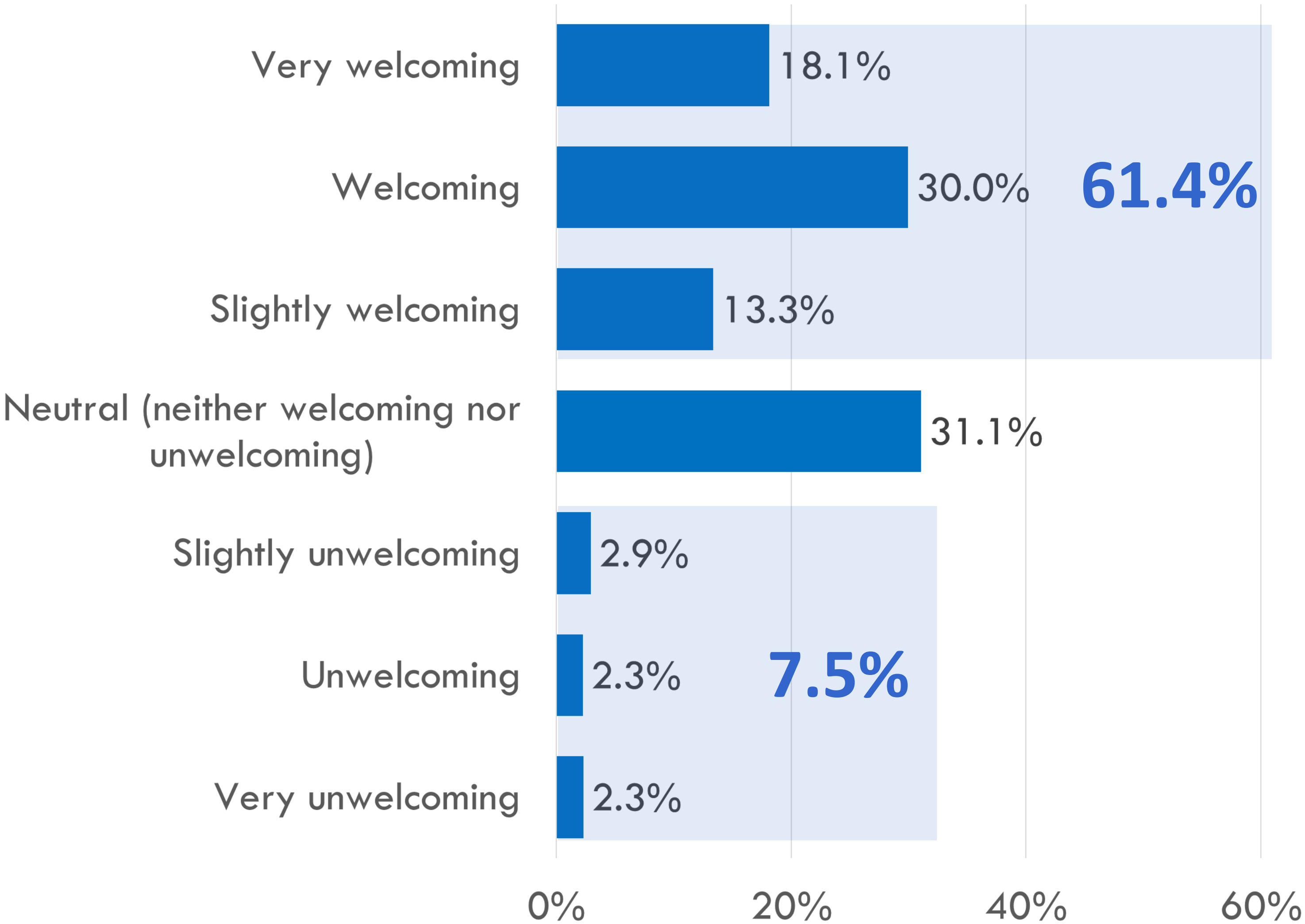
Question: If you were to visit Kansas, what experiences would you most want to have there?

Asked of travelers who are likely to visit Kansas



KANSAS: WELCOMING?

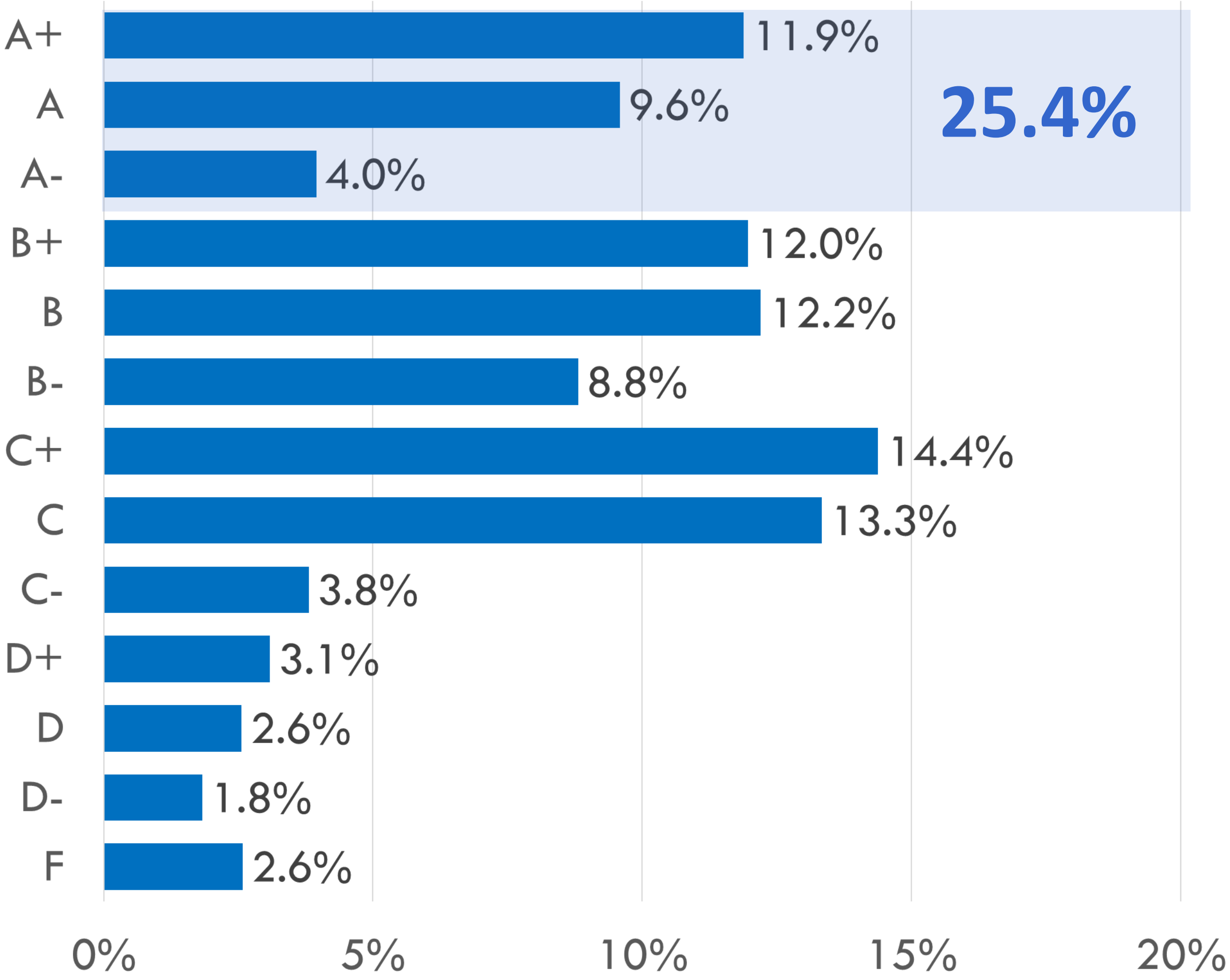
Question: Given what you know about Kansas, how welcoming would you expect the residents there to be to people like yourself? (Select one)





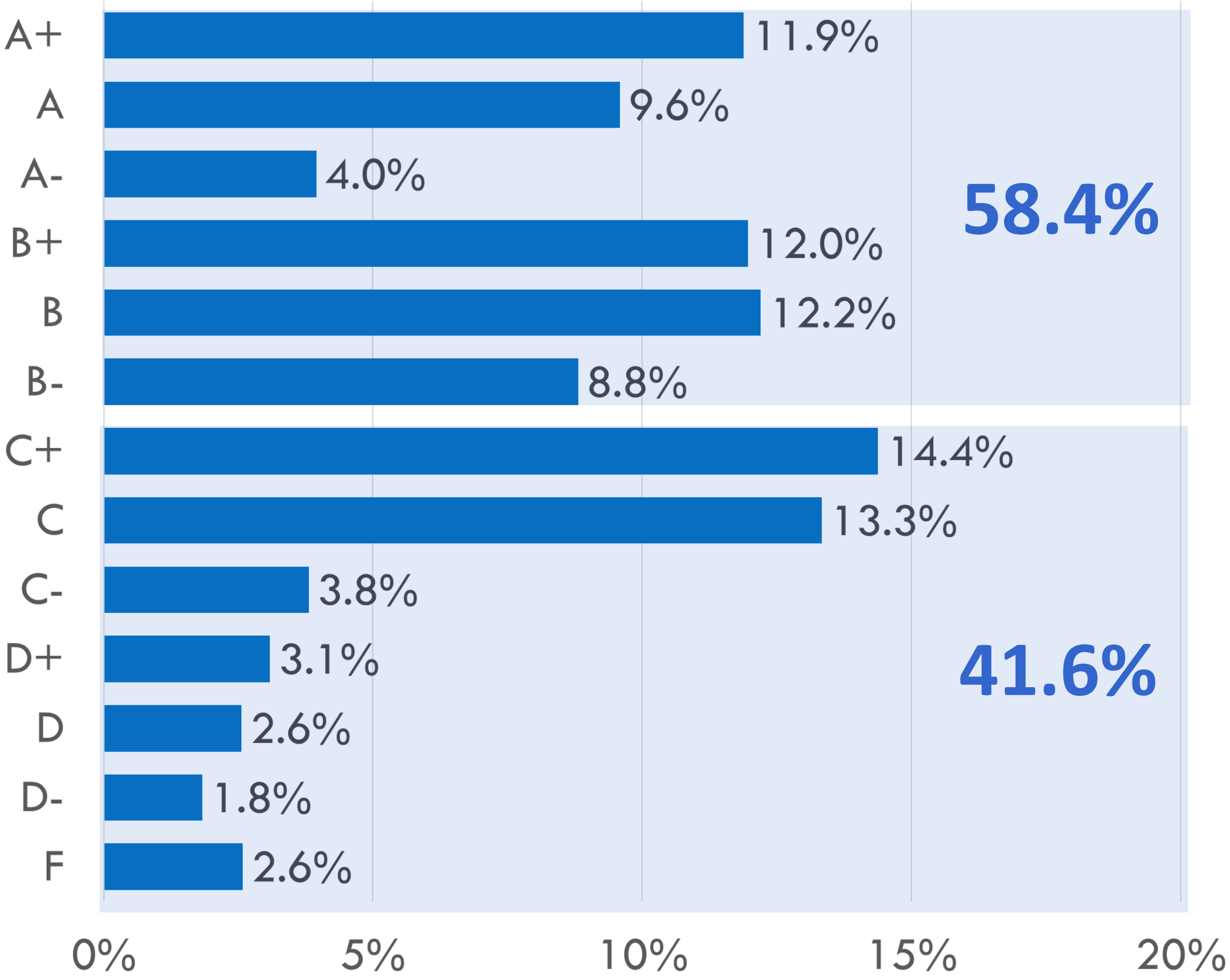
KANSAS: DESTINATION GRADE

Question: Using what you already know...If you were giving Kansas an overall grade as a tourist destination, what would it be?



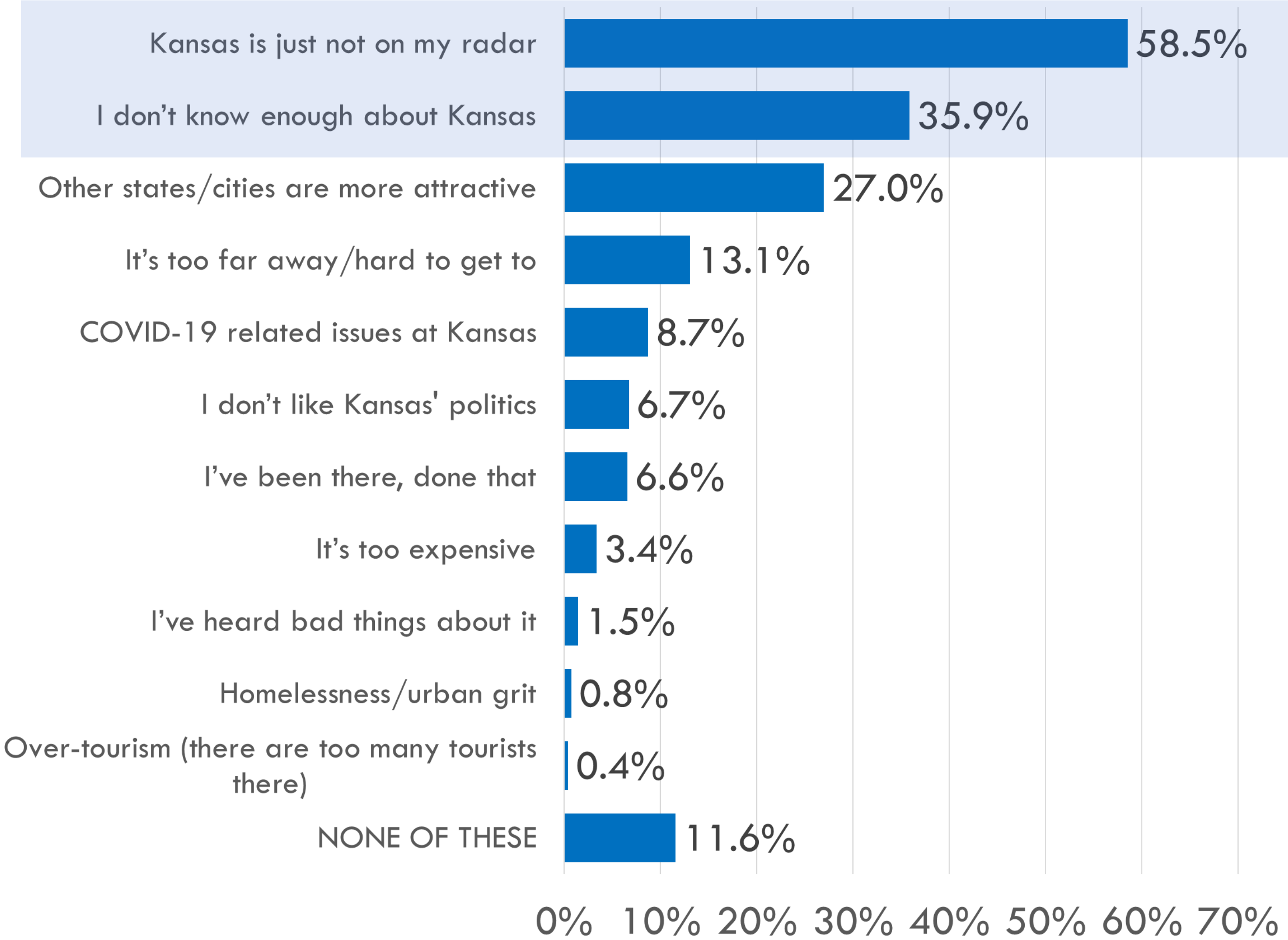
KANSAS: DESTINATION REPORT CARD

Question: Using what you already know...If you were giving Kansas an overall grade as a tourist destination, what would it be?



KANSAS: IMPEDIMENTS TO VISITATION

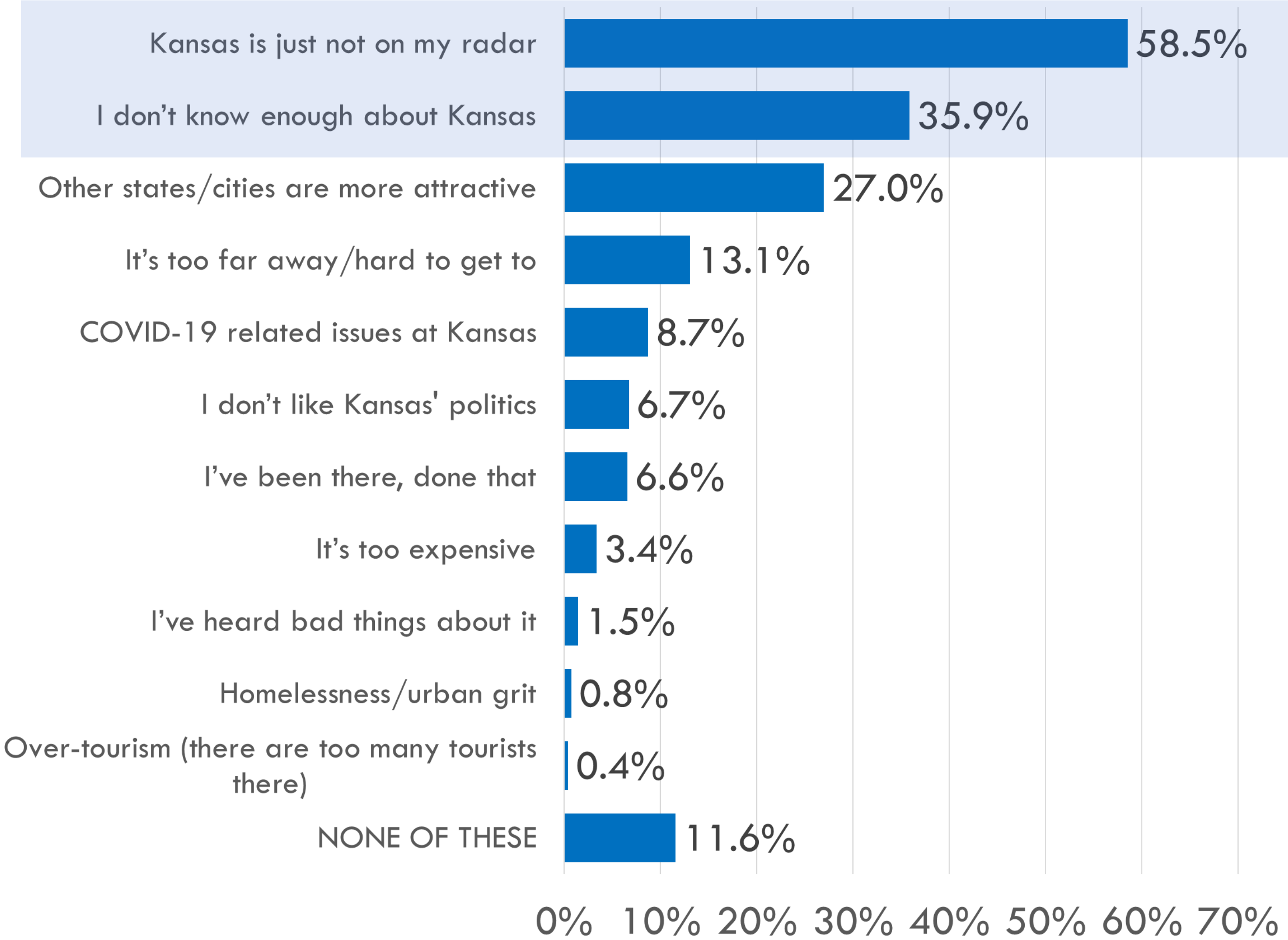
Question: Which of the following accurately describe why you said you're unlikely to visit Kansas in the NEXT THREE 3 YEARS? (Select all that apply)





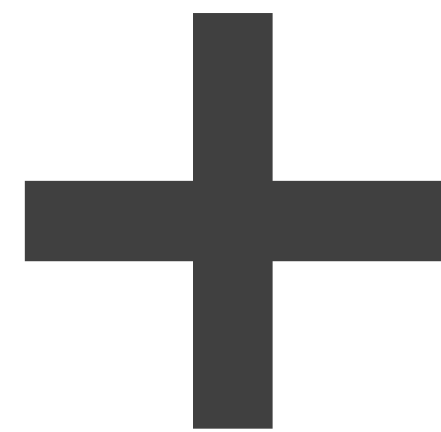
KANSAS: IMPEDIMENTS TO VISITATION

Question: Which of the following accurately describe why you said you're unlikely to visit Kansas in the NEXT THREE 3 YEARS? (Select all that apply)



Kansas-Oriented Travelers

Travelers who
*have traveled to (or
within)* Kansas in
the past 3 years



Travelers who are
*likely to travel to (or
within)* Kansas in the
next 3 years

16.1% of all American travelers

(1,365 sample size)

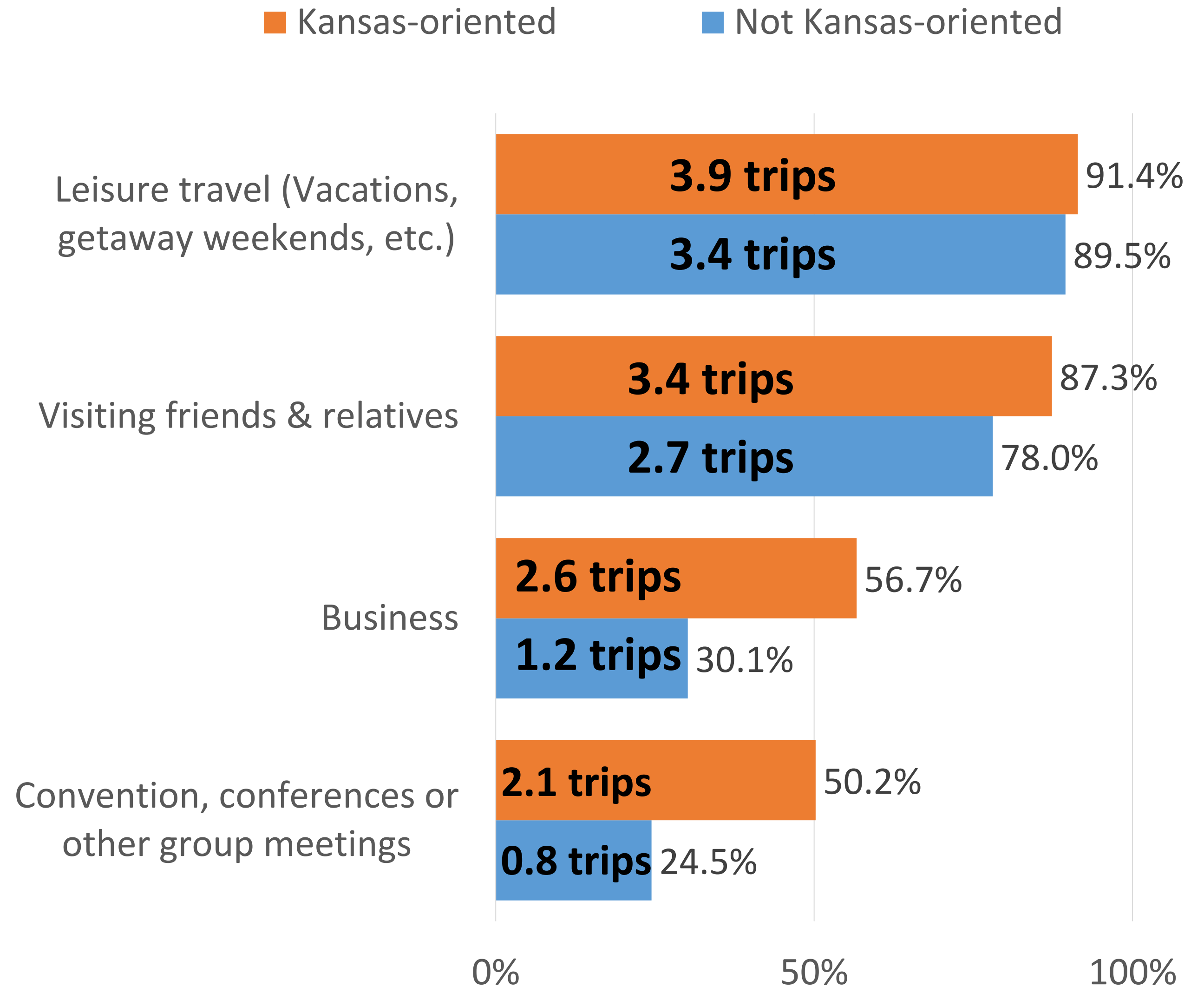
	Kansas -Oriented	Not Kansas-Oriented
Millennials or younger	61.8%	32.9%
Gen X	21.3%	26.0%
Boomer or older	17.0%	41.1%
Parent to school-aged children	50.2%	31.7%
Employed (full or part time)	83.2%	73.3%
Annual Household Income	\$94,622	\$89,013
Caucasian	71.4%	80.6%
Black/African America	12.2%	6.8%
Hispanic/Latino	7.3%	4.5%
Disabled or travels with a person with disabilities	26.0%	16.4%
LGBTQ	10.1%	6.4%
Very happy (with their lives)	49.4%	34.5%



Kansas-oriented Travelers

Frequent Travelers

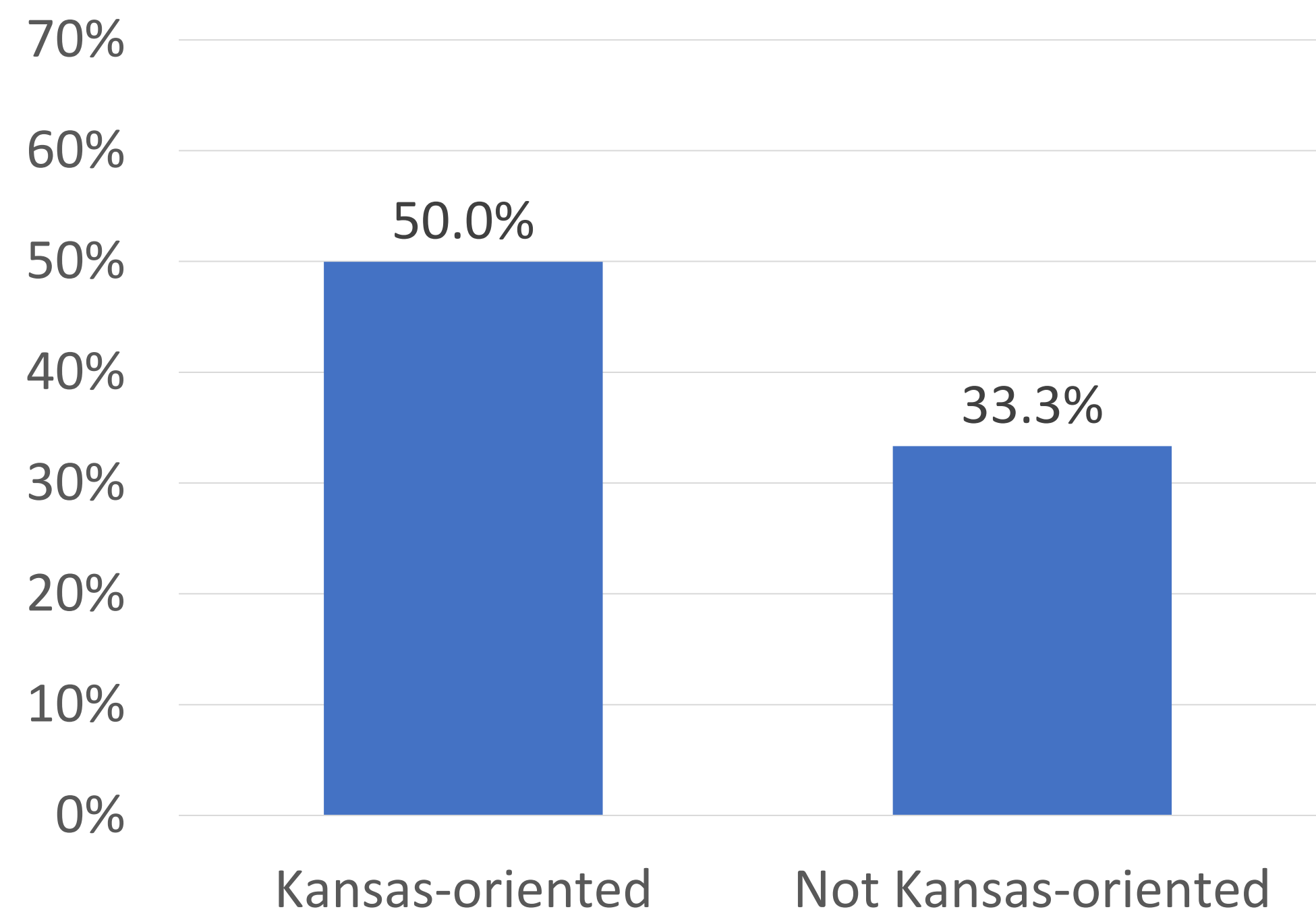
Trips taken in the PAST TWO (2) YEARS



KANSAS-ORIENTED TRAVELERS

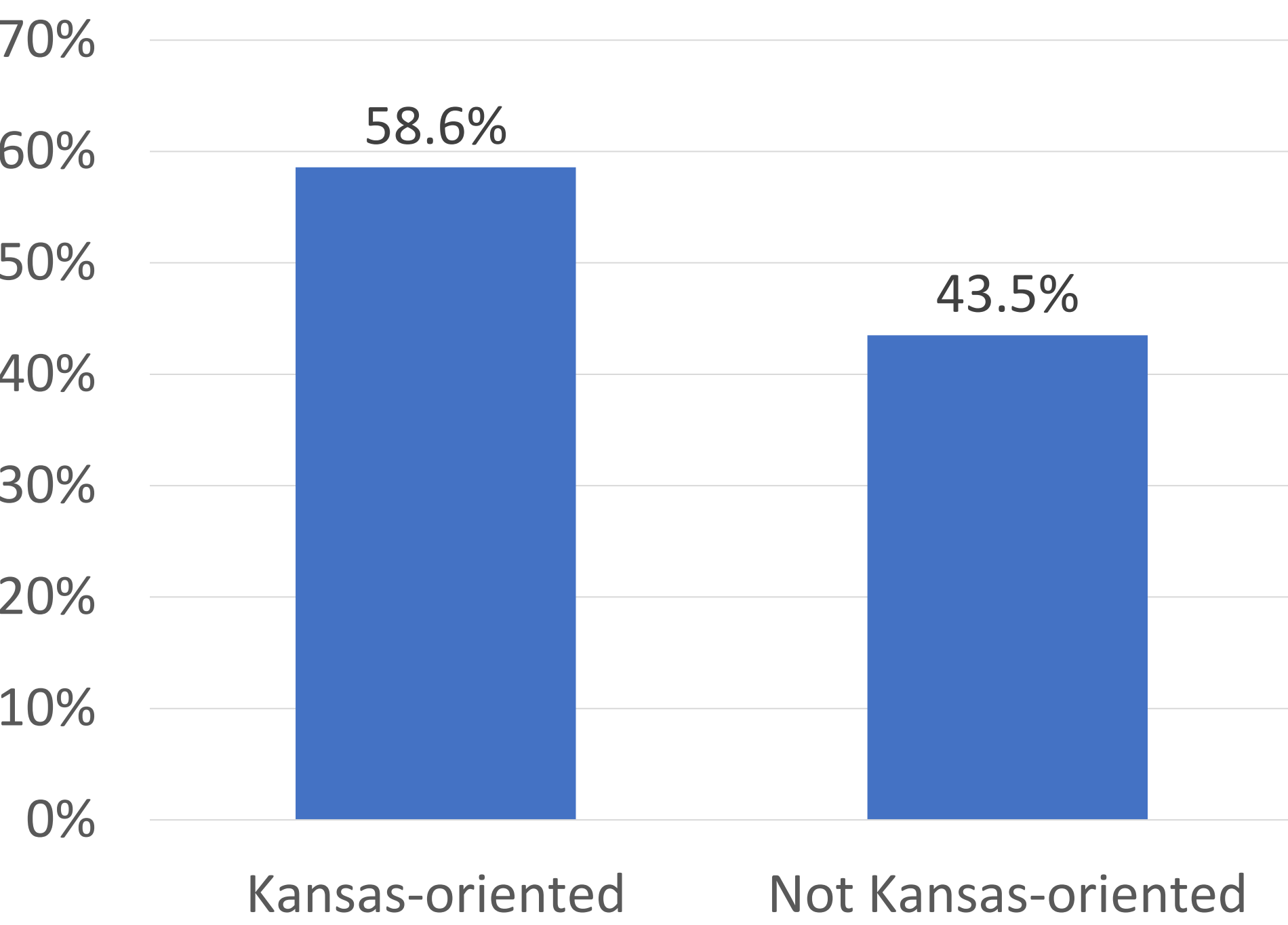
Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago? (Select one)

% Better off or Much better off



Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?

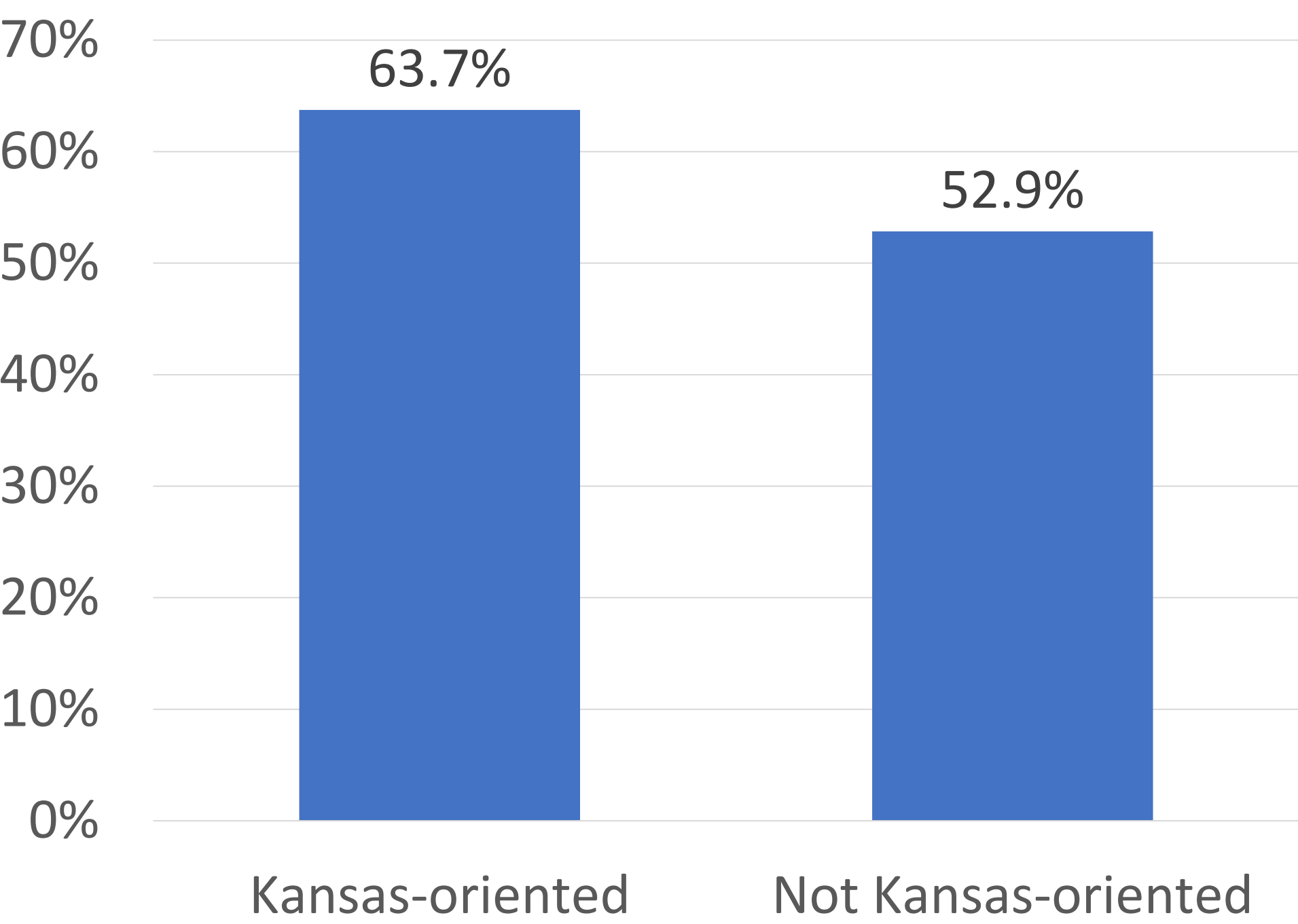
Expects to be better off or much better off



KANSAS-ORIENTED TRAVELERS

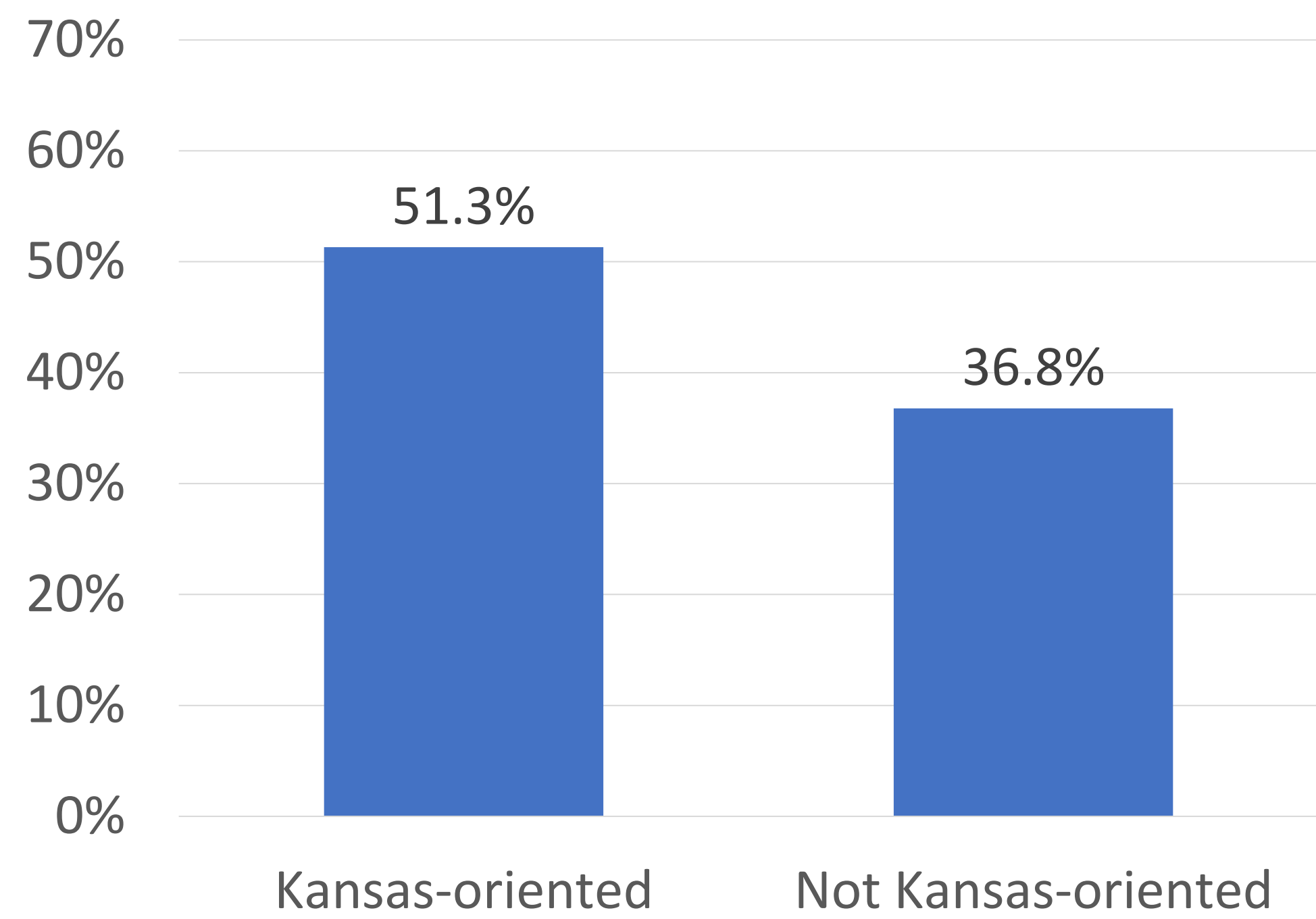
Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.

Leisure travel is a budget priority



Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

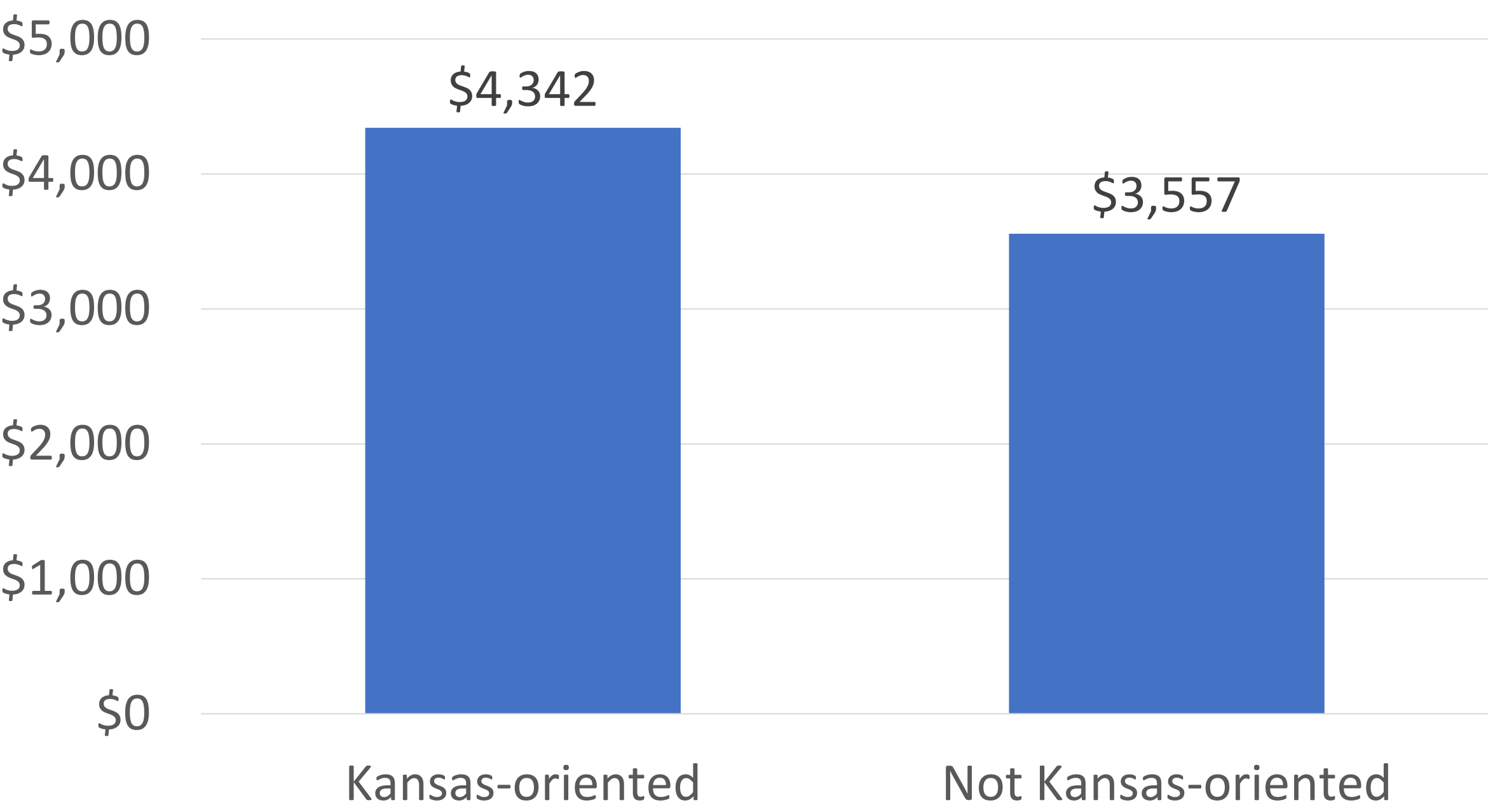
% Good time or Very good time



KANSAS-ORIENTED TRAVELERS

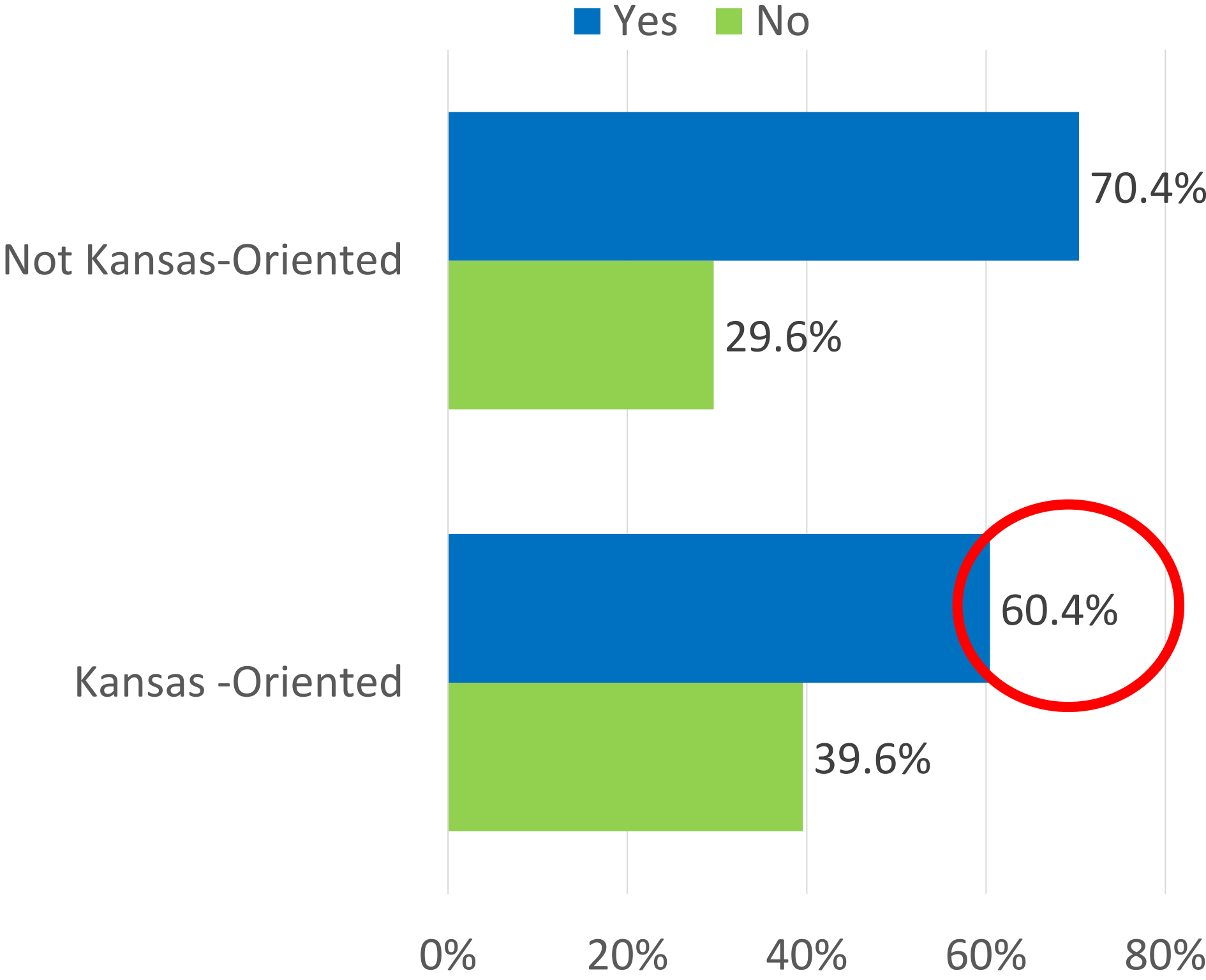
Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

Mean maximum expected spending

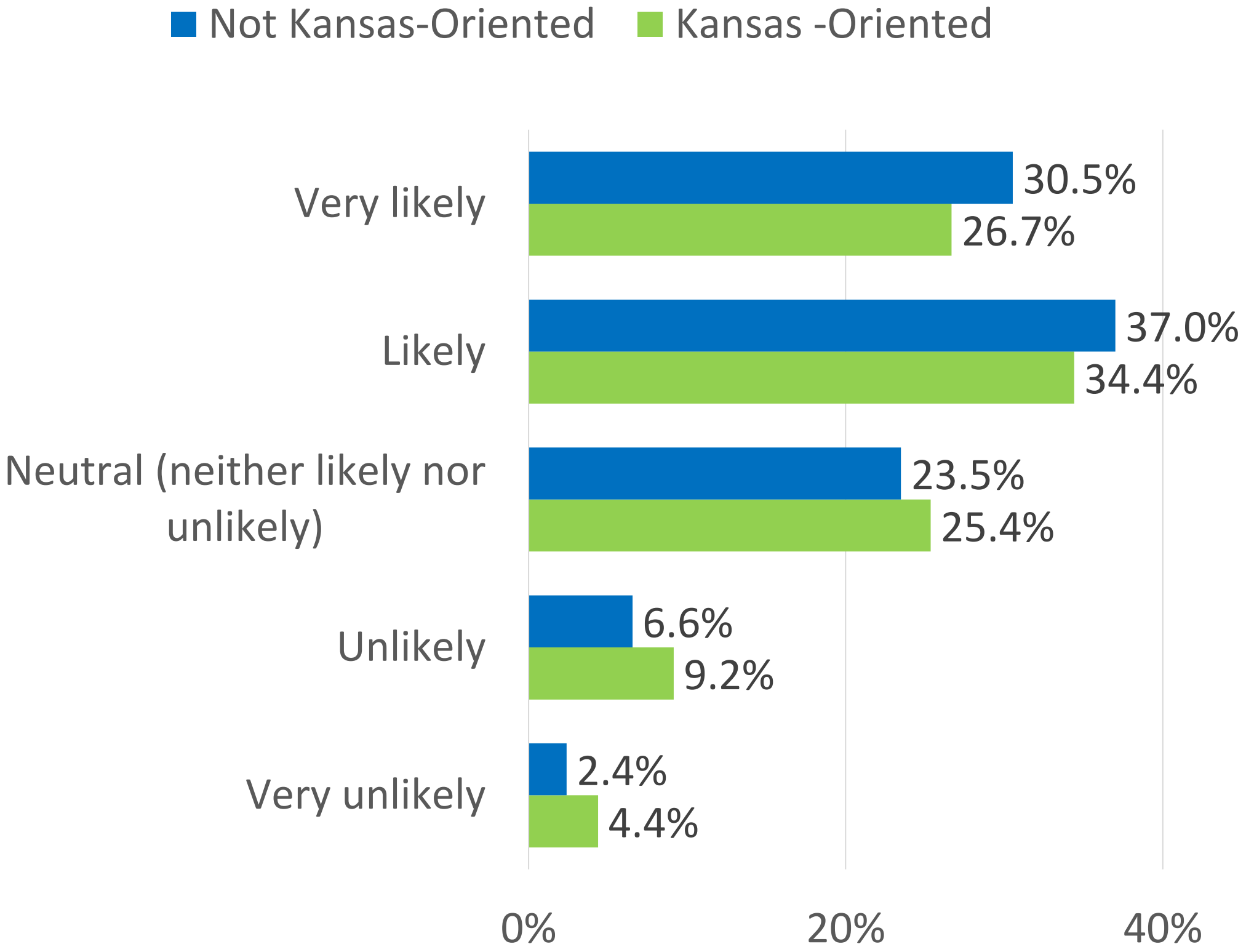


KANSAS-ORIENTED TRAVELERS & COVID-19

Question: Have you personally received a COVID-19 vaccine?



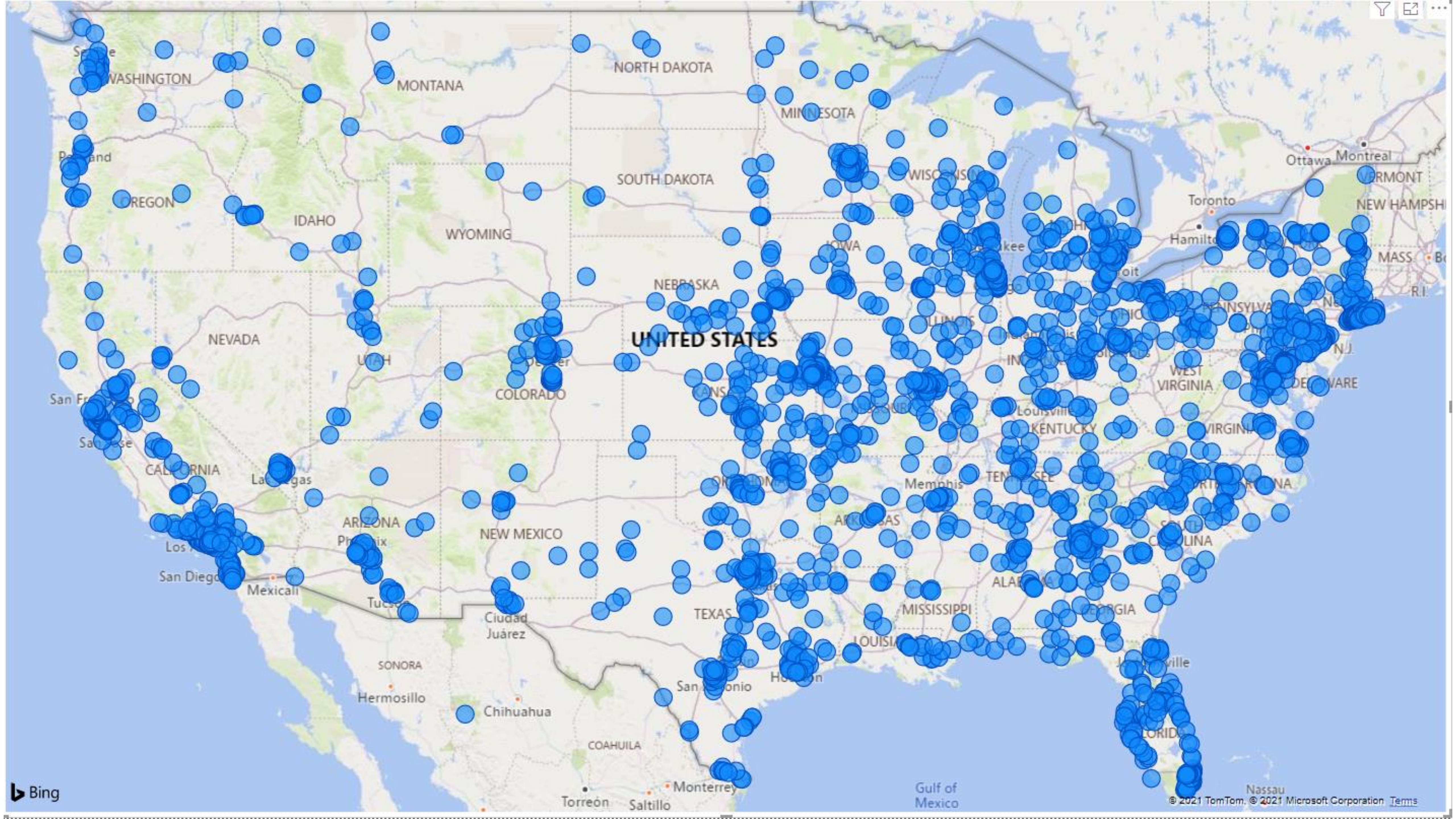
Question: In your opinion, how likely is it that the COVID-19 issue will be with us for the longer-term (i.e., at least the next several years)?



Kansas-oriented Travelers

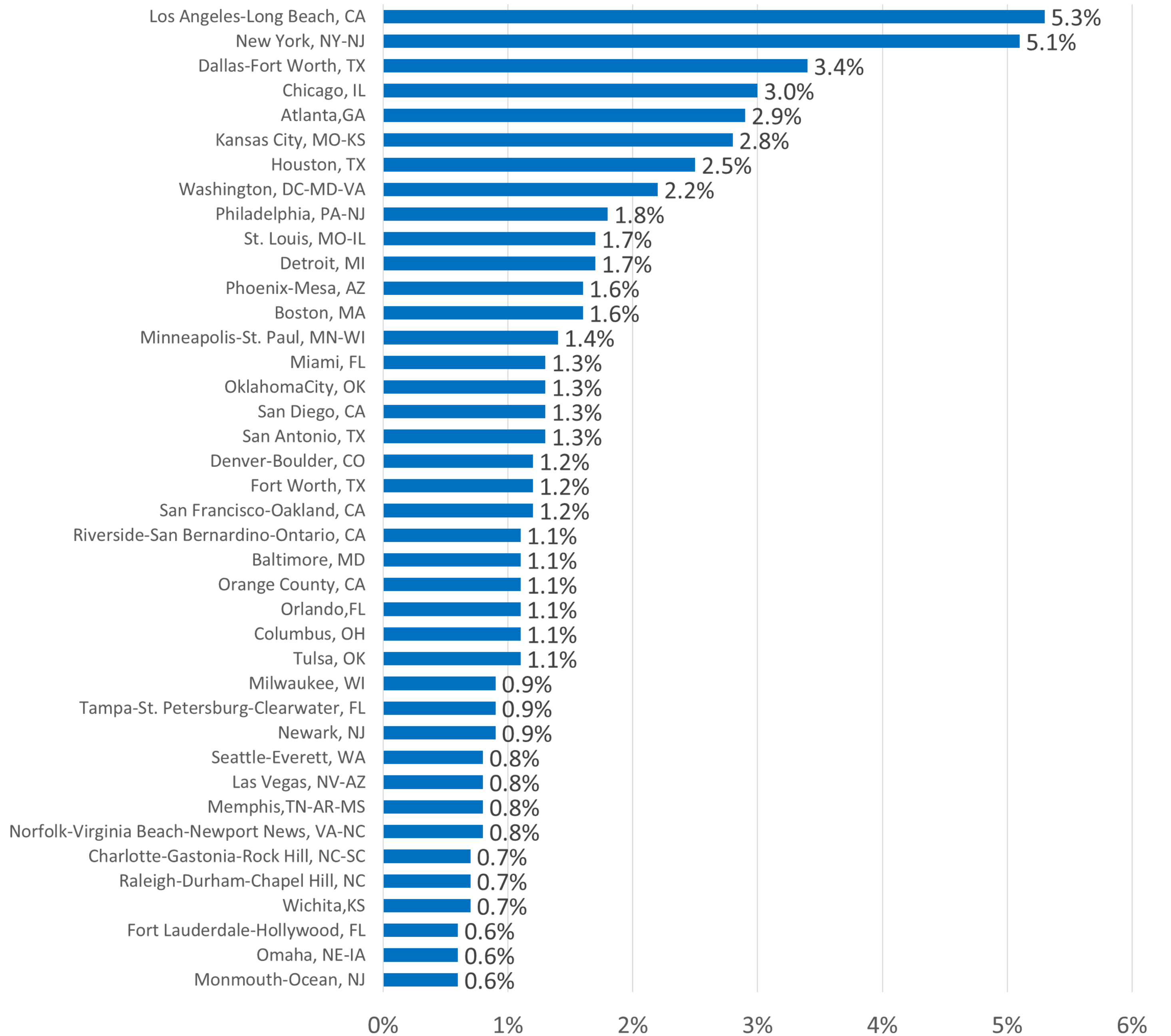
Where do they reside?





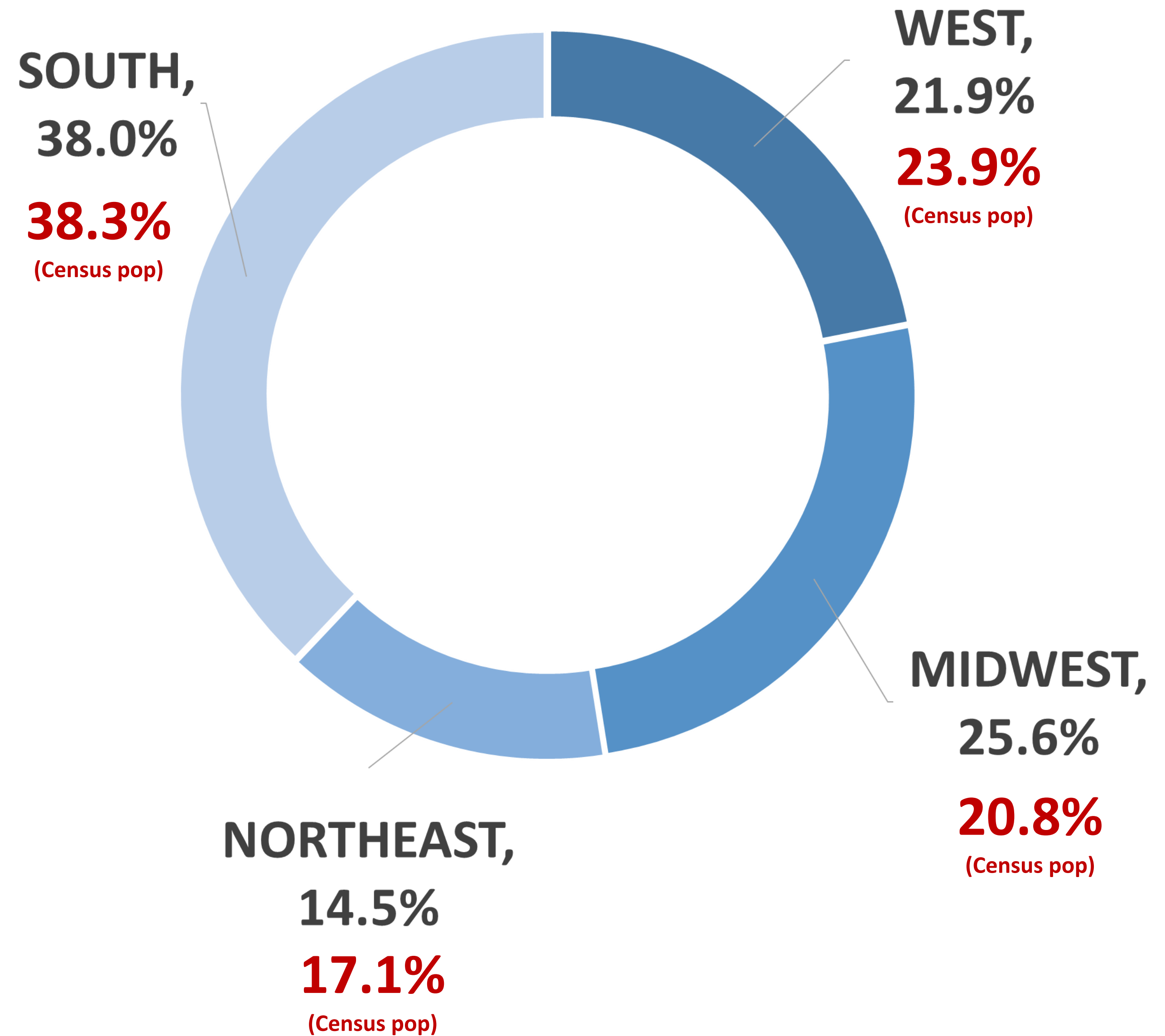
Kansas-oriented Travelers

Top 40 Markets



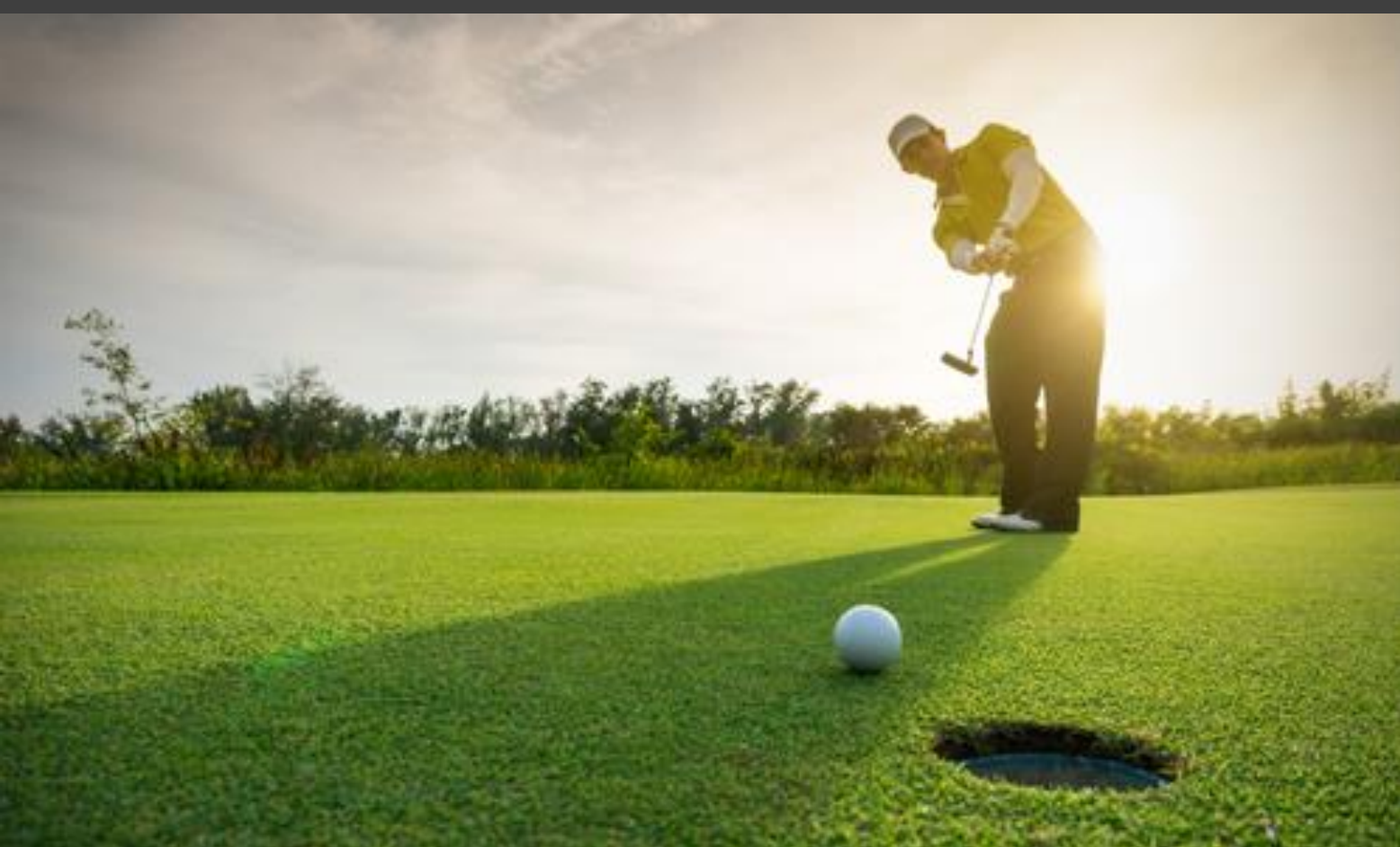
Kansas- oriented Travelers

*Where do they
reside?*





Tell us about your hobbies and passions.



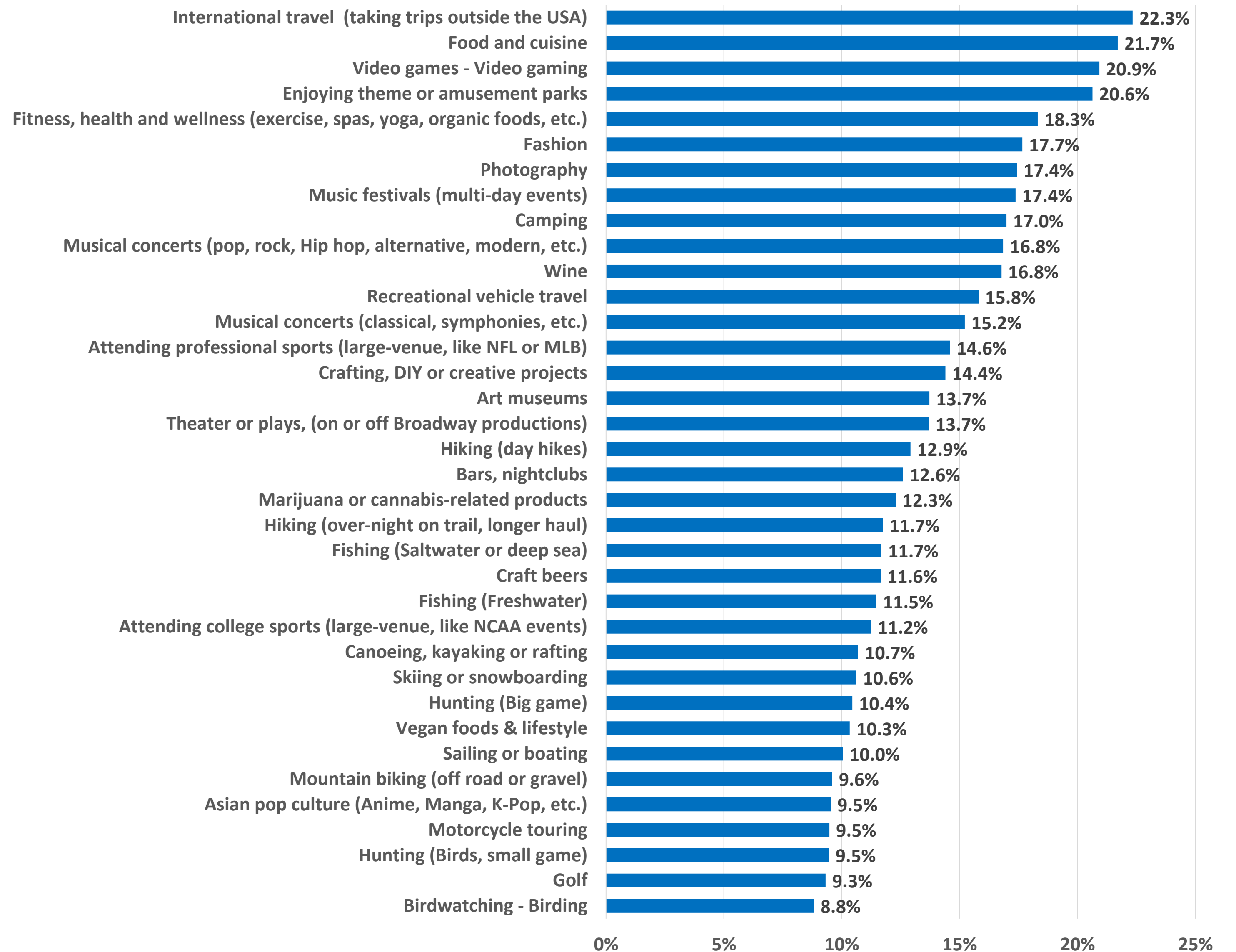
Please use the scale below to describe your interest in each.



Kansas-oriented Travelers

Travel Passions

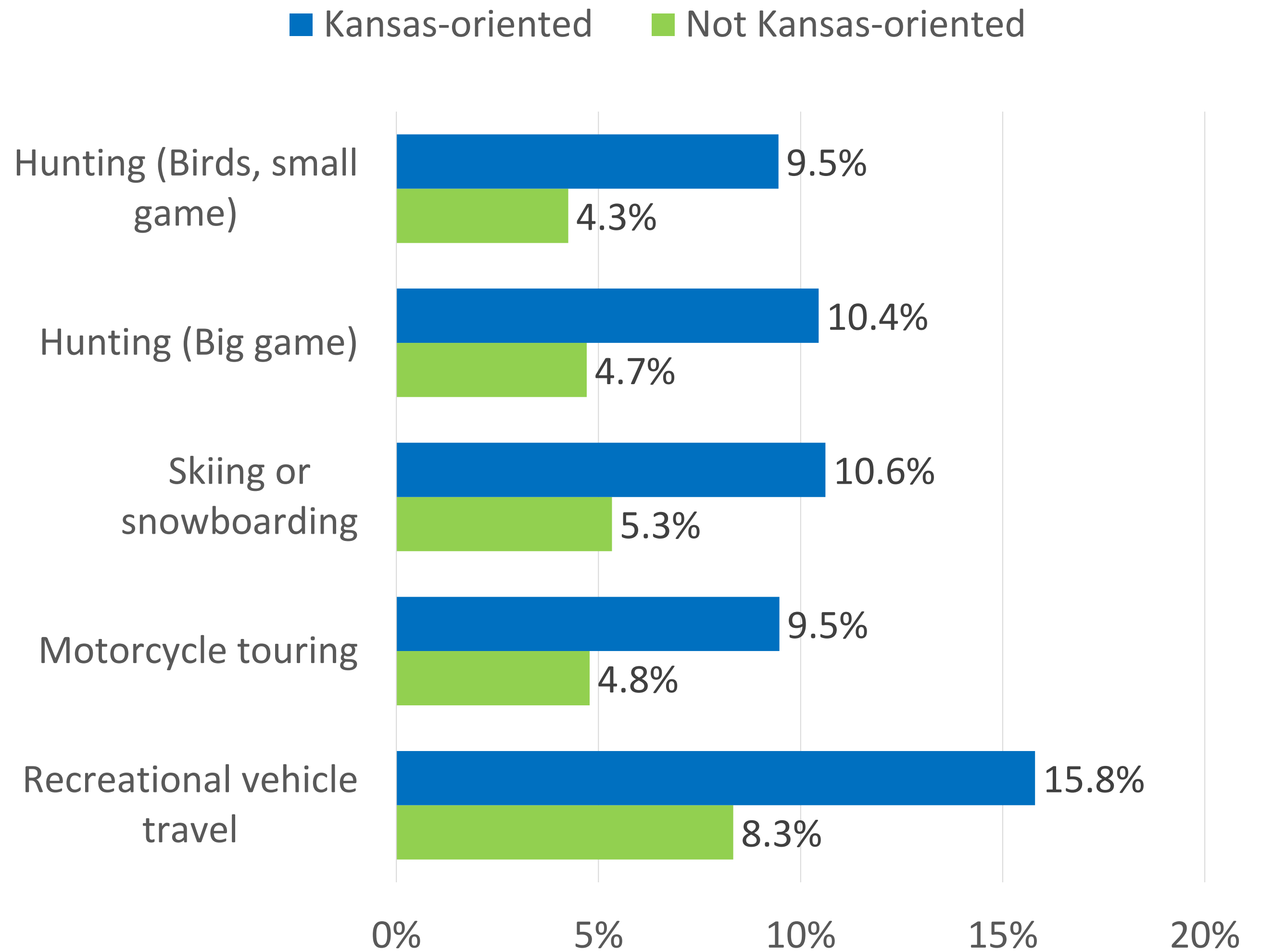
% Extremely high interest - I'm passionate about this



Kansas-oriented Travelers

*How they're
most different
from other
travelers*

Top 5, by % Difference



Questions?

