

Economic Impact of Tourism in Kansas - 2022

September 2023

Prepared for: Kansas Tourism





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INTRODUCTION

PROJECT BACKGROUND

The travel sector is an integral part of the Kansas economy. Visitors generate significant economic benefits to households, business, and government. This economic activity represents a critical driver of the state's economy. In 2022, growth in visitor activity provided an extra \$275 million in income to Kansas job holders and \$76 million more in state and local tax revenues.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development.

This is particularly important for Kansas as its visitor economy rebounds. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the significance of the visitor economy in Kansas, Tourism Economics developed a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the visitor economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for the state of Kansas. The model traces the flow of visitor-related expenditures through the state's economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.

Visitors included those who stayed overnight or traveled more than 50 miles to the destination.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in ES202 data.

The analysis draws on the following data sources:

- D.K. Shifflet: survey data, including spending and visitor totals for domestic visitors to Kansas
- STR lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels.
- Tax collections: Bed tax and sales tax receipts for select industries.
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry
- Tourism Economics: international travel data for overseas, Canadian, and Mexican travel to Kansas based on aviation, survey, and credit card information
- National/State park data

ECONOMIC IMPACTS KEY FINDINGS

VISITS AND VISITOR SPENDING

With visits growing to reach more than 90% of their pre-pandemic level and with growth in overnight visitation and prices in certain areas, visitor spending surpassed pre-pandemic levels in 2022. Overall, visitor spending reached \$7.7 billion, growing 10% and surpassing pre-pandemic levels by 5%. Visits grew to 36.4 million, an increase of 2.7 million visitors.



36.4 MILLION

Visitors to Kansas in 2022



2.7 MILLION

Increase in Visitors to Kansas in 2022



\$7.7 BILLION

Visitor Spending in Kansas in 2022



\$618 MILLION

Increase in Visitor Spending in Kansas in 2022

TOTAL ECONOMIC IMPACT

The direct visitor spending of \$7.7 billion generated a total economic impact of \$12.5 billion in Kansas in 2022 including indirect and induced impacts. This total economic impact sustained 88,509 jobs, earning those jobholders \$3.4 billion and generated \$777 million in state and local tax revenues in 2022.



\$12.5 BILLION

Total Economic Impact of Tourism in Kansas in 2022

SUMMARY ECONOMIC IMPACTS Kansas Tourism (2022)



\$7.7B

Visitor Spending



\$12.5B

Total Economic Impact



88,509

Total Jobs Supported



\$3.4B

Total Income



\$777M

State & Local Tax Revenue Generated



VISITS & VISITOR SPENDING

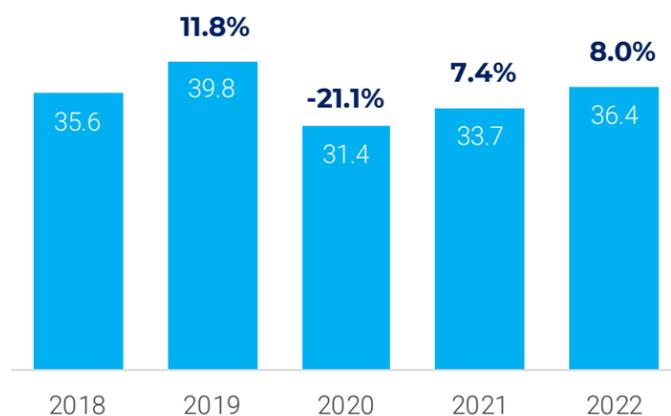
Visitor spending in Kansas reached \$7.7 billion in 2022. Kansas visits and visitor spending grew 8% and 10%, respectively, driven by continued strength in leisure travel and recovery in business travel in 2022. With visitation growth, growth in overnight travel, and price increases in several categories of spending, visitor spending surpassed pre-pandemic levels by 5%.

VISITOR VOLUME

Visitation grew by 8% to reach 36.4 million, supported by growth in leisure travel and recovery in business and international travel. The number of visits increased by 2.7 million in 2022, and cumulatively have reached 5 million since 2020.

Kansas visitor volume

Amounts in millions



Sources: D.K. Shifflet, Tourism Economics

VISITOR SPENDING

Visitor spending reaches \$7.7 billion in 2022.

Visitors to Kansas spent \$7.7 billion in the state in 2022, an increase of \$717 million as spending surpassed pre-pandemic levels by 5%.

The largest share of visitor spending was on transportation costs. Visitors' \$2.3 billion spent on gas, ride-shares, parking, tolls, and more in 2022 was 29.5% of total visitor spending.

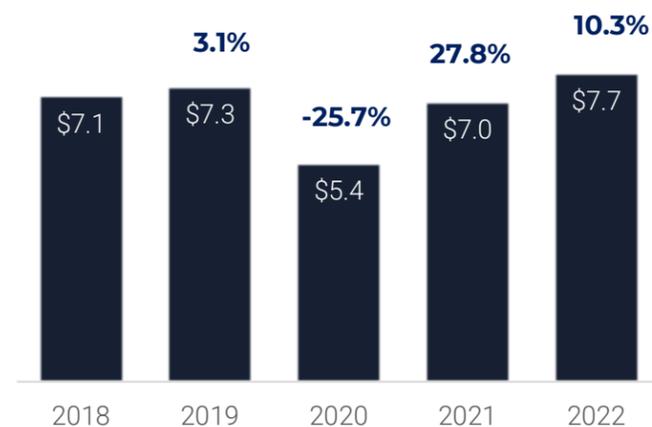
Food & beverage spending by visitors – at restaurants, bars, and grocery stores – was around 25% of the overall visitor budget.

Retail activity by visitors was 16.1% of overall visitor spending in 2022 followed by recreational spending with a 15.2% share of visitor spending.

Fourteen percent of the visitor budget was spent in Kansas went to lodging purposes.

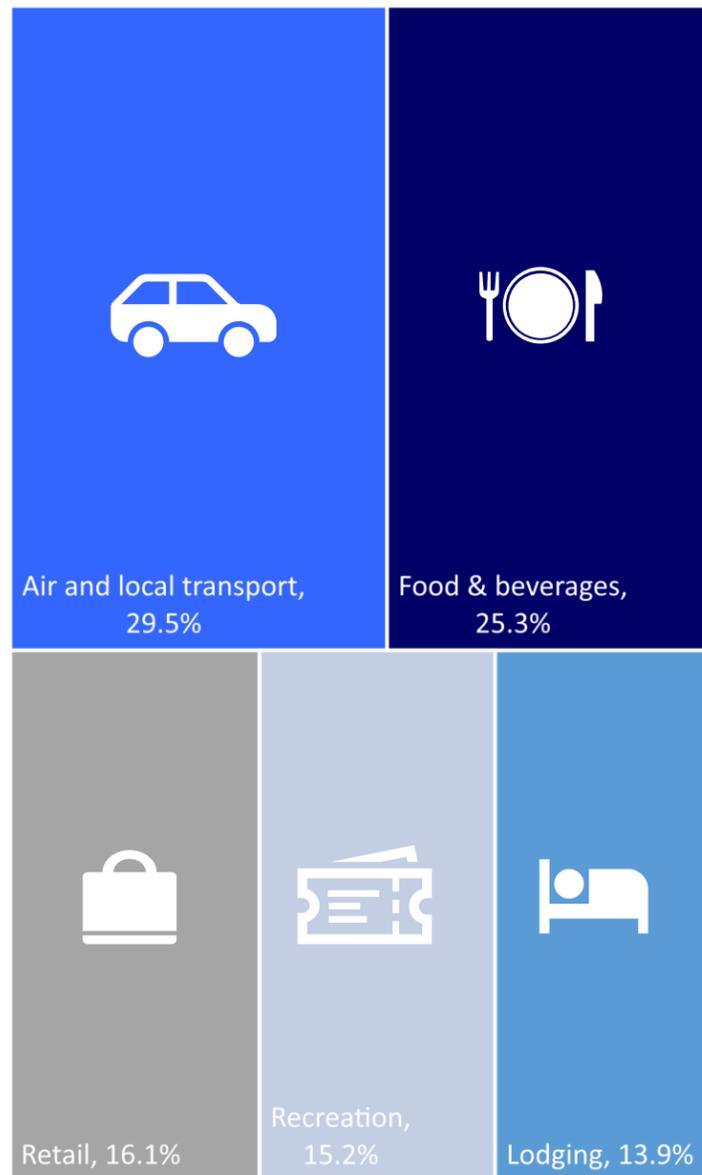
Kansas visitor spending

Amounts in \$ billions



Sources: D.K. Shifflet, Tourism Economics

 **\$7.7 BILLION**
Total Visitor Spending in 2022



Source: Tourism Economics

Note: Lodging spending includes dollars spent on short-term rentals and other second home income. Transport includes both air and local transportation.

VISITOR SPENDING TRENDS BY CATEGORY

Spending grew across all spending categories with the strongest growth seen in lodging, transportation and recreational spending categories.

Transportation spending by visitors in Kansas jumped \$280 million to \$2.3 billion. The continued recovery in air passenger counts, increased visitation, and growth in gas prices all contributed to this increase.

With key venues re-opening and attractions increasing capacity, recreational spending jumped 11% in 2022 to \$1.2 billion. Lodging spending increased 14% in 2022, growing nearly \$130 million.

Spending by visitors in 2022 at restaurants, grocery stores, and bars surpassed pre-pandemic levels by more than 7% in 2022, at \$1.9 billion.

Kansas's visitor spending has increased 5% compared to 2019. For the US, visitor spending in 2022 is up 1.2%. Kansas's pandemic losses were smaller than the US and the state has recovered faster than the country as a whole.

Kansas visitor spending in 2022 was 5% higher than 2019.

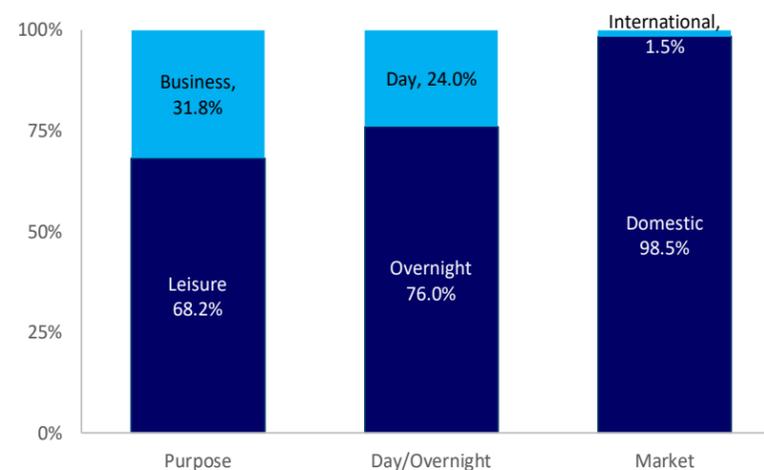
VISITOR SEGMENTS

Overnight visitor spending growth has supported overall visitor spending growth in 2021 and 2022. In 2022, spending by overnight visitors increased to \$5.8 billion, 76% of the overall spending. With 16 million person-trips in Kansas, spending by an overnight visitor was \$367 per-person.

Day spending grew to surpass \$1.8 billion in 2022.

Kansas spending share by segment

Percent % of visitor spending by market



Source: Tourism Economics

Kansas visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2022

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Total visitor spending	\$7,107	\$7,327	\$5,446	\$6,960	\$7,677	10.3%	104.8%
Lodging*	\$1,122	\$1,163	\$658	\$937	\$1,065	13.7%	91.6%
Food & beverage	\$1,723	\$1,804	\$1,415	\$1,809	\$1,941	7.3%	107.6%
Retail	\$1,076	\$1,086	\$880	\$1,114	\$1,167	4.8%	107.5%
Recreation	\$1,164	\$1,192	\$842	\$1,114	\$1,237	11.1%	103.8%
Transportation**	\$2,022	\$2,082	\$1,651	\$1,986	\$2,266	14.1%	108.9%

Source: Tourism Economics

* Lodging includes short-term rentals and other second home spending

** Transportation includes both ground and air transportation

Visitor volume and spending

Amounts in mils of persons, \$ millions, and \$ per person

	2018	2019	2020	2021	2022
Total visitors	35.6	36.5	31.4	33.7	36.4
Day	21.0	21.6	19.4	19.4	20.5
Overnight	14.5	14.9	12.0	14.3	15.9
Total visitor spending	\$7,107	\$7,327	\$5,446	\$6,960	\$7,677
Day	\$1,747	\$1,695	\$1,352	\$1,701	\$1,840
Overnight	\$5,360	\$5,632	\$4,093	\$5,259	\$5,836
Per visitor spending	\$200	\$200	\$173	\$207	\$211
Day	\$83	\$78	\$70	\$88	\$90
Overnight	\$368	\$378	\$340	\$368	\$367

Source: Tourism Economics

VISITOR SPENDING DISTRIBUTION - LEVELS

Visitor spending in 2022 increased in all the major spending categories. Increases in spending on lodging and food & beverages were around \$130 million – more than \$10 million more each month of the year. Recreational spending increased by \$123 million in 2022, growing to \$1.2 billion. This is also \$45 million more than the pre-pandemic high. Driven by increases in visitation, gas prices, and the recovery in air travel, transportation spending's increase provided 40% of the \$717 million growth in visitor spending in 2022.

Visitor spending in Kansas, 2018-2022

By category, \$ millions



Source: Tourism Economics

VISITOR SPENDING DISTRIBUTION - SHARES

Visitor spending shares were influenced by several factors in 2022. The continued recovery in spending, growth in types of visitation, and uneven price increases across the categories all impacted changes in spending shares.

The continued recovery in lodging spending helped increase the share of visitor spending at hotels, motels, campgrounds, and short-term rentals to 13.9%, up from 13.5% in 2021. Recovery in air travel and gas price increases pushed the transportation share to 29.5% in 2022, up one percentage point.

Visitor spending shares in Kansas, 2018-2022

By category, %



Source: Tourism Economics

VISITOR ECONOMY TRENDS

The visitor economy looks at a broader range of tourism-related expenditures. These include government support for tourism as well as capital investment (both new structures and machinery and equipment spending).

Overall, traveler demand reached \$8.4 billion in 2022 with domestic traveler spending dominating, bringing in \$7.6 billion towards overall traveler demand. Capital investment in support of tourism grew to \$560 million in 2022, an increase of 19%. Growth in governmental support of tourism was spurred by a strong increase in transient tax revenue.

Tourism Capital Investment

Amounts in \$ millions

	2018	2019	2020	2021	2022
Total Tourism CAPEX	\$530	\$613	\$416	\$471	\$560
Machinery & equip.	\$353	\$364	\$275	\$345	\$386
Construction	\$178	\$249	\$141	\$126	\$175

VISITOR ECONOMY DISTRIBUTION

In Kansas, domestic visitor markets increased their relative importance to 90.5% of tourism demand in 2022.

Capital investment in tourism-related construction and machinery & equipment represented 6.7% of all tourism-related demand.

International visitor markets provided 1.4% of demand in 2022.

Governmental support share was 0.6% of all Kansas tourism demand in 2022.

Kansas tourism demand

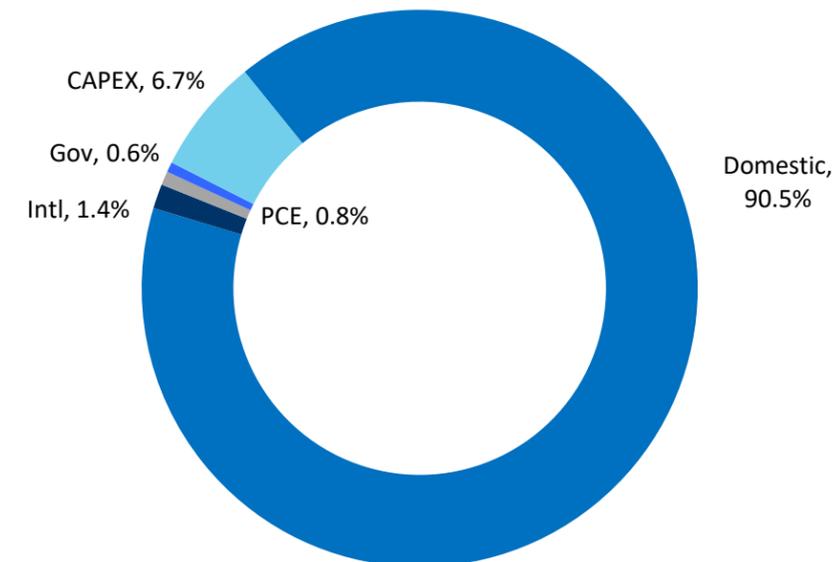
Amounts in \$ millions, 2022 % change, and % relative from 2019

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Tourism Demand	\$7,755	\$8,063	\$5,989	\$7,539	\$8,353	10.8%	103.6%
Domestic Visitor	\$7,003	\$7,220	\$5,410	\$6,901	\$7,558	9.5%	104.7%
International Visitor	\$104	\$107	\$36	\$60	\$119	98.4%	110.7%
Non-visitor PCE	\$63	\$67	\$69	\$71	\$67	-6.4%	99.3%
Governmental Support	\$55	\$56	\$58	\$37	\$49	31.5%	87.2%
Capital Investment	\$530	\$613	\$416	\$471	\$560	19.0%	91.4%

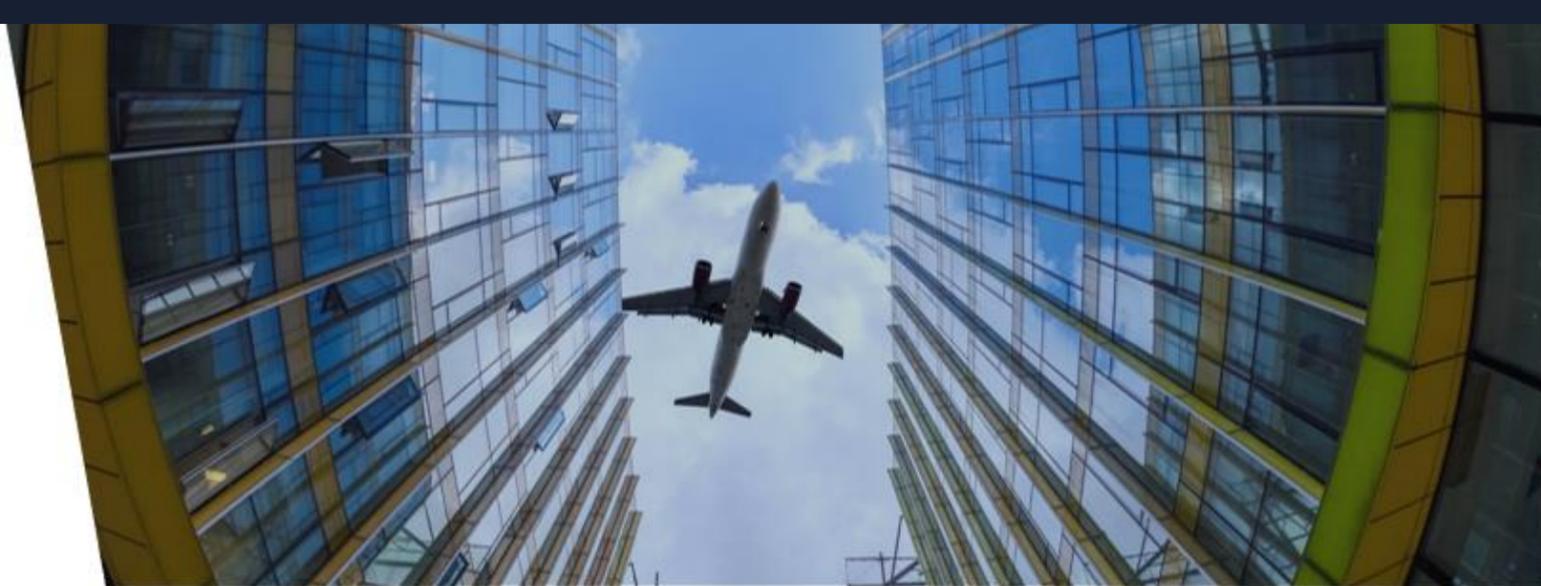
Source: Tourism Economics

Kansas tourism demand

Percent distribution



Source: Tourism Economics



ECONOMIC IMPACT METHODOLOGY

The analysis of the Kansas visitor economy begins with direct visitor spending and then analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the Kansas economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes 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 or supply-chain effects.
- 3. Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact - direct, indirect and induced - for a broad set of indicators, including:

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

ECONOMIC IMPACT FRAMEWORK

DIRECT IMPACTS
Kansas' visitor spending



RETAIL



ENTERTAINMENT/REC



FOOD & BEVERAGE



TRANSPORTATION



LODGING

INDIRECT IMPACTS

Purchases of inputs from suppliers



SUPPLY
CHAIN
EFFECTS



B2B GOODS &
SERVICES
PURCHASED

INDUCED IMPACTS

Consumption generated by
household income impacts:



INCOME
EFFECT



HOUSEHOLD
CONSUMPTION

TOTAL IMPACTS

Direct, indirect, and
induced impacts



SALES



GDP



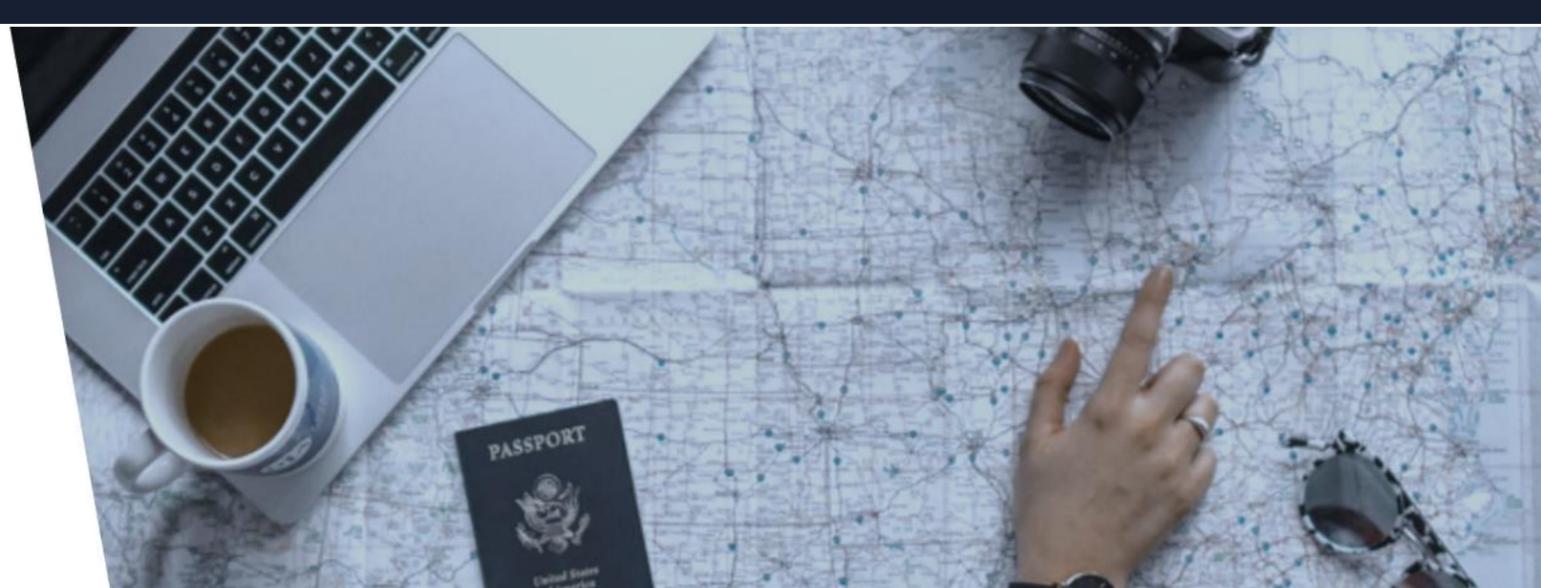
JOBS



INCOME



TAXES



ECONOMIC IMPACT FINDINGS

DIRECT IMPACTS

The number of jobs directly supported by visitor spending grew 6.3% in 2022, reaching 60,655 jobs in Kansas. Employment supported by visitor activity increased by 3,600 jobs. With the increase, the number of jobs directly supported by visitors rebounded to 92% of pre-pandemic levels. Nationwide, employment is only at 88% of pre-pandemic levels.

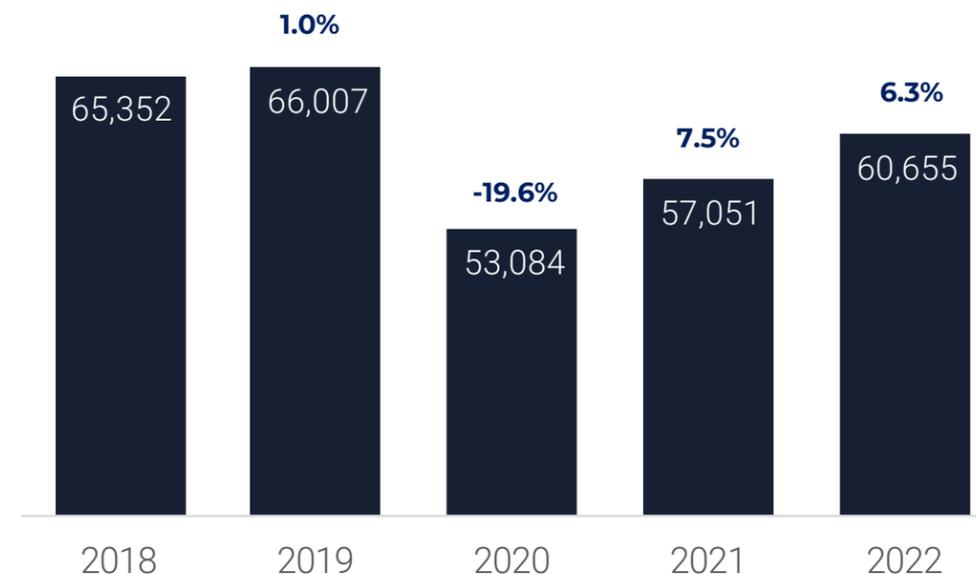
This 'Tourism Industry' includes jobs from many different industries – including accommodations and food services, recreation, retail, transportation and more. It is not all of the employment in any of those industries as local demand will account for portions, if not the majority, of employment in all of those industries.

If direct visitor-supported employment was treated as a single industry, it would rank 12th in comparison to all other sectors. In 2021, tourism ranked 13th – passing wholesale trade in 2022.

The Tourism Industry ranked 12th in jobs in Kansas

Visitor supported employment in Kansas

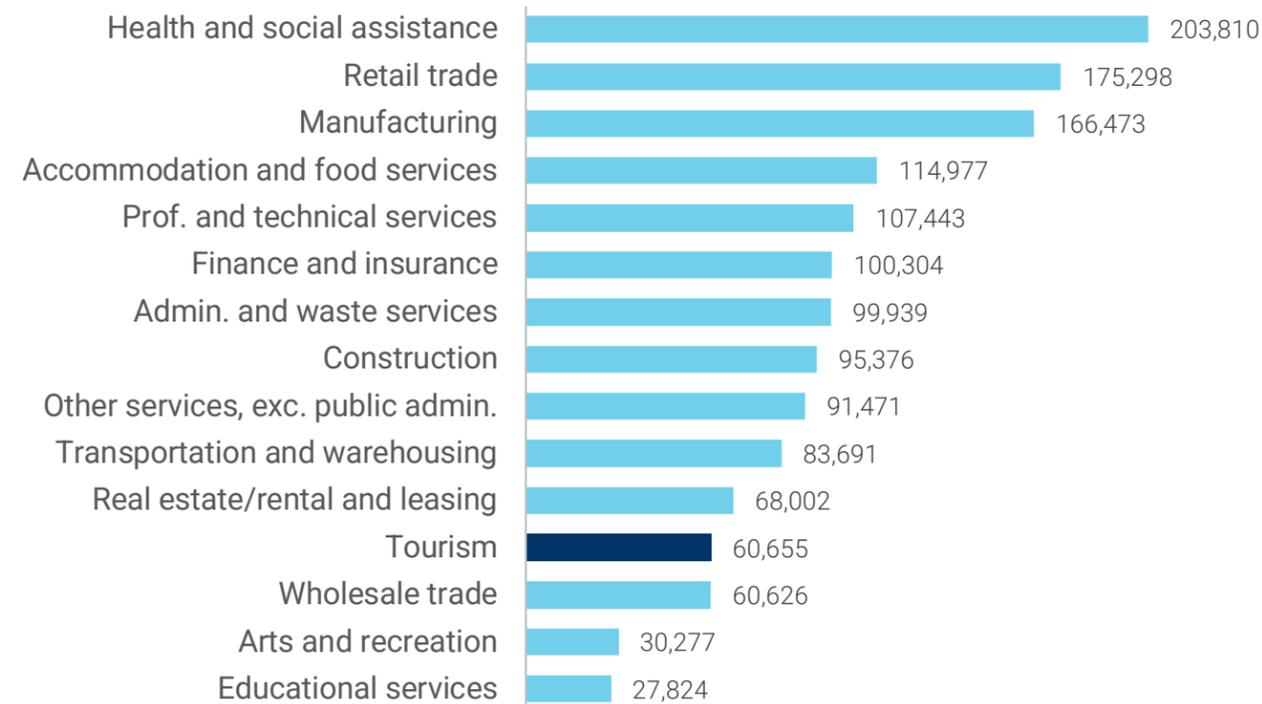
Amounts in number of jobs



Source: Tourism Economics

Employment in Kansas, by major industry

Amounts in number of jobs



Source: Tourism Economics



ECONOMIC IMPACT FINDINGS

BUSINESS SALES IMPACTS

Visitor activity supported a total of \$12.5 billion in business sales in 2022. Visitor economy spending, including visitor spending, construction in support of tourism and governmental spending on tourism, grew to \$8.4 billion. Indirect and induced impacts added another \$4.1 billion as tourism businesses and workers spent in the state's economy.

Note only do industries like restaurants see significant benefits from visitor activity – a total of \$2.0 billion – but visitor activity also supported a total of \$738 million in sales in the business services industry. This is spending by tourism businesses and workers on accountants, interior designers, advertising, veterinarians and more.

Summary economic impacts (2022)

Amounts in \$ billions



Source: Tourism Economics

Business sales impacts by industry (2022)

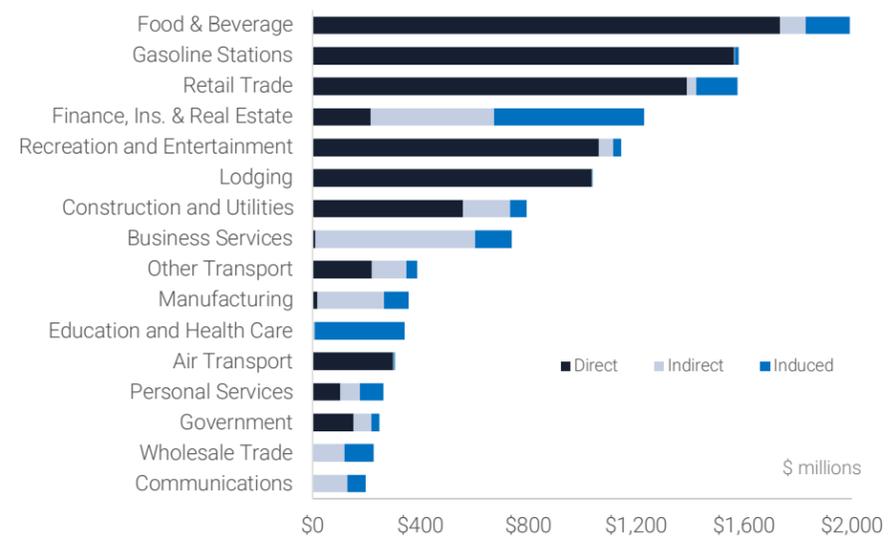
Amounts in \$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$8,353	\$2,228	\$1,896	\$12,477
Food & Beverage	\$ 1,733	\$96	\$163	\$1,991
Gasoline Stations	\$ 1,564	\$2	\$14	\$1,579
Retail Trade	\$ 1,388	\$35	\$154	\$1,576
Finance, Ins. & Real Estate	\$ 215	\$458	\$557	\$1,229
Recreation and Entertainment	\$ 1,061	\$54	\$29	\$1,144
Lodging	\$ 1,036	\$1	\$1	\$1,038
Construction and Utilities	\$ 557	\$175	\$61	\$793
Business Services	\$ 9	\$594	\$135	\$738
Other Transport	\$ 220	\$128	\$41	\$388
Manufacturing	\$ 19	\$246	\$91	\$356
Education and Health Care	-	\$7	\$333	\$340
Air Transport	\$ 298	\$3	\$4	\$304
Personal Services	\$ 103	\$71	\$88	\$263
Government	\$ 152	\$66	\$31	\$248
Wholesale Trade	-	\$117	\$110	\$226
Communications	-	\$128	\$68	\$196
Agriculture, Fishing, Mining	-	\$47	\$18	\$65

Source: Tourism Economics

Visitor economy business sales impacts by industry (2022)

Amounts in \$ millions



Source: Tourism Economics

VALUE ADDED IMPACTS

The value of all visitor-supported goods and services produced in Kansas in 2022 for Kansas visitors was \$5.7 billion, 2.7% of the Kansas economy.

Summary value-added impacts (2022)

Amounts in \$ billions



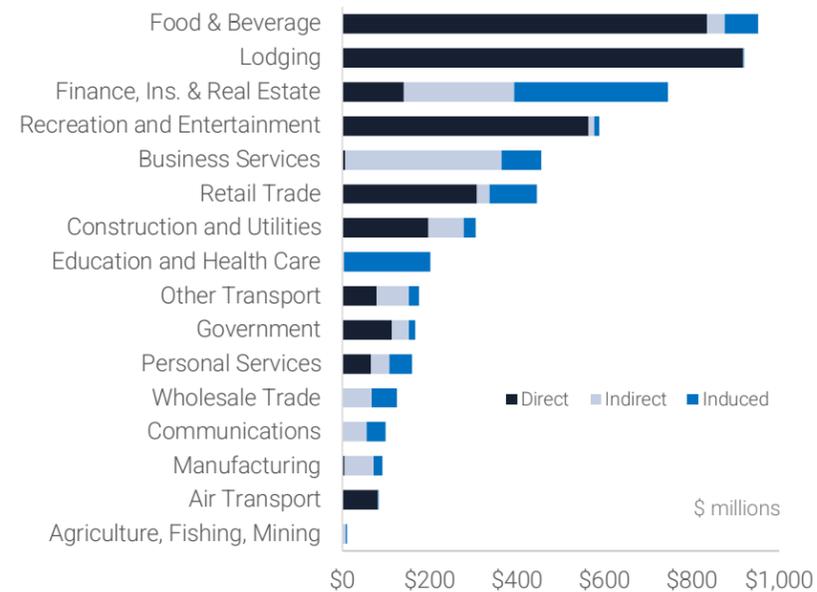
Source: Tourism Economics

The locally produced portion of visitor-supported sales in the finance & real estate industry added \$745 million to state GDP in 2022.

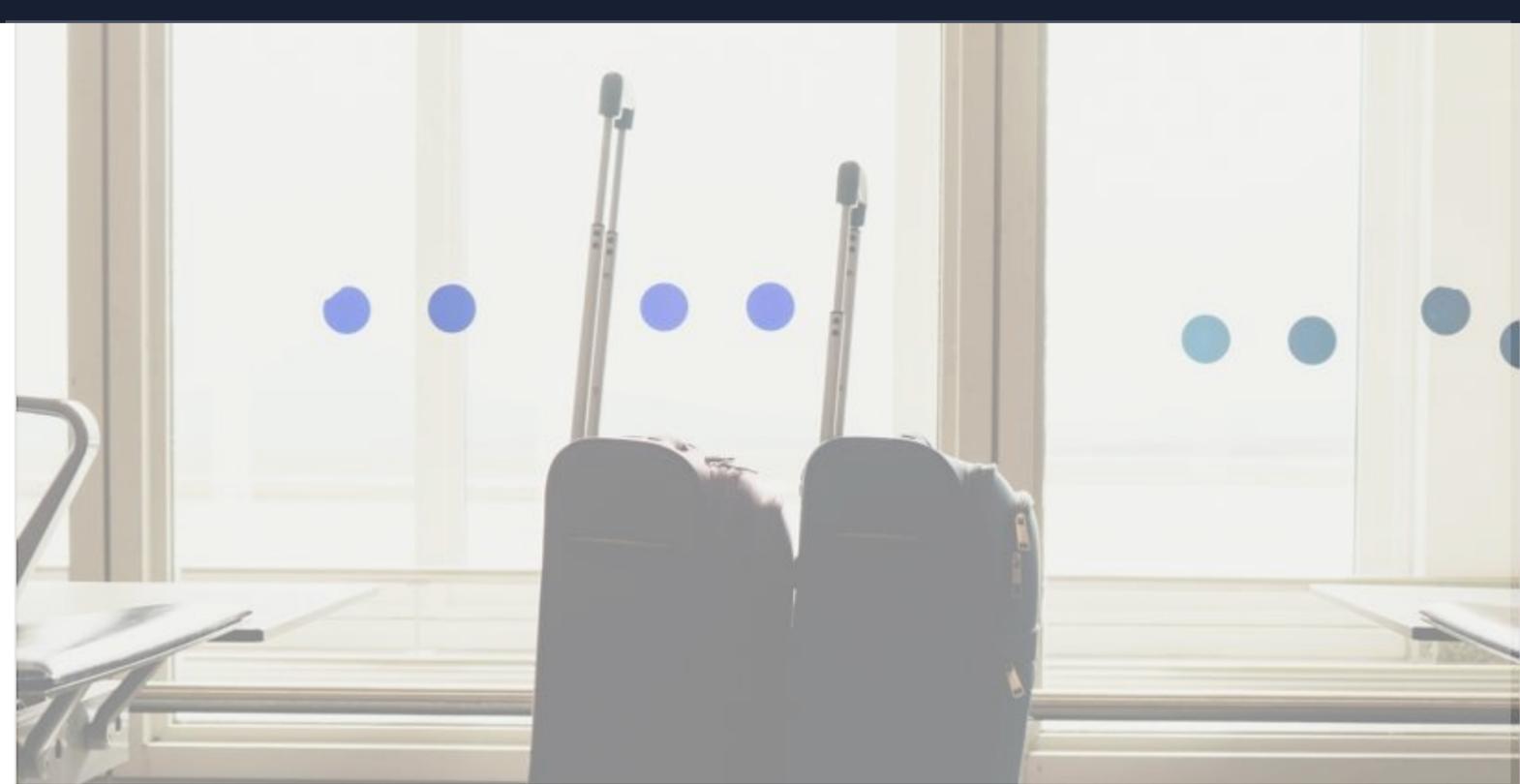
Spending by travel demand-supported workers supported \$197 million in GDP contribution in the education and health care industries, showing how tourism activity supports businesses across the industrial spectrum.

Visitor value-added impacts by Industry (2022)

Amounts in \$ millions



Source: Tourism Economics



Summary value-added impacts by industry (2022)

Amounts in \$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$ 3,494	\$ 1,127	\$ 1,089	\$ 5,711
Food & Beverage	\$ 835	\$ 40	\$ 77	\$ 952
Lodging	\$ 918	\$ 1	\$ 1	\$ 919
Finance, Ins. & Real Estate	\$ 141	\$ 252	\$ 352	\$ 745
Recreation and Entertainment	\$ 564	\$ 12	\$ 12	\$ 588
Business Services	\$ 7	\$ 358	\$ 91	\$ 456
Retail Trade	\$ 307	\$ 29	\$ 109	\$ 446
Construction and Utilities	\$ 196	\$ 81	\$ 29	\$ 306
Education and Health Care	-	\$ 4	\$ 197	\$ 201
Gasoline Stations	\$ 180	\$ 2	\$ 8	\$ 189
Other Transport	\$ 79	\$ 73	\$ 23	\$ 175
Government	\$ 113	\$ 39	\$ 15	\$ 167
Personal Services	\$ 66	\$ 41	\$ 53	\$ 160
Wholesale Trade	-	\$ 67	\$ 57	\$ 125
Communications	-	\$ 56	\$ 42	\$ 98
Manufacturing	\$ 5	\$ 65	\$ 21	\$ 92
Air Transport	\$ 81	\$ 1	\$ 1	\$ 83
Agriculture, Fishing, Mining	-	\$ 8	\$ 3	\$ 11

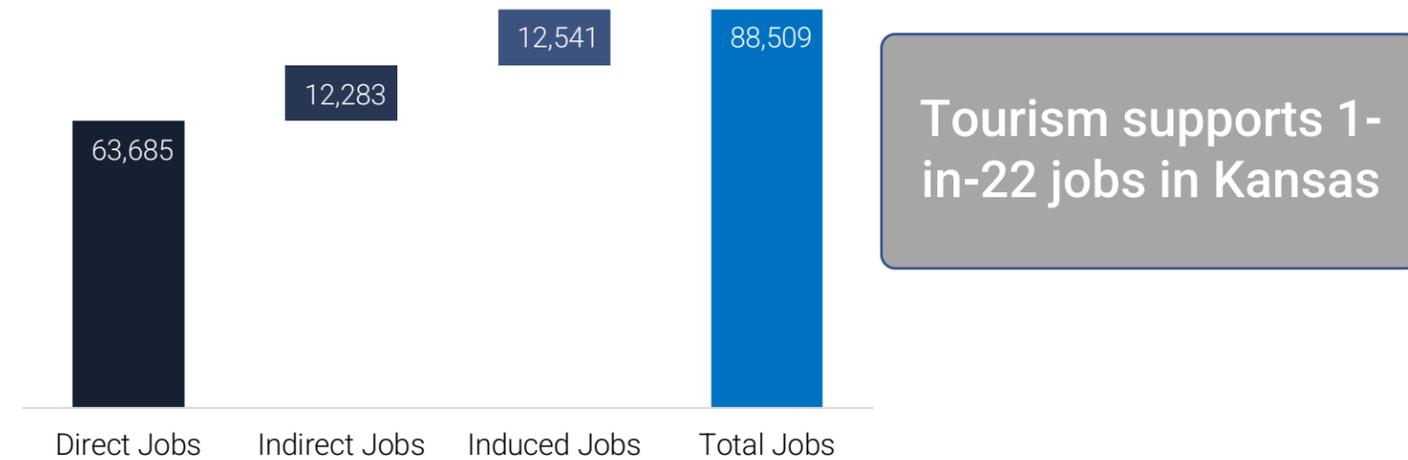
Source: Tourism Economics

EMPLOYMENT IMPACTS

Visitor activity supported a total of 88,509 jobs in 2022, including 63,685 direct jobs and 24,824 jobs supported through indirect and induced impacts. This equates to 1-in-22 jobs in Kansas.

Summary employment impacts (2022)

Amounts in number of jobs



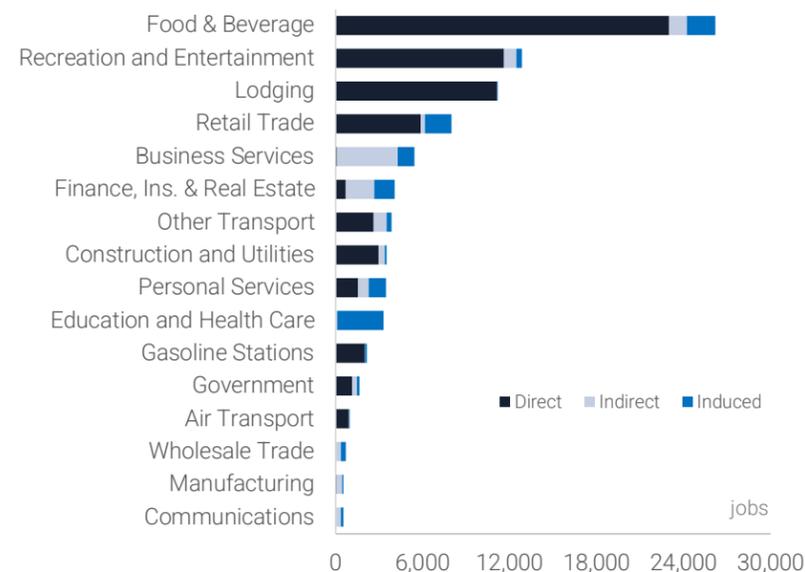
Source: Tourism Economics

With tourism a labor-intensive industry, more of the employment impact is directly from visitor activity, pushing those industry's rankings up. Ranking 1st, visitor spending supports the largest number of jobs in the food & beverage industry, 26,204.

Spending by tourism-supported workers supports 1,206 jobs in personal services businesses – from automotive repair to beauty salons and civic organizations.

Visitor job Impacts by industry (2022)

Amounts in number of jobs



Source: Tourism Economics



Summary employment Impacts by industry (2022)

Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	63,685	12,283	12,541	88,509
Food & Beverage	22,981	1,226	1,997	26,204
Recreation and Entertainment	11,630	838	376	12,845
Lodging	11,155	8	11	11,174
Retail Trade	5,860	289	1,839	7,988
Business Services	92	4,214	1,113	5,419
Finance, Ins. & Real Estate	698	1,981	1,395	4,075
Other Transport	2,612	921	344	3,877
Construction and Utilities	2,974	424	121	3,519
Personal Services	1,545	728	1,206	3,479
Education and Health Care	-	93	3,196	3,289
Gasoline Stations	2,015	19	127	2,161
Government	1,135	335	166	1,636
Air Transport	931	6	8	944
Wholesale Trade	-	362	333	695
Manufacturing	56	388	112	556
Communications	-	359	160	520
Agriculture, Fishing, Mining	-	91	37	128

Source: Tourism Economics

LABOR INCOME IMPACTS

Visitor activity generated a total of \$3.4 billion in labor income to Kansas job holders. Visitor activity directly supported more than \$2.1 billion in income with indirect and induced jobs supported by tourism added another \$1.3 billion.

Summary labor income impacts (2022)

Amounts in \$ billions

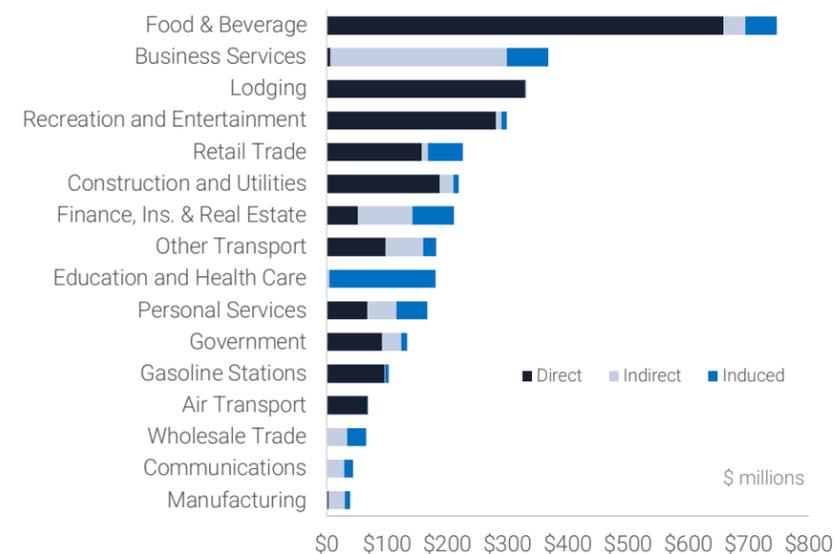


Source: Tourism Economics

There are nine industries in which visitor activity supports more than \$180 million in personal income. These range from the obvious—food & beverage and lodging, to the less obvious—business services and education & health care.

Visitor labor income Impacts by industry (2022)

Amounts in \$ millions



Source: Tourism Economics



Summary labor income impacts (2022)

Amounts in \$ millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$2,095	\$705	\$589	\$3,388
Food & Beverage	\$ 658	\$36	\$52	\$747
Business Services	\$ 6	\$293	\$69	\$368
Lodging	\$ 329	\$0	\$0	\$330
Recreation and Entertainment	\$ 281	\$9	\$9	\$299
Retail Trade	\$ 158	\$10	\$58	\$226
Construction and Utilities	\$ 188	\$22	\$9	\$218
Finance, Ins. & Real Estate	\$ 51	\$91	\$69	\$211
Other Transport	\$ 97	\$62	\$22	\$182
Education and Health Care	-	\$4	\$177	\$180
Personal Services	\$ 67	\$49	\$51	\$167
Government	\$ 92	\$31	\$10	\$133
Gasoline Stations	\$ 96	\$1	\$5	\$102
Air Transport	\$ 67	\$0	\$0	\$68
Wholesale Trade	-	\$34	\$32	\$65
Communications	-	\$29	\$14	\$43
Manufacturing	\$ 3	\$27	\$8	\$38
Agriculture, Fishing, Mining	-	\$7	\$4	\$11

Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

FISCAL (TAX) IMPACTS

Visitor spending, supporting jobs, income, and business sales, generated \$1.4 billion in government revenues.

State and local taxes alone tallied \$777 million in 2022.

Each household in Kansas would need to be taxed an additional \$660 to replace the visitor-generated taxes generated by visitor activity in Kansas and received by state and local governments in 2022.

State & local tax revenues equal \$660 per Kansas household

Fiscal (tax) impacts

Amounts in \$ millions

	2018	2019	2020	2021	2022	2022 Growth
Total Tax Revenues	\$1,178.6	\$1,225.9	\$1,084.0	\$1,252.4	\$1,386.0	10.7%
Federal Taxes	\$540.3	\$554.6	\$494.8	\$552.0	\$609.2	10.4%
Personal Income	\$172.8	\$177.2	\$153.2	\$170.7	\$199.6	16.9%
Corporate	\$41.1	\$42.8	\$31.7	\$37.0	\$48.0	29.8%
Indirect Business	\$43.1	\$44.0	\$34.4	\$38.8	\$40.4	4.2%
Social Insurance	\$283.3	\$290.6	\$275.6	\$305.5	\$321.2	5.1%
State and Local Taxes	\$638.3	\$671.3	\$589.1	\$700.5	\$776.8	10.9%
Sales	\$269.4	\$281.2	\$261.4	\$333.9	\$359.3	7.6%
Bed Tax	\$46.6	\$48.3	\$26.8	\$38.4	\$55.7	45.2%
Personal Income	\$57.8	\$61.2	\$49.5	\$54.6	\$62.9	15.3%
Corporate	\$7.1	\$7.8	\$8.8	\$10.1	\$14.0	39.0%
Social Insurance	\$2.8	\$2.6	\$2.7	\$3.0	\$3.1	3.4%
Excise and Fees	\$43.5	\$46.1	\$25.7	\$28.5	\$32.1	12.6%
Property	\$210.9	\$224.1	\$214.3	\$231.9	\$249.6	7.6%

Source: Tourism Economics

Tourism-supported revenues to state government were \$372 million in 2022. The majority of state revenues are from sales taxes with income, excise & fees, and corporate taxes from visitor activity together adding \$94 million to state coffers.

Local tax revenues from visitor activity provided \$405 million to local governmental authorities with property taxes, bed taxes, fees, and sales taxes supporting local governmental revenues.

Fiscal (tax) impacts

Amounts in \$ millions

	State	Local
Total Revenues	\$372.0	\$404.9
Sales	\$274.7	\$84.6
Bed Tax	\$0.0	\$55.7
Personal Income	\$62.9	\$0.0
Corporate	\$14.0	\$0.0
Social Insurance	\$3.1	\$0.0
Excise and Fees	\$17.1	\$15.0
Property	\$0.0	\$249.6

Source: Tourism Economics

ECONOMIC IMPACTS IN CONTEXT



\$7.7B VISITOR SPENDING

Kansas's \$7.7 billion in visitor spending means that visitors spend on average \$21.0 million per day in the state.



\$717M VISITOR SPENDING INCREASE

Visitor spending growth in Kansas of \$717 million is larger than the construction cost of the 69Express project in Overland Park (\$570 million).



88,509 TOTAL JOBS

The total job impact of visitor activity in Kansas is nearly as large as the population of Lawrence, Kansas' 6th largest city.



\$777M TAX REVENUES

The \$777 million in tax revenues supported by visitor activity would pay for the salaries of 12,110 Kansas teachers – more than 30% of the nearly 40,000 teachers in the state.

Glossary – Spending Definitions

Term	Description
Lodging	Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitor spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending.
Service stations	Visitor spending on gasoline.
Second homes	Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau.

Glossary – Economic Impact Definitions

Term	Description
Direct Impact	Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.
Employment	Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year.
Labor income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	The economic enhancement a company gives its products or services before offering them to customers.
Local Taxes	City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.
State Taxes	State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

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, state, and city 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, London, Frankfurt, Ontario, and Sydney.

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 400 full-time staff, including 300 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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