


**Vision 2020**


Travel & Tourism Division  
Ks. Dept. Wildlife, Parks &  
Tourism

February 8, 2012



**Guiding Principles:**


- Do what the industry cannot do for itself
- Focus on targeted out-of-state and international audiences
- Support the industry
- Align resources with high impact programs and initiatives and evaluate
- Encourage and support ongoing dialogue, interaction & participation among tourism industry stakeholders



**Goals:**

#1 – Serve as lead state agency in promoting consumer travel to and within Kansas


#2 Strategically develop and enhance Kansas' tourism product to establish state as destination



**Goals:**


#3 - Provide communication & outreach to tourism industry.

#4 – Conduct research to guide Division programs, public & private sector investment and local tourism industry direction to opportunity providing highest ROI




**Goals:**

#5 – Develop and align resources efficiently to support business plan



**Marketing**

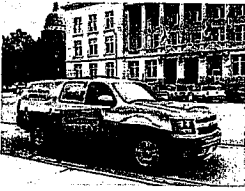
- Goal:
  - Get more people
  - To spend more time
  - And more money!










### 2011 Faces & Places Tour




- 42% Kansas visitors VFR
- 15,000 miles – 56 locations
- 121,000 Social media interactions
- FlatBurb



### 2011 Blue Cross Blue Shield of Kansas Healthy Kansas Initiative






- Summer & Fall campaign
- TV, Print, Radio, Outdoor
- Significant investment by BCBSKS



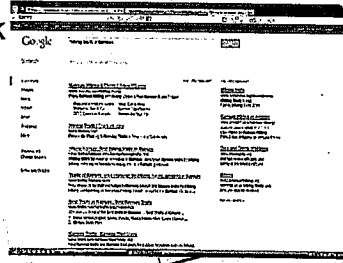
### Partnerships with Communities

- Co-op program
- Better buying power/ negotiated rates
- Collaborative presentation
- Variety of packages
- Allows the industry to do things they can't do on their own.

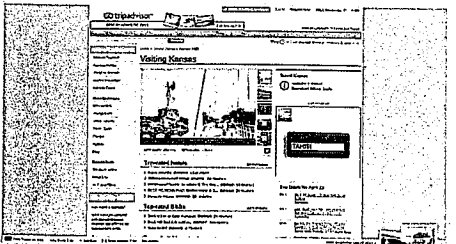
### Digital

- Pay-per-click
  - 70% increase
  - 202,000 clicks
- SEO



### Digital


- TripAdvisor – KS pg.




### Digital

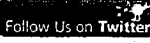
Experience nature and the arts  
Plan Your Next Getaway!


Targeted Display Online Advertising




## Social Media

 Find us on Facebook


 Follow Us on Twitter



14,003 Fans total

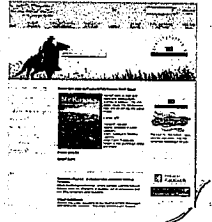

4,300 Followers total

79 Video uploads  
64,000 views




## TravelKS.com

- 1,242,076 Sessions
- 2011 YTD
- Over 7,000 pages
- New site coming spring
- Industry populated
- Approve all listings before going live.





## Targeted E-Blasts

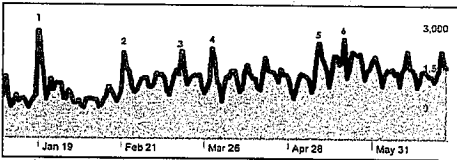
**Cruise the Flint Hills National Scenic Byway**  
Thoroughfare offers dramatic views, fascinating history.




**Monthly**  
**1.1 million FY'11**  
**15% Open Rate**



## Power of Targeted E-Blasts



1) KS150 2) Western Vibes Byway 3) Farmer's Market 4) Flint Hills 5) Ranches 4) "Fishing for Millions"



## Events E-Blasts


**KANSAS EVENTS**

Check out these upcoming events in Kansas:

**Cherokee Strip Land Rush Museum Museum**  
Main Land Rush History Interpretation  
and 15, Kansas City

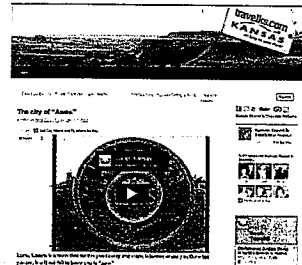

**Women in the Theater Festival**  
The 10th Annual Women in the Theater Festival will be held at the historic  
and restored 1900s-era building, the historic  
theater, owned and operated by the  
theater company, and the historic  
theater building. The festival will  
feature a variety of theatrical  
performances, including plays, musicals,  
and more. For more information,  
visit [www.womenintheater.com](http://www.womenintheater.com)

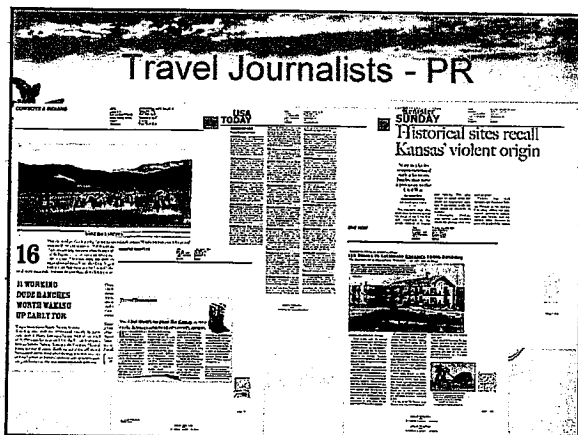
- 10,000 Monthly
- 18 Partners YTD
- 10% Open Rate



## Blogs


- Launched 2/2/11
- Monthly themes
- 2 posts per week
- Avg. 1,300 visitors per week






### Articles Appearing in 2011 (Highlights)

- San Diego Union Tribune
- Kansas City Star
- Knoxville News Sentinel
- Boston Sunday Globe
- Group Tour Magazine
- Convene
- Orange County Register
- The Tampa Tribune
- US Fish & Wildlife Service Refuge Update
- USA Today
- Cowboys & Indians magazine
- Midwest Traveler
- Las Vegas Review Journal
- Omaha Sunday World Herald
- Midwest Living
- Leisure Group Travel
- Courier magazine
- Highways magazine
- Memphis Commercial Appeal
- True West Magazine




### PR Events

- Media Events – 2011
  - Chicago
  - Denver
- Media Blitzes - 2012
  - Texas
  - Oklahoma
- Association Bids
- Direct Mail Program
- Hosted FAM Trips
- Great KS Story Quest
- Theme Feature Wire Release







### KS/OK International Cooperative


- **Program targets:** Wholesale tour operators, retail travel agencies, travel media, and traveling consumers who originate from Germany, Austria, Switzerland, United Kingdom, and Ireland.
- **Program funding:** 60% of program funds are from Oklahoma, allowing Kansas to enjoy 148% leveraged funding for European marketing from out-of-state sources.



### KS/OK International Cooperative

- Lure Brochure
  - German & English Language
- Retail Travel Agent Training
  - Germany, Switzerland, England, Scotland
- Consumer Marketing
  - Equestrian Shows
  - TV Documentaries
  - Radio
- Hosted Media





### Wholesale Tour Operator KS/OK Placement Examples

2001 = 1 tour operator/  
1 fly-drive (Germany)

2007 = 11 tour operators/  
17 fly-drives (7 Germany, 1 Austria, 3 England)

2011 = 20 tour operators/  
44 fly-drives (10 Germany, 1 Austria, 1 Switzerland, 1 Netherlands, 5 England, 1 Scotland, 1 Ireland)

## Group Tour

- Tracked more than \$2.2 million - 2011
- Responded to 151 tour planner inquiries
- Marketplaces – 99 appointments
  - National Tour Association (NTA)
  - American Bus Association (ABA)
  - Missouri Bank Travel Show
  - Tour Kansas Omaha Show
  - Travel Alliance Partners




## Group Tour

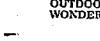
**Partnerships:**

- Grand Central USA
  - Arkansas, Kansas, Missouri, Oklahoma
  - [www.grandcentralusa.com](http://www.grandcentralusa.com)
- Travel Alliance Partners (TAP)
  - Guild Member – tracking
- TourKANSAS
  - Over 80 industry members





## KANSAS!

- Advertising/Partnerships
- Themed editions
- Expanded marketing efforts
  - Digital
  - Contests & Social (Foodie Friday)
  - "My Kansas"
    - 5<sup>th</sup>-12<sup>th</sup> graders – over 100 packets
    - Dept. of Education assisting
  - Newsstands – 8,500 copies
    - HyVee, Dillon's, Wal-Mart, Kwik Shops, Target, Independent Retailers

## Visitors Guide


- January, 2013
  - 300,000 Annual Publication
  - Advertiser supported
  - Expanded distribution
  - Digital value-added

## Byway Targeted Markets

Marketing will focus on four niche audiences:

- Bird watching enthusiasts
- Cyclists
- Cultural Heritage Travelers
- RVers/Campers





## Kansas Byways

FY12 Advertising

- Day Away Travel Guide
- Facebook Targeted Ads



Website

- Updated Version
- On-line byway booklet
- GPS Tours
- Social Media

## Kansas Byways

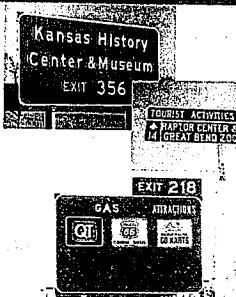
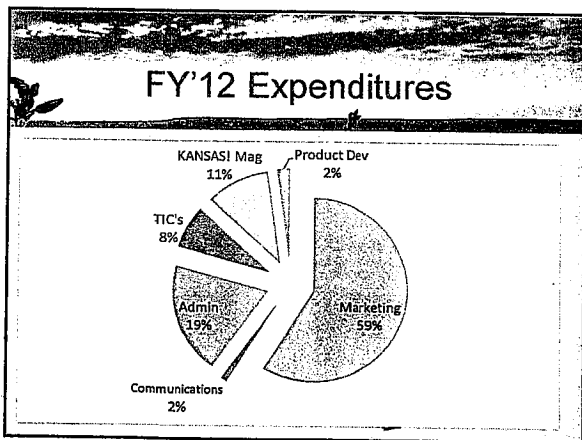
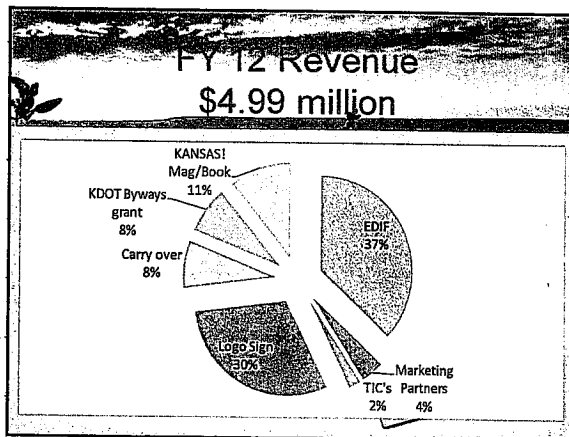
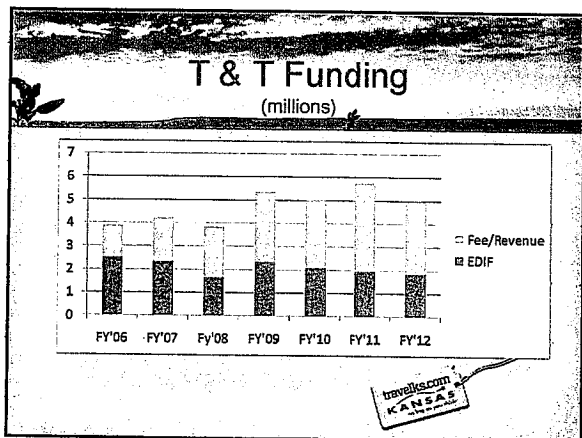
- Digital Media Grant
  - Gizmo Productions
    - B-Roll, Photography, Videos
    - March 2011-2013

## Signage Program

Tourism Signage Application Partnership with KDOT

- Supplemental Guide Signs
- Tourist Oriented Directional Signs (TODS)
- Logo Signs





## ROI


Advertising Effectiveness Study, 2009

- Increased household awareness
- Increased incremental travel in existing markets
- Incremental travel from new markets

**\$90 for every dollar spent on marketing**









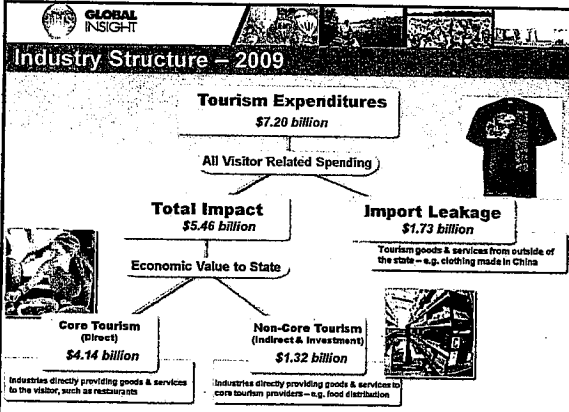
## 2009 Tourism Satellite Account

August 2010

## 2009 Travel Year TSA Estimates

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### Industry Structure - 2009

**Tourism Expenditures**  
\$7.20 billion

All Visitor Related Spending

**Total Impact**  
\$5.46 billion

Economic Value to State

**Core Tourism (Direct)**  
\$4.14 billion

Industries directly providing goods & services to the visitor, such as restaurants


**Non-Core Tourism (Indirect & Investment)**  
\$1.32 billion

Industries indirectly providing goods & services to core tourism providers - e.g. food distribution

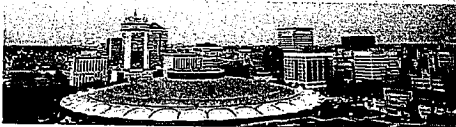
**Import Leakage**  
\$1.73 billion

Tourism goods & services from outside of the state - e.g. clothing made in China

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### Kansas Tourism: A Top Line View

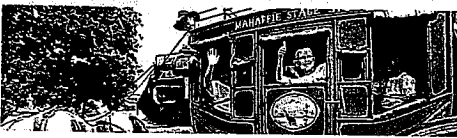


- ✓ Tourism expenditures were \$7.2B in 2009
- ✓ In '09, visitation fell by 8.6% and visitor spending fell by 3.1%
- ✓ Avg. spend-per-visitor was \$238 in '09
- ✓ 1 of every 9 Kansas Citizens owes his/her job to tourism
- ✓ Avg. Annual Tourism Wages were \$22,676 in '09
- ✓ Every 203 visitor/travelers creates a new job in KS

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### Kansas Tourism: The Impact on KS & the US



- ✓ Tourism is responsible for 4.5% of total KS Gross State Product
- ✓ Tourism is the 3<sup>rd</sup> largest industry in KS (based upon jobs)
- ✓ Tourism generated 27.4% of all state & local tax revenue in '09
- ✓ Tourism's tax contribution reached \$876 per KS Household
- ✓ In '09, KS's share of US total tourism jobs grew by 2.8% from '08
- ✓ In '09, KS's share of US direct tourism output grew by 5.7% from '08
- ✓ In '09, KS's share of US total tourism output grew by 3.4% from '08

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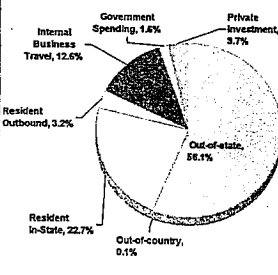
### Breaking Down Tourism Expenditures - 2009

Visitors from other states represent the largest portion of tourism expenditures in KS

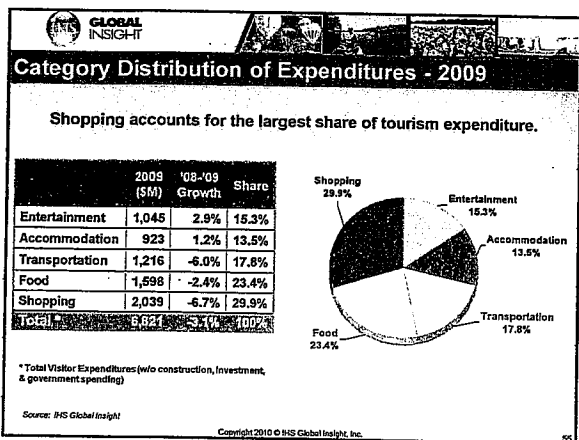
By Origin	Millions \$	Share
In State	3,150	44%
Other U.S.	4,041	56%
International	7	0%
<b>Total</b>	<b>7,198</b>	<b>100%</b>

By Source	Millions \$	Share
Visitor Spending	6,586	92%
Resident Outbound	232	3%
Government Spending	116	2%
Construction & Investment	264	4%
<b>Total</b>	<b>7,198</b>	<b>100%</b>

Source: IHS Global Insight Copyright 2010 © IHS Global Insight, Inc. 54



### Regional Summary: Total Tourism Expenditure

#### Region Expenditure

Region	Tourism Expenditure \$/Visa	Tourism Share of Total Region Expenditure	Region Share of Total State Tourism	Tourism Expenditure Growth 2008 - 2009
North Central Kansas	761.2	3.8%	11.0%	-3.4%
North East Kansas	2,979.7	3.3%	43.7%	-2.4%
North West Kansas	401.8	5.8%	5.9%	-3.1%
South Central Kansas	1,664.2	3.9%	27.3%	-4.0%
South East Kansas	383.3	2.4%	5.5%	-3.8%
South West Kansas	430.8	2.6%	6.3%	-3.2%
<b>Kansas Total</b>	<b>6,820.7</b>	<b>2.7%</b>	<b>100.0%</b>	<b>-3.1%</b>

\* Visitor spending only, which excludes investment

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- ### What Do Visitors\* Mean to Kansas?
- ✓ Each KS visitor generates about \$238 in expenditures, \$57 of which goes to businesses that do not directly "touch" that visitor
  - ✓ Every 203 visitors create a new job in Kansas
  - ✓ Each visitor contributes about \$58 in tax receipts, \$33 of which goes to state & local authorities
  - ✓ It takes only 39 visitors to pay for one KS public school student for one year\*\*
  - ✓ Each visitor generates \$112 in wages paid to workers directly employed in tourism
  - ✓ Each visitor adds about \$181 to Gross State Product
- \* Person stays  
\*\* Per student expenditure taken from the Federal Education Budget Project
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### Vision for Tourism by 2013

Kansas will be a top visitor destination in the Midwest, generating over \$6 billion in economic impact and directly supporting over 130,000 jobs.

- ### The Future?
- Competitive Landscape
    - Average State Tourism Marketing Budget - \$7.5 million (2010-11)
    - Missouri - \$15 million
    - Colorado - \$12 million
    - Oklahoma - \$6.3 million
    - Arkansas - \$11.6 million
    - S. Dakota - \$8 million
    - Kansas - \$2 million
    - Iowa - \$1.5 million
    - Nebraska - \$1.2 million
-