



FEBRUARY 2021

KANSAS TOURISM

Brand Perception Study

Better insights. **SMARTER STRATEGY.**

MMGY Travel Intelligence specializes in syndicated and custom market research exclusively for the travel and tourism industry. We boast the industry's most expansive and richest historical data, and we are dedicated to providing the highest-quality travel and traveler research.

Our mission is to provide clients with valuable insights they can apply to improve their results. Our portfolio of products and services is designed to power travel industry decision-makers through consumer insights, travel performance data, and audience modeling and segmentation.



Travel
Intelligence

OVERVIEW

MMGY Global Travel Intelligence fielded a destination brand awareness and sentiment study of Kansas as a visitor destination for both in-state and out-of-state visitor prospects. This study measured overall interest in visiting Kansas, and compared perceptions of Kansas relative to other competitor tourism destinations. The results of this study are intended to provide benchmark metrics for interest in visiting and overall consumer perceptions against which future studies will assess the efforts to elevate these measures over time.



Survey Methodology

- An online survey of 150 Kansas residents and 500 non-residents was conducted from January 22 – 28, 2021. Respondents were screened as follows:
 1. 21 years of age or older;
 2. Annual household income of at least \$50,000;
 3. Active overnight leisure travelers (taken at least one overnight leisure trip during the past 18 months);
- Non-residents live in the following origin market states:
 1. Colorado (n=144, 28% of total)
 2. Missouri (n=123, 25% of total)
 3. Nebraska (n=63, 13% of total)
 4. Oklahoma (n=80, 16% of total)
 5. Iowa (n=90, 18% of total)
- The error interval of the statistical estimates appearing in this report is +/- 4.4% at the 95% level of confidence for n=500 and +/- 8.0% for n=150.



/ Summary

1. Both non-residents and residents intend to travel during the next 12 months, expecting to take 3.3 and 3.1 overnight trips, respectively. On average, they intend to spend about \$875 on each of their trips. Due to COVID-19, it is expected that travelers will continue to seek out vacation destinations closer to home that do not require a flight.
2. Safety, Friendliness and Accessibility are Kansas' top-rated attributes.
 - Both groups (residents and non-residents) identified the same top three rated attributes for Kansas: safety, friendly residents and accessibility. Not surprisingly, residents rated Kansas higher than non-residents on all attributes.
 - On an open-end basis, the words mentioned most often to describe Kansas were wheat, flat, boring, plains and sunflowers.
 - One of the primary reasons for a lack of interest in visiting Kansas is the perception that there is not enough to do.

Despite the current climate, many people still want to travel and are looking for easily accessible destinations (one of Kansas' top attributes). Kansas should position itself as such to Kansas residents and those in the surrounding areas. And, given that potential prospects feel that there is not enough to do, there is an opportunity for broadening the understanding of what Kansas has to offer visitors.



/ Summary

4. One-third of residents (32%) and 1 in 5 non-residents (20%) recall seeing or hearing advertising for Kansas in the past two years. Among those who do recall advertising, more than half (58% of residents and 64% of non-residents) indicate it caused them to be more interested in taking a vacation to Kansas.
5. Non-residents rate Colorado and Missouri the highest of the six states in terms of past visitation, interest in visiting, likelihood to visit and on most attributes included in the survey, while the remaining states (Kansas, Iowa, Nebraska and Oklahoma) rate fairly similarly on these metrics.
 - Along with Iowa, Kansas is the third most visited state (of the six included in the survey) among non-residents, with 40% having visited as an adult. Colorado (64%) and Missouri (52%) are the top most-visited states.
 - Colorado (63%) and Missouri (38%) also garner the most interest in visiting from non-residents, while about the same percentage are interested in visiting Oklahoma (23%), Iowa (23%), Nebraska (21%) and Kansas (21%).
 - Respondents were asked to look at a list of positive destination attributes and select the destination for which they felt that it applied. Colorado and Missouri were selected most often for all attributes. The remaining states were all selected fairly equally. Kansas did score higher than Missouri, Nebraska, Oklahoma and Iowa on one attribute: art galleries and museums. *Note: Residents from each state were removed from analysis of their state as to not skew results.*

Respondents perceive Kansas, Nebraska, Oklahoma and Iowa to offer fairly similar experiences. One point of differentiation for Kansas appears to be art galleries and museums; therefore, highlighting these attractions and targeting the museum/art gallery-goer is recommended.



/ Summary

5. Among non-residents who are interested in visiting Kansas, the majority would visit with their spouse/significant other (60%), stay in a hotel (64%), and are interested in visiting during the summer (52%). Visiting historical attractions would be the top activity of interest (48%) followed by shopping (40%), culinary experiences (39%), visiting parks (38%) and outdoor/adventure activities (38%).

It is important to highlight all of the activities listed above in marketing as these are the top activities of interest among prospects. Additionally, there is opportunity to increase interest/visitation in the fall (only 14% are indicate an interest in visiting then) by showcasing the beauty of Kansas in fall and the different attractions/activities at that time of year.

6. Despite nearly all residents feeling pride in being a Kansas resident, they tend to be less enthusiastic about promoting Kansas as a vacation destination.
- More than 8 in 10 of residents (85%) indicate they are least somewhat proud to be a Kansas resident, with 63% being extremely or very proud.
 - The Net Promoter Score among Kansas residents is -4, meaning there are more residents who fall into the Detractor category than Promoter category when asked if they are likely to recommend Kansas as a place to visit to their family and friends.
 - 9 in 10 residents (88%) recognize that tourism is important to the economic prosperity, yet the majority (57%) don't believe it impacts their life as a resident.

There is opportunity for education around the role and benefits of the Kansas Tourism Office as well as the value of the visitor economy and how it positively impacts their life as a resident.



/ Kansas KPIs

- 67% of residents and 40% of non-residents have vacationed in Kansas as an adult.
- 41% of residents and 21% of non-residents are interested in taking an overnight leisure trip to Kansas during the next two years.
- Among those interested, 62% of residents and 49% of non-residents indicate a *likelihood* to take an overnight leisure trip to Kansas during the next two years.
- 32% of residents and 20% of non-residents recall seeing/hearing advertising during the past two years.
- The NPS among residents is -4 and among non-residents who have vacationed in Kansas is -15.



Summary With Charts

NON-RESIDENTS

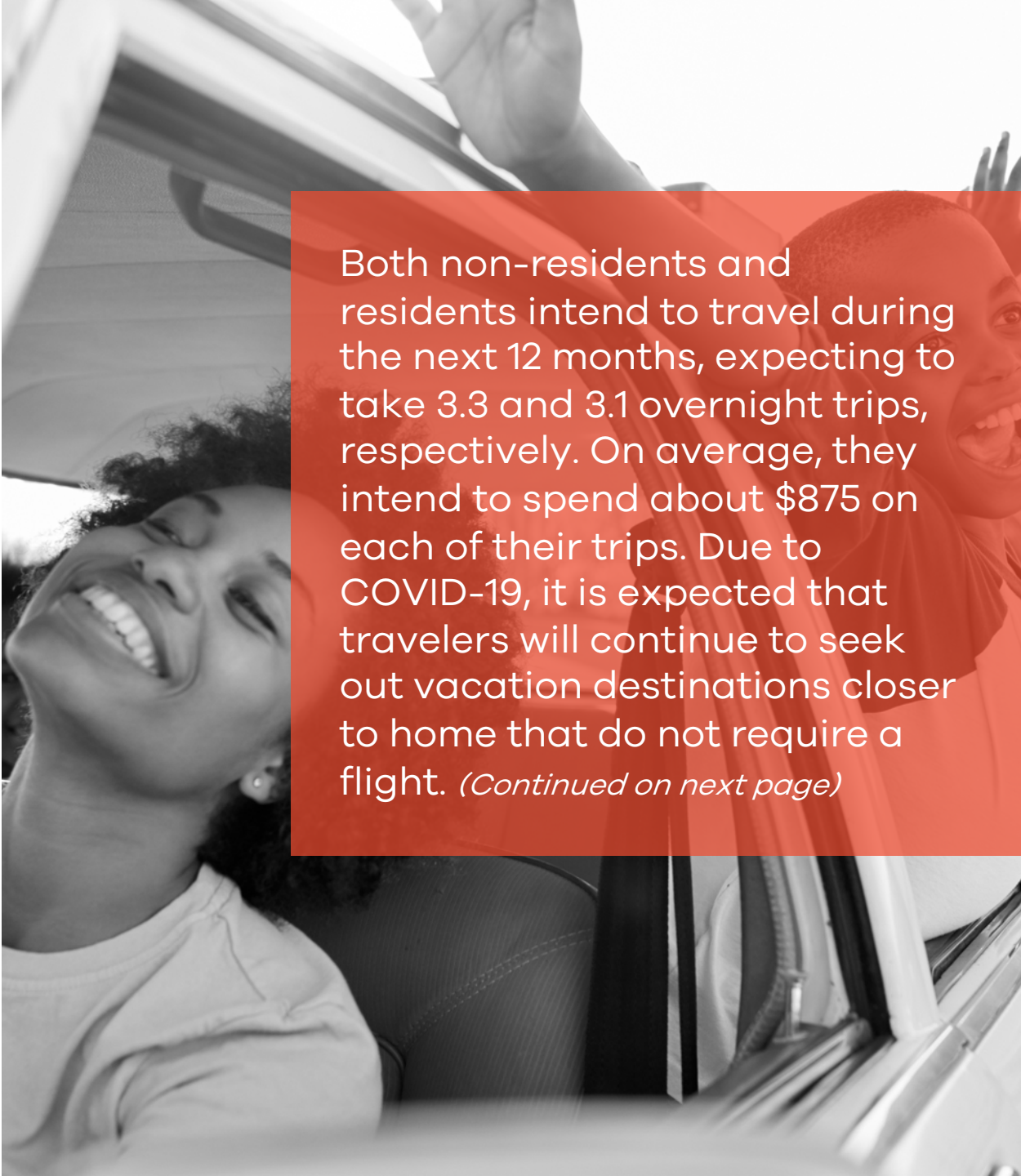
3.3

**AVERAGE NUMBER OF OVERNIGHT
LEISURE TRIPS EXPECT TO TAKE
DURING NEXT 12 MONTHS**

\$2,886

**AVERAGE AMOUNT EXPECT TO SPEND
ON OVERNIGHT LEISURE DURING NEXT
12 MONTHS**

Question / How many overnight leisure trips do you expect to take during the next 12 months?
Question / Approximately how much do you expect to spend on overnight leisure travel during the next 12 months?



Both non-residents and residents intend to travel during the next 12 months, expecting to take 3.3 and 3.1 overnight trips, respectively. On average, they intend to spend about \$875 on each of their trips. Due to COVID-19, it is expected that travelers will continue to seek out vacation destinations closer to home that do not require a flight. *(Continued on next page)*

RESIDENTS

3.1

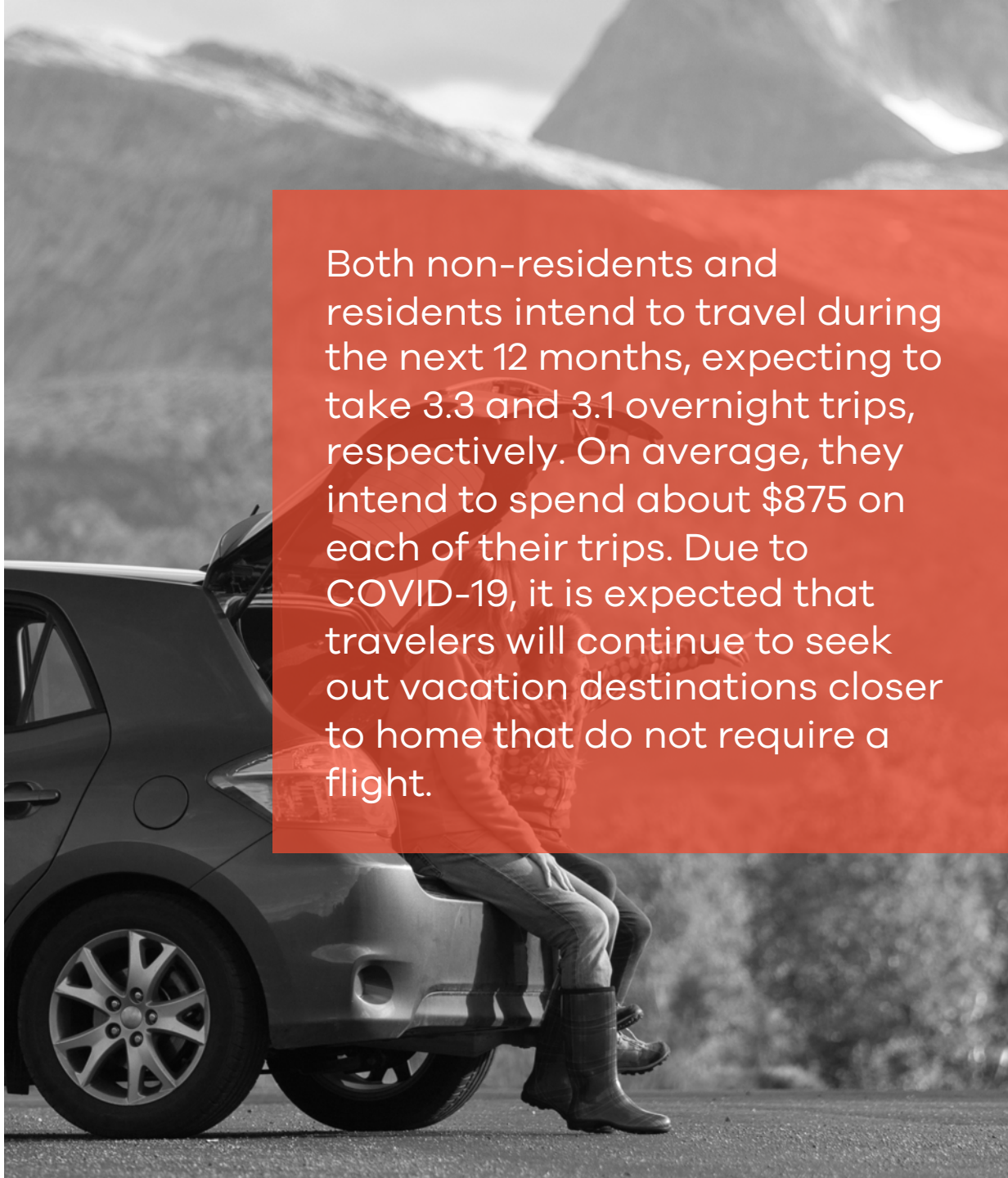
**AVERAGE NUMBER OF OVERNIGHT
LEISURE TRIPS EXPECT TO TAKE
DURING NEXT 12 MONTHS**

\$2,744

**AVERAGE AMOUNT EXPECT TO SPEND
ON OVERNIGHT LEISURE DURING NEXT
12 MONTHS**

Question / How many overnight leisure trips do you expect to take during the next 12 months?

Question / Approximately how much do you expect to spend on overnight leisure travel during the next 12 months?



Both non-residents and residents intend to travel during the next 12 months, expecting to take 3.3 and 3.1 overnight trips, respectively. On average, they intend to spend about \$875 on each of their trips. Due to COVID-19, it is expected that travelers will continue to seek out vacation destinations closer to home that do not require a flight.

Safety, Friendliness and Accessibility are Kansas' top-rated attributes.

Both groups (residents and non-residents) identified the same top three rated attributes for Kansas: safety, friendly residents and accessibility. Not surprisingly, residents rated Kansas higher than non-residents on all attributes.

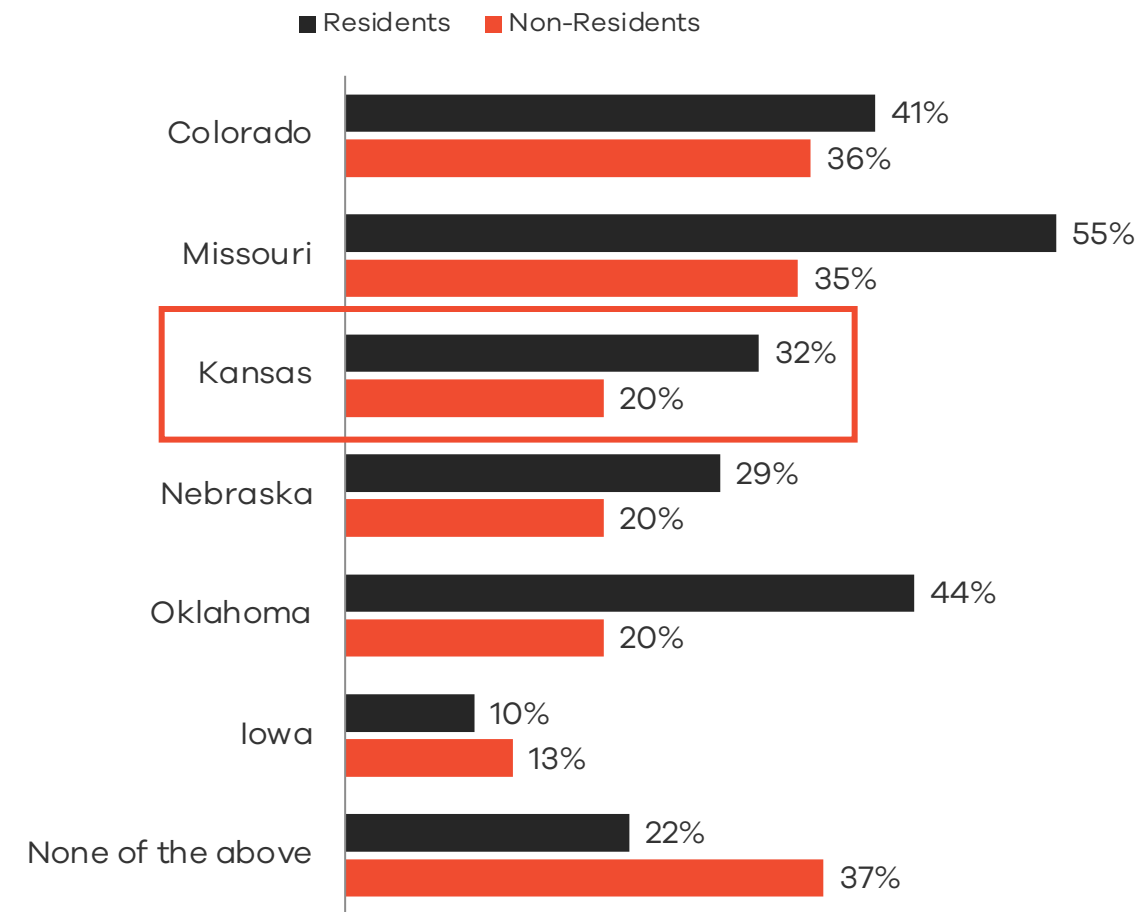
Top-2 Box (Very Good/Excellent)	Kansas Residents (n=150)	Non-Residents (n=500)
Friendly residents	71%	42%
Safe	67%	47%
Accessible for travelers	65%	39%
Good value for the money	55%	34%
A relaxing destination	49%	30%
Diverse and quality restaurants	44%	24%
Diverse and quality hotels	42%	25%
History/heritage attractions	40%	26%
A family vacation destination	39%	24%
Good climate/weather	35%	19%
Unique culinary experiences	33%	19%
A quality vacation destination	32%	22%
Live music/concerts/theatre	31%	19%
Art galleries/museums	30%	19%
A couples/adult vacation destination	28%	19%
A lot to see and do	28%	21%

Question / Please indicate how well you feel Kansas rates on each of the attributes listed below. We are looking for your perception, even if you have never visited.



One-third of residents (32%) and 1 in 5 non-residents (20%) recall seeing or hearing advertising for Kansas in the past two years.

Recall Seeing/Hearing Advertising During Past Two Years

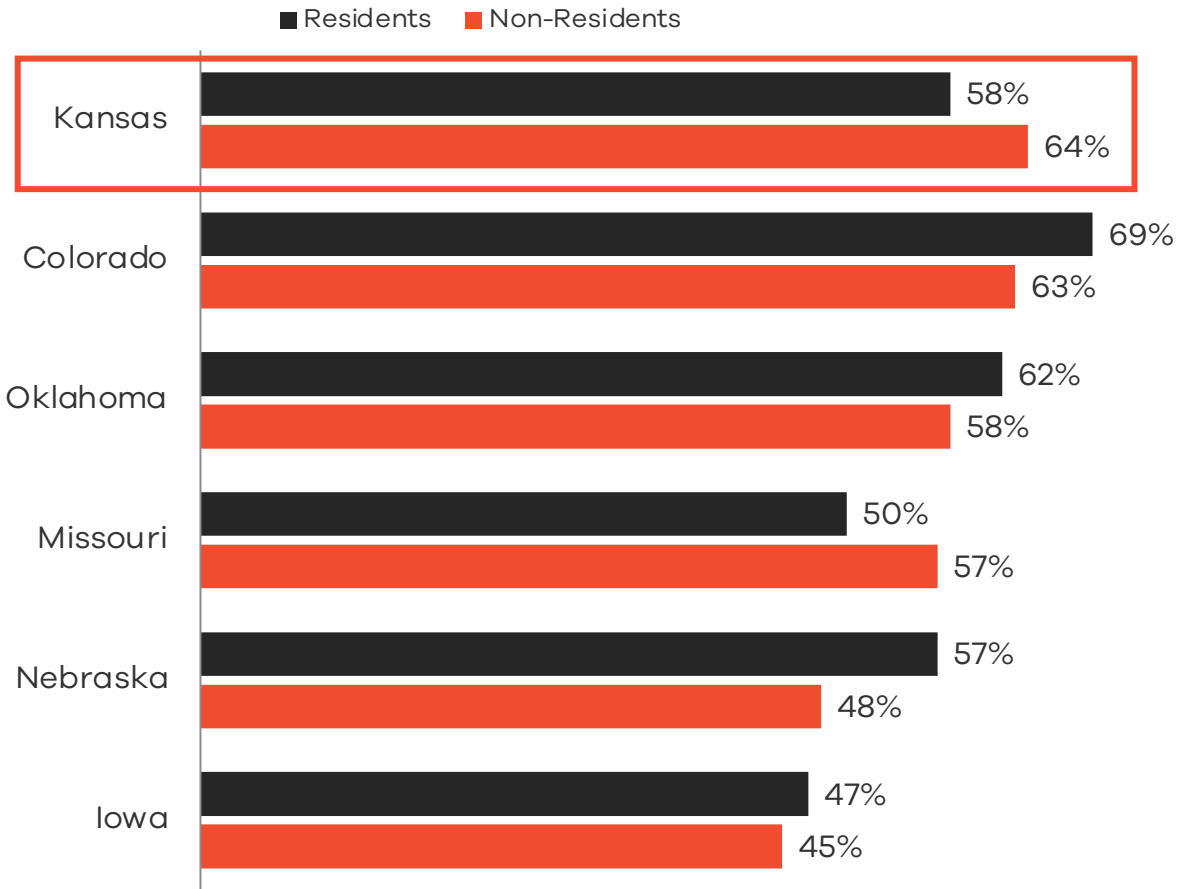


Question / From which of the following states, if any, do you recall seeing or hearing travel advertising in the past two years?
Base: Non-residents (n=500) and residents (n=150)



Among those who do recall advertising, more than half (58% of residents and 64% of non-residents) indicate it caused them to be more interested in taking a vacation to Kansas.

Advertising Caused an Increase in Interest

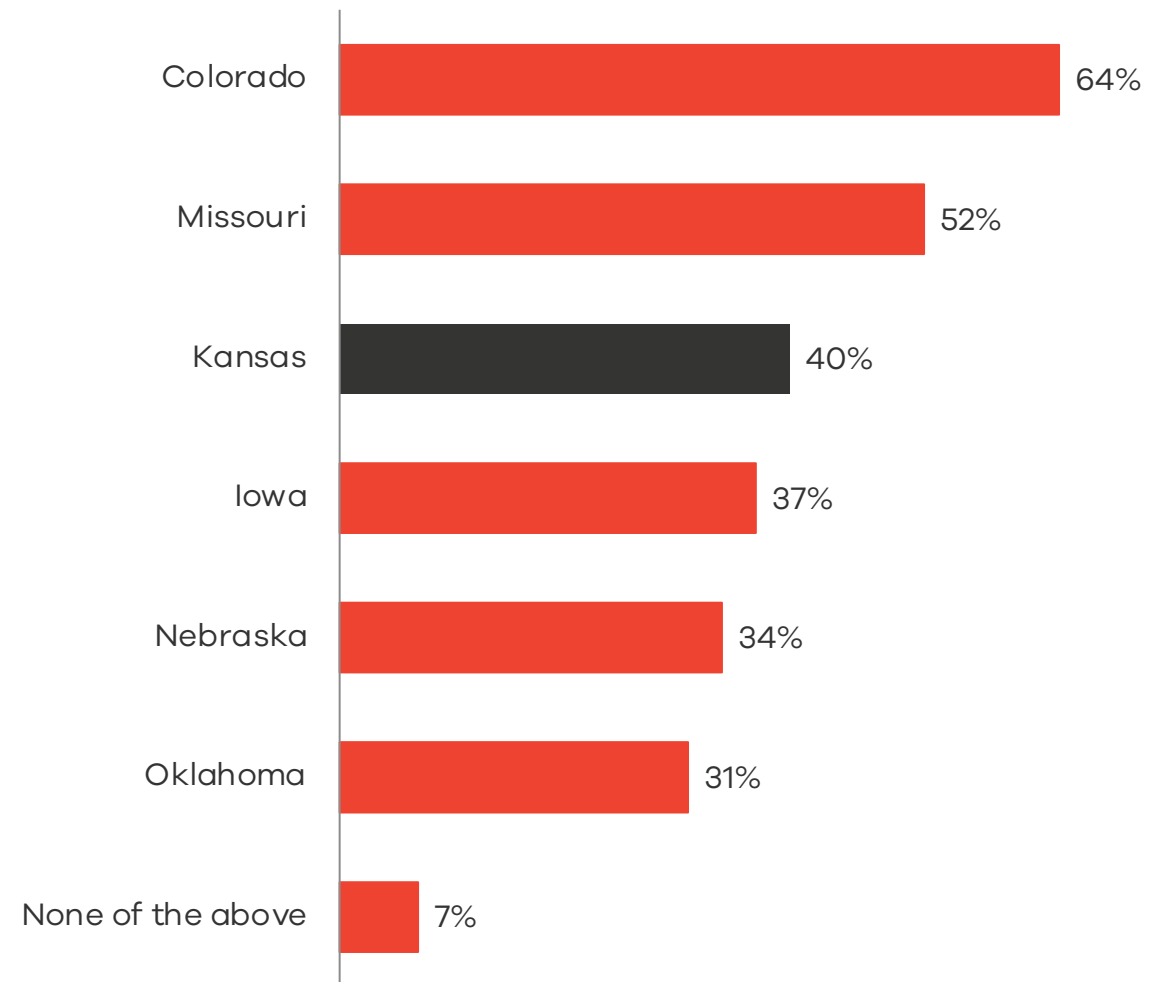


Question / Did the travel advertising you saw or heard cause you to be more interested in visiting that destination? Base: Non-residents and residents who saw advertising (Note: Smaller sample sizes)

Non-residents rate Colorado and Missouri the highest of the six states in terms of past visitation, interest in visiting, likelihood to visit and on most attributes included in the survey, while the remaining states (Kansas, Iowa, Nebraska and Oklahoma) rate fairly similarly on these metrics.

Along with Iowa, Kansas is the third most visited state among non-residents, with 40% having visited as an adult. Colorado (64%) and Missouri (52%) are the top most-visited states. *(Continued on next page)*

States Visited for Overnight Leisure as an Adult

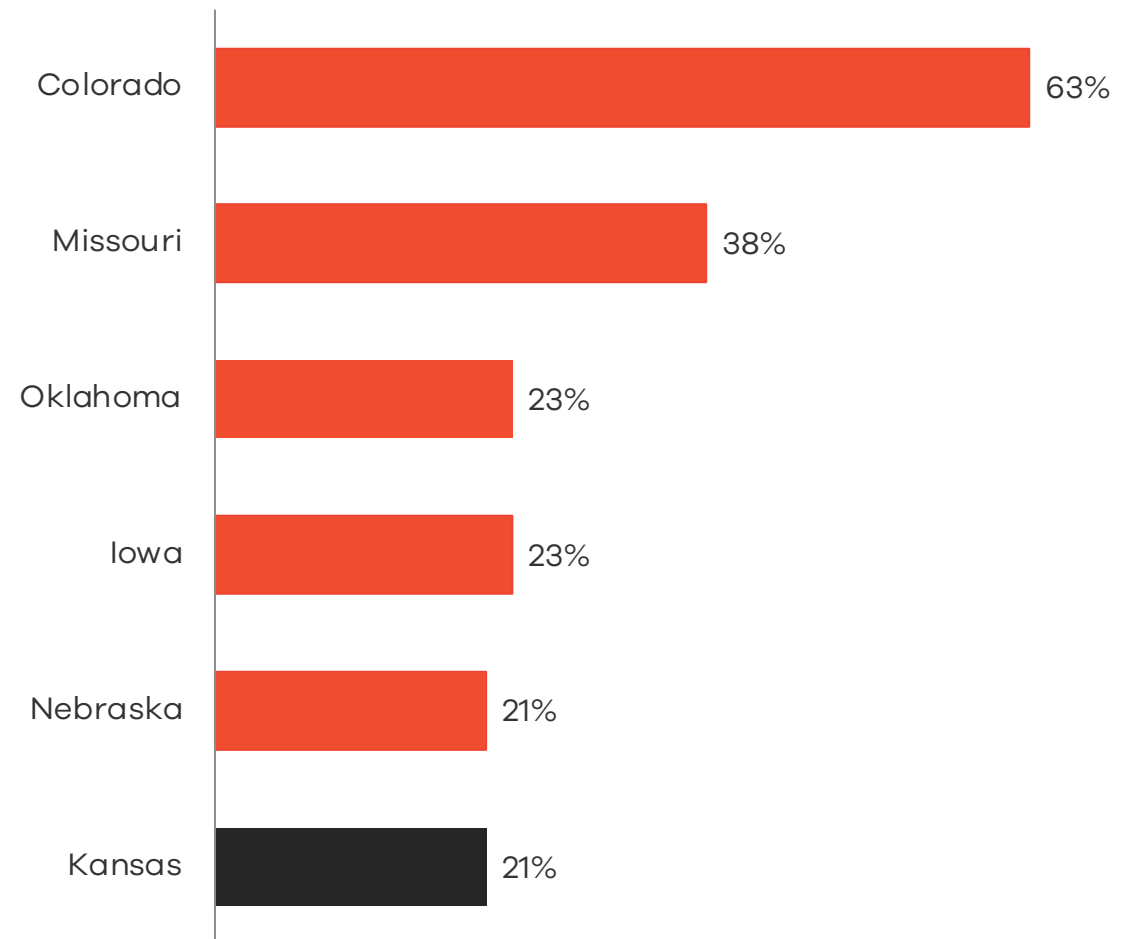


Question / Which of the following states, if any, have you visited for an overnight leisure trip as an adult? If you have taken an overnight leisure trip within the state in which you live, please select it. Base: Non-residents (n=500)

Non-residents rate Colorado and Missouri the highest of the six states in terms of past visitation, interest in visiting, likelihood to visit and on most attributes included in the survey, while the remaining states (Kansas, Iowa, Nebraska and Oklahoma) rate fairly similarly on these metrics.

Colorado (63%) and Missouri (38%) garner the most interest in visiting from non-residents, while about the same percentage are interested in visiting Oklahoma (23%), Iowa (23%), Nebraska (21%) and Kansas (21%).
(Continued on next page)

States Interested in Visiting During Next Two Years



Question / Including the state in which you live, please indicate your level of interest in taking an overnight leisure trip to each of the following destinations during the next two years? Base: Non-residents (n=500)

Non-residents rate Colorado and Missouri the highest of the six states in terms of past visitation, interest in visiting, likelihood to visit and on most attributes included in the survey, while the remaining states (Kansas, Iowa, Nebraska and Oklahoma) rate fairly similarly on these metrics.

Respondents were asked to look at a list of positive destination attributes and select the destination for which they felt that it applied. Colorado and Missouri were selected most often for all attributes.
(Continued on next page)

	Kansas n=500	Colorado n=506	Missouri n=527	Nebraska n=587	Oklahoma n=570	Iowa n=560
Safe	55%	60%	53%	56%	54%	55%
Accessible for travelers	52%	64%	56%	51%	54%	49%
Friendly residents	48%	52%	48%	47%	44%	43%
Good value for the money	43%	44%	46%	41%	40%	40%
Diverse and quality hotels	39%	63%	47%	34%	35%	31%
History/heritage attractions	36%	52%	48%	33%	42%	31%
Diverse and quality restaurants	33%	60%	44%	28%	31%	28%
A family vacation destination	34%	62%	49%	33%	34%	30%
A relaxing destination	31%	62%	44%	33%	32%	28%
Good climate/weather	27%	50%	31%	25%	30%	22%
Art galleries/museums	28%	40%	37%	20%	22%	18%
Live music/concerts/theatre	24%	47%	39%	18%	21%	16%
A lot to see and do	25%	71%	45%	22%	26%	18%
A quality vacation destination	23%	69%	39%	22%	24%	20%
Unique culinary experiences	22%	40%	29%	17%	18%	16%
A couples/adult vacation destination	21%	53%	32%	19%	20%	18%

Bold indicates the top selected destinations for each attribute.

Question / Based on your perception, for each attribute listed, please select the destination(s) for which you feel it applies. You can select as many destinations as you'd like for each attribute.

Non-residents rate Colorado and Missouri the highest of the six states in terms of past visitation, interest in visiting, likelihood to visit and on most attributes included in the survey, while the remaining states (Kansas, Iowa, Nebraska and Oklahoma) rate fairly similarly on these metrics.

The remaining states were all selected fairly equally. Kansas did score higher than Missouri, Nebraska, Oklahoma and Iowa on one attribute: art galleries and museums.

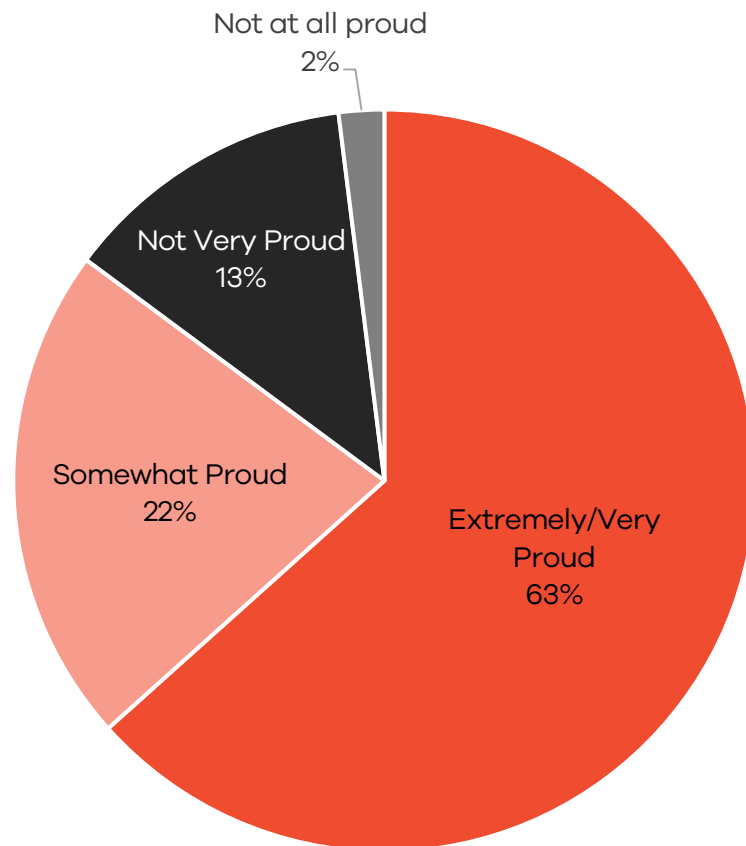
Note: Residents from each state were removed from analysis of their state as to not skew results.

	Kansas n=500	Nebraska n=587	Oklahoma n=570	Iowa n=560
Safe	55%	56%	54%	55%
Accessible for travelers	52%	51%	54%	49%
Friendly residents	48%	47%	44%	43%
Good value for the money	43%	41%	40%	40%
Diverse and quality hotels	39%	34%	35%	31%
History/heritage attractions	36%	33%	42%	31%
Diverse and quality restaurants	33%	28%	31%	28%
A family vacation destination	34%	33%	34%	30%
A relaxing destination	31%	33%	32%	28%
Good climate/weather	27%	25%	30%	22%
Art galleries/museums	28%	20%	22%	18%
Live music/concerts/theatre	24%	18%	21%	16%
A lot to see and do	25%	22%	26%	18%
A quality vacation destination	23%	22%	24%	20%
Unique culinary experiences	22%	17%	18%	16%
A couples/adult vacation destination	21%	19%	20%	18%

Question / Based on your perception, for each attribute listed, please select the destination(s) for which you feel it applies. You can select as many destinations as you'd like for each attribute.

85%

**OF RESIDENTS FEEL AT LEAST SOMEWHAT PROUD
TO BE A KANSAS RESIDENT**



Question / Please indicate the level of pride you feel in being a resident of Kansas.

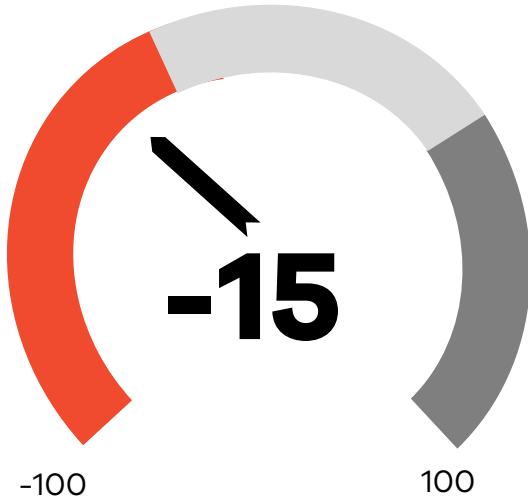


**Despite nearly all residents
feeling pride in being a
Kansas resident, they tend
to be less enthusiastic
about promoting Kansas as
a vacation destination.**

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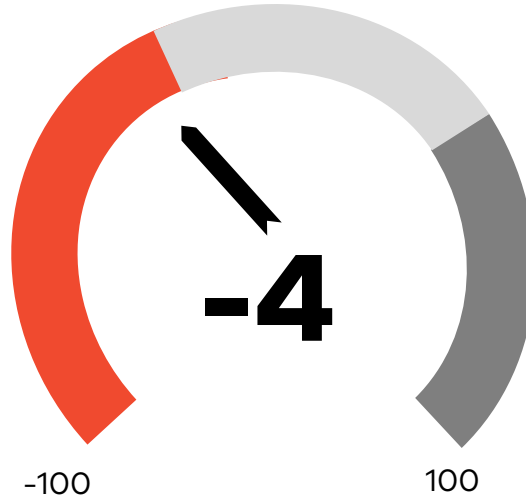
NET PROMOTER SCORE

Non-Residents (Have Visited)



27% Promoters
28% Passives
42% Detractors

Residents



33% Promoters
29% Passives
37% Detractors

Net Promoter Score = Promoters (%) – Detractors (%)

Despite nearly all residents feeling pride in being a Kansas resident, they tend to be less enthusiastic about promoting Kansas as a vacation destination.

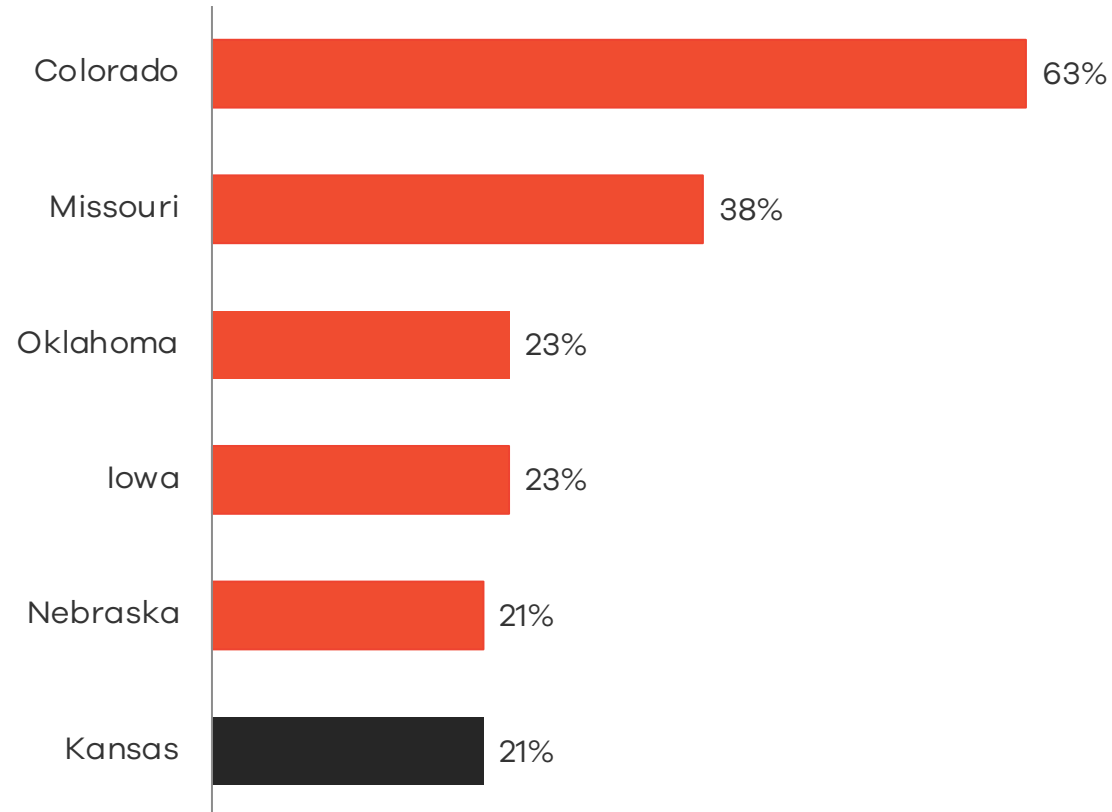
The Net Promoter Score among Kansas residents is -4, meaning there are more residents who fall into the Detractor category than Promoter category when asked if they are likely to recommend Kansas as a place to visit to their family and friends.

Interest/Likelihood in Visiting Kansas

NON-RESIDENTS

Colorado And Missouri Garner The Most Interest From Non-Residents, While About The Same Percentage Are Interested In Visiting Oklahoma, Iowa, Nebraska And Kansas

States Interested in Visiting During Next Two Years
% Extremely/Very Interested

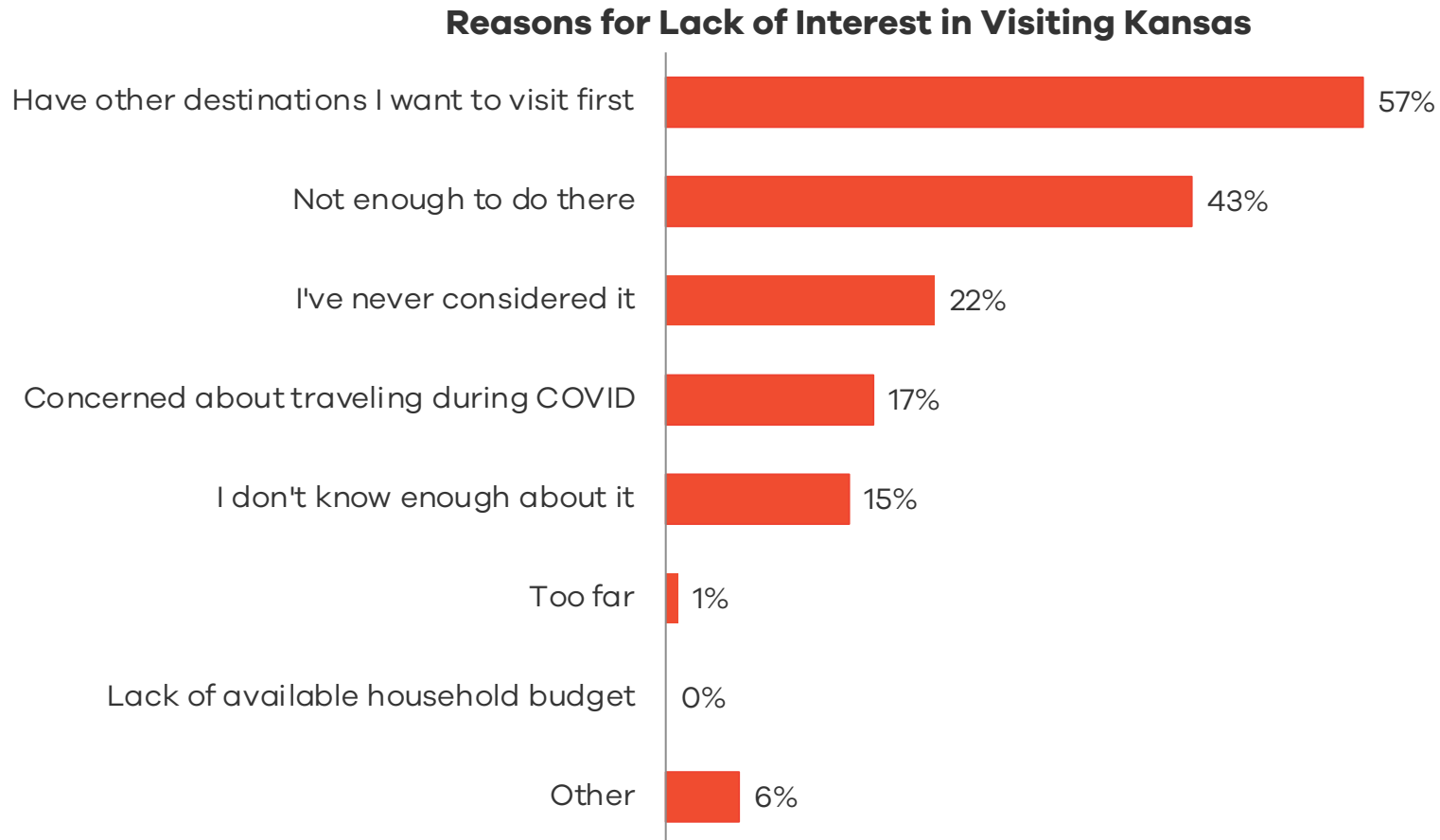


Top Cities Of Interest Within Kansas



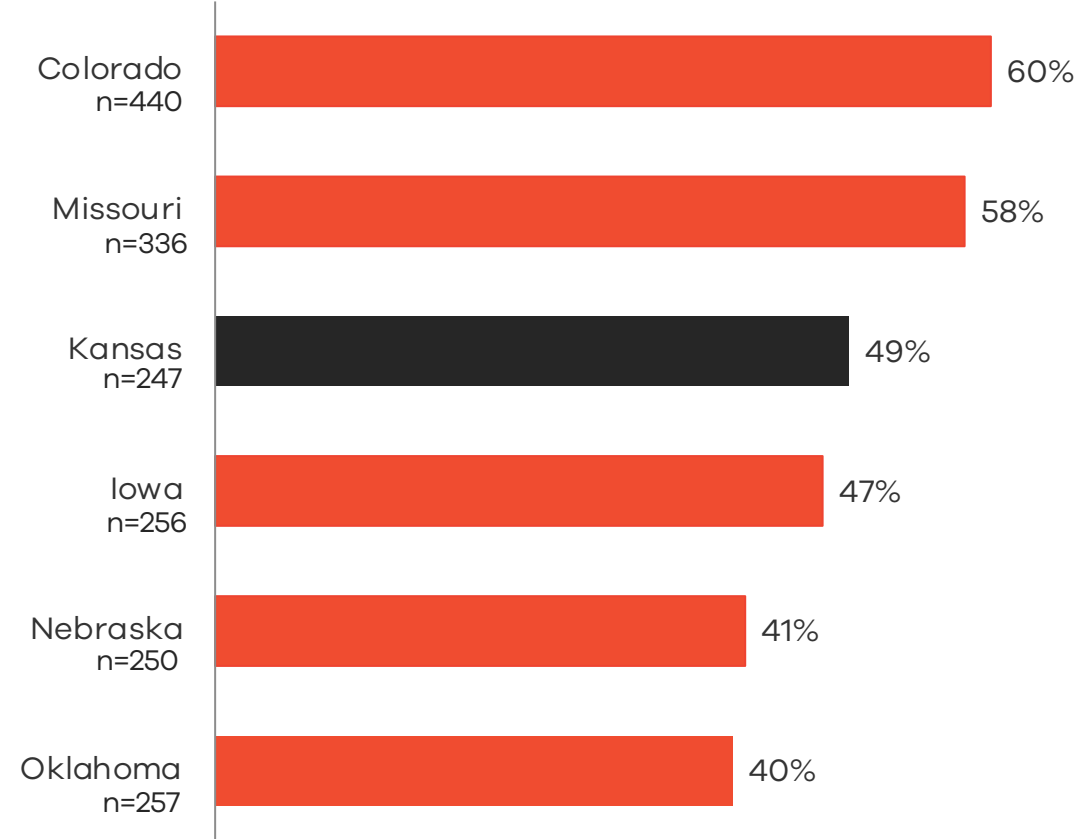
Question / Please list up to three destinations/cities within Kansas you are most interested in visiting.
Base: All respondents interested in visiting Kansas

Preference For Other Destinations Or A Lack Of Activities Are The Primary Reasons For Non-interest In Visiting Kansas



Half Of Non-Residents Indicate A Likelihood To Visit Kansas In The Next Two Years

States Likely to Visit During Next Two Years (Among those Interested)
% Extremely/Likely



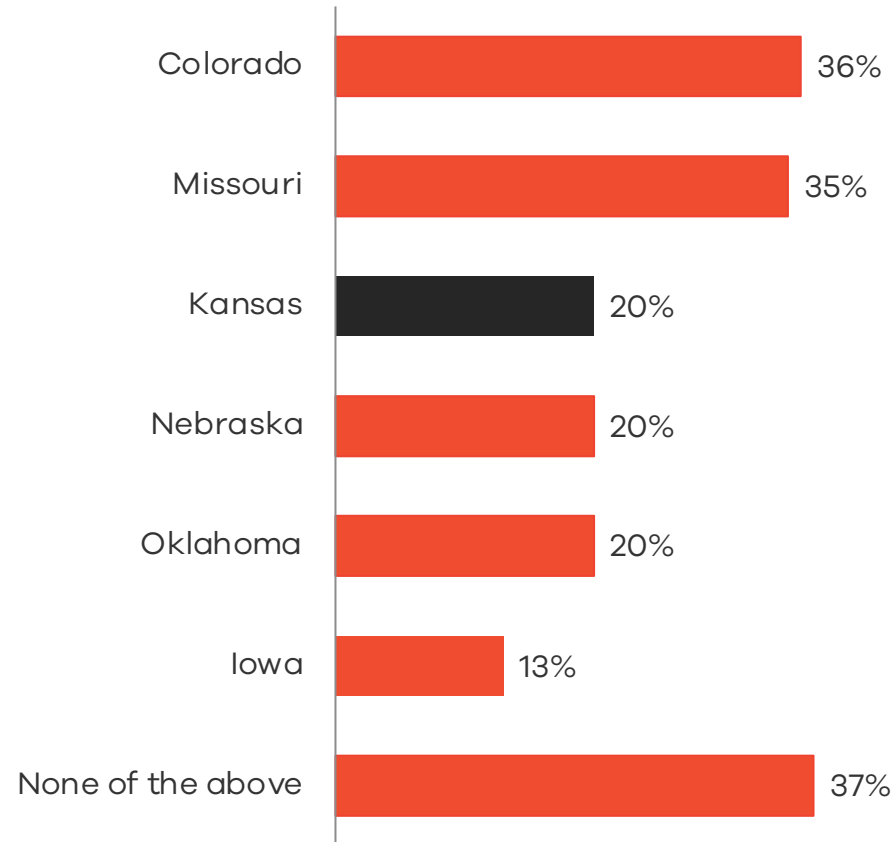
Question / Including the state in which you live, how likely are you to actually take a vacation to each of the following destination(s) for an overnight leisure trip during the next two years?
Base: Non-residents interested in visiting states

Kansas Advertising

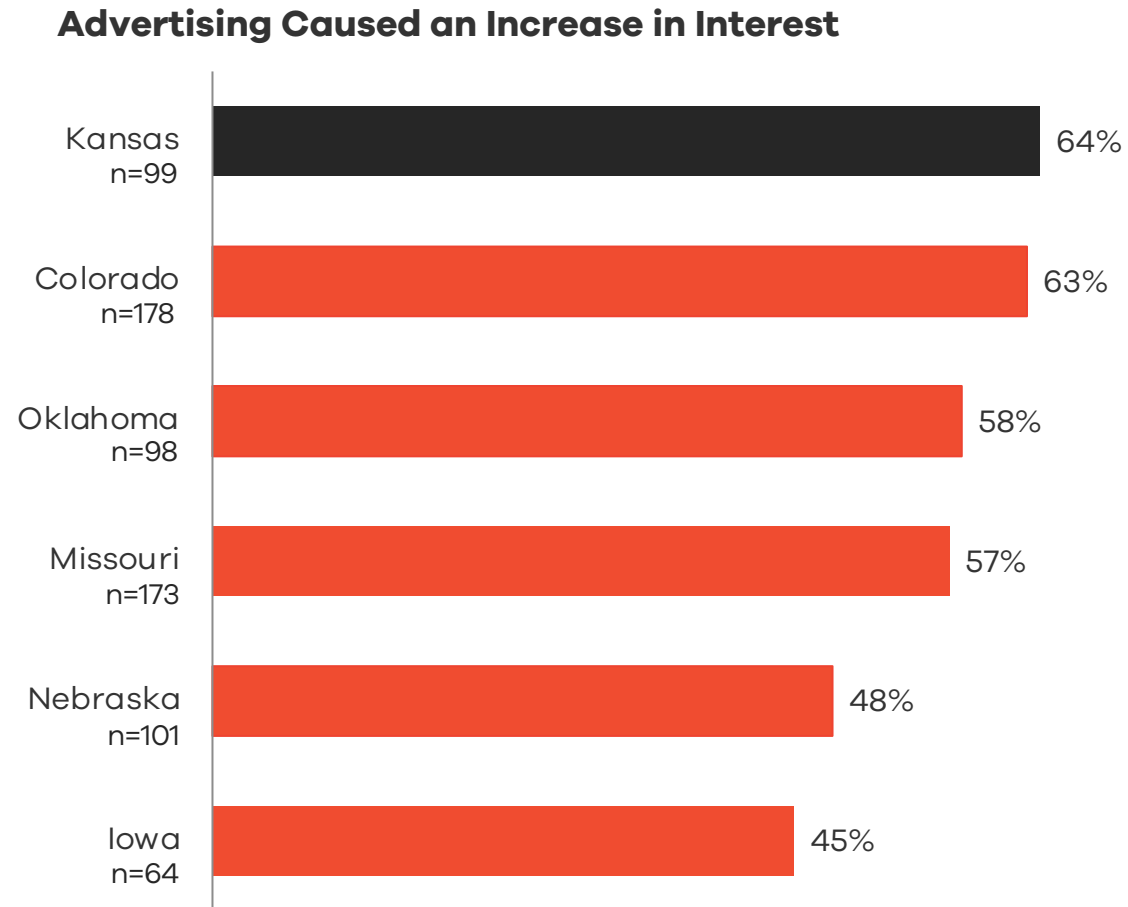
NON-RESIDENTS

1 In 5 Non-residents Recall Advertising For Kansas

Recall Seeing/Hearing Advertising During Past Two Years



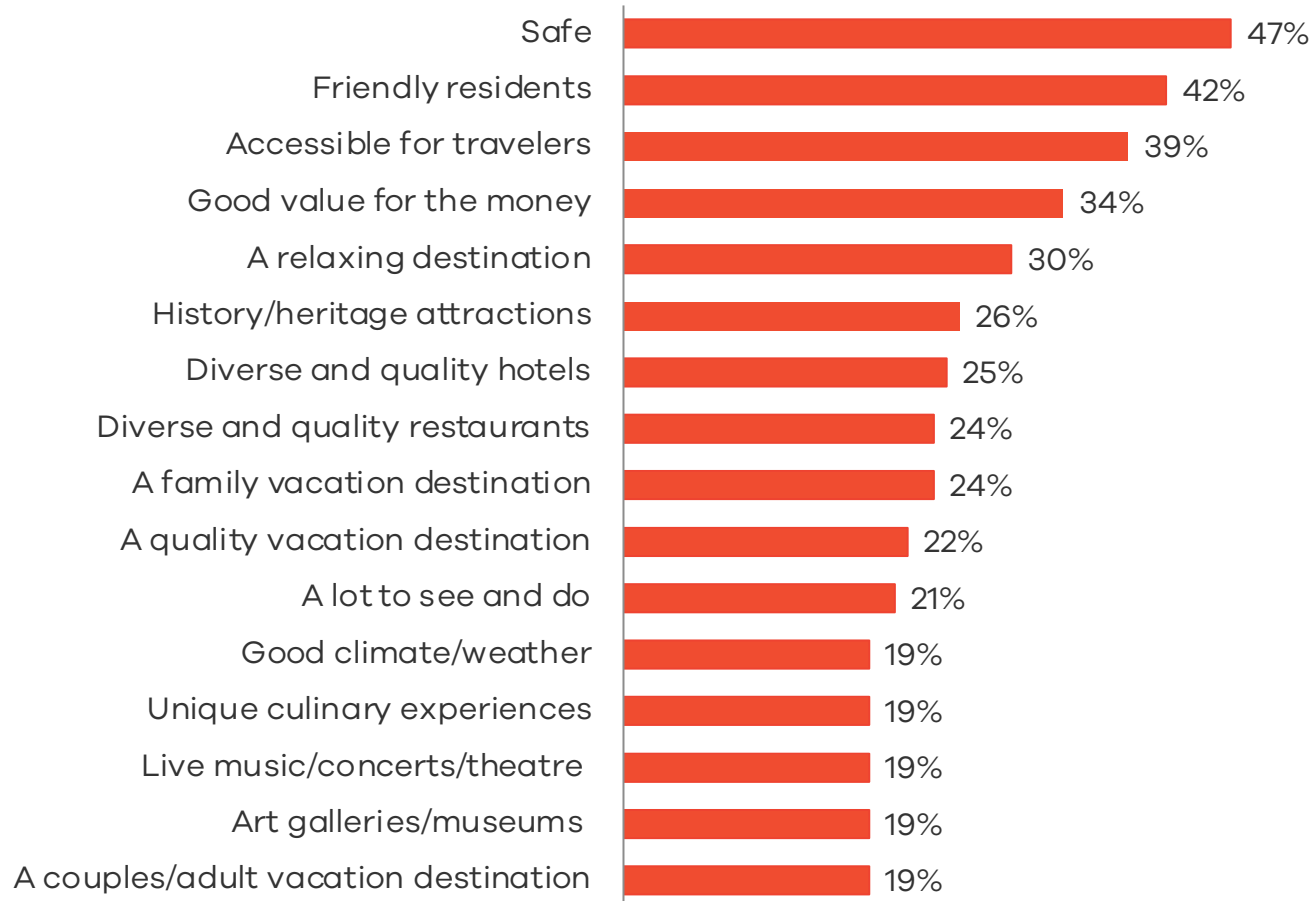
Among Those Who Saw Kansas Advertising, Two-Thirds Said It Made Them More Interested In Visiting



Perceptions of Kansas and Competitive Destinations

Non-Residents Rate Kansas Highest on Being Safe, Having Friendly Residents and Being Accessible

Kansas Attributes (Rated Very Good/Excellent)



Question / Please indicate how well you feel Kansas rates on each of the attributes listed below. We are looking for your perception, even if you have never visited. Base: Non-residents (n=500)

Colorado and Missouri Score Higher Than Other States On Almost All Attributes

	Kansas n=500	Colorado n=506	Missouri n=527	Nebraska n=587	Oklahoma n=570	Iowa n=560
Safe	55%	60%	53%	56%	54%	55%
Accessible for travelers	52%	64%	56%	51%	54%	49%
Friendly residents	48%	52%	48%	47%	44%	43%
Good value for the money	43%	44%	46%	41%	40%	40%
Diverse and quality hotels	39%	63%	47%	34%	35%	31%
History/heritage attractions	36%	52%	48%	33%	42%	31%
Diverse and quality restaurants	33%	60%	44%	28%	31%	28%
A family vacation destination	34%	62%	49%	33%	34%	30%
A relaxing destination	31%	62%	44%	33%	32%	28%
Good climate/weather	27%	50%	31%	25%	30%	22%
Art galleries/museums	28%	40%	37%	20%	22%	18%
Live music/concerts/theatre	24%	47%	39%	18%	21%	16%
A lot to see and do	25%	71%	45%	22%	26%	18%
A quality vacation destination	23%	69%	39%	22%	24%	20%
Unique culinary experiences	22%	40%	29%	17%	18%	16%
A couples/adult vacation destination	21%	53%	32%	19%	20%	18%

Bold indicates the top selected destinations for each attribute.

Question / Based on your perception, for each attribute listed, please select the destination(s) for which you feel it applies. You can select as many destinations as you'd like for each attribute.

Kansas, Nebraska, Oklahoma And Iowa Score Very Similarly On Most Attributes; Kansas Scores Higher On “Art Galleries/Museums”

	Kansas n=500	Nebraska n=587	Oklahoma n=570	Iowa n=560
Safe	55%	56%	54%	55%
Accessible for travelers	52%	51%	54%	49%
Friendly residents	48%	47%	44%	43%
Good value for the money	43%	41%	40%	40%
Diverse and quality hotels	39%	34%	35%	31%
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Unique culinary experiences	22%	17%	18%	16%
A couples/adult vacation destination	21%	19%	20%	18%

Question / Based on your perception, for each attribute listed, please select the destination(s) for which you feel it applies. You can select as many destinations as you'd like for each attribute.

Top Words Associated With Kansas



Question / What are the first three words that come to mind when you think of Kansas?
Base: All Respondents

Top Words Associated With Colorado



Top Words Associated With Missouri



Top Words Associated With Iowa



Question / What are the first three words that come to mind when you think of Iowa?
Base: All Respondents

Top Words Associated With Nebraska



Question / What are the first three words that come to mind when you think of Nebraska?
Base: All Respondents

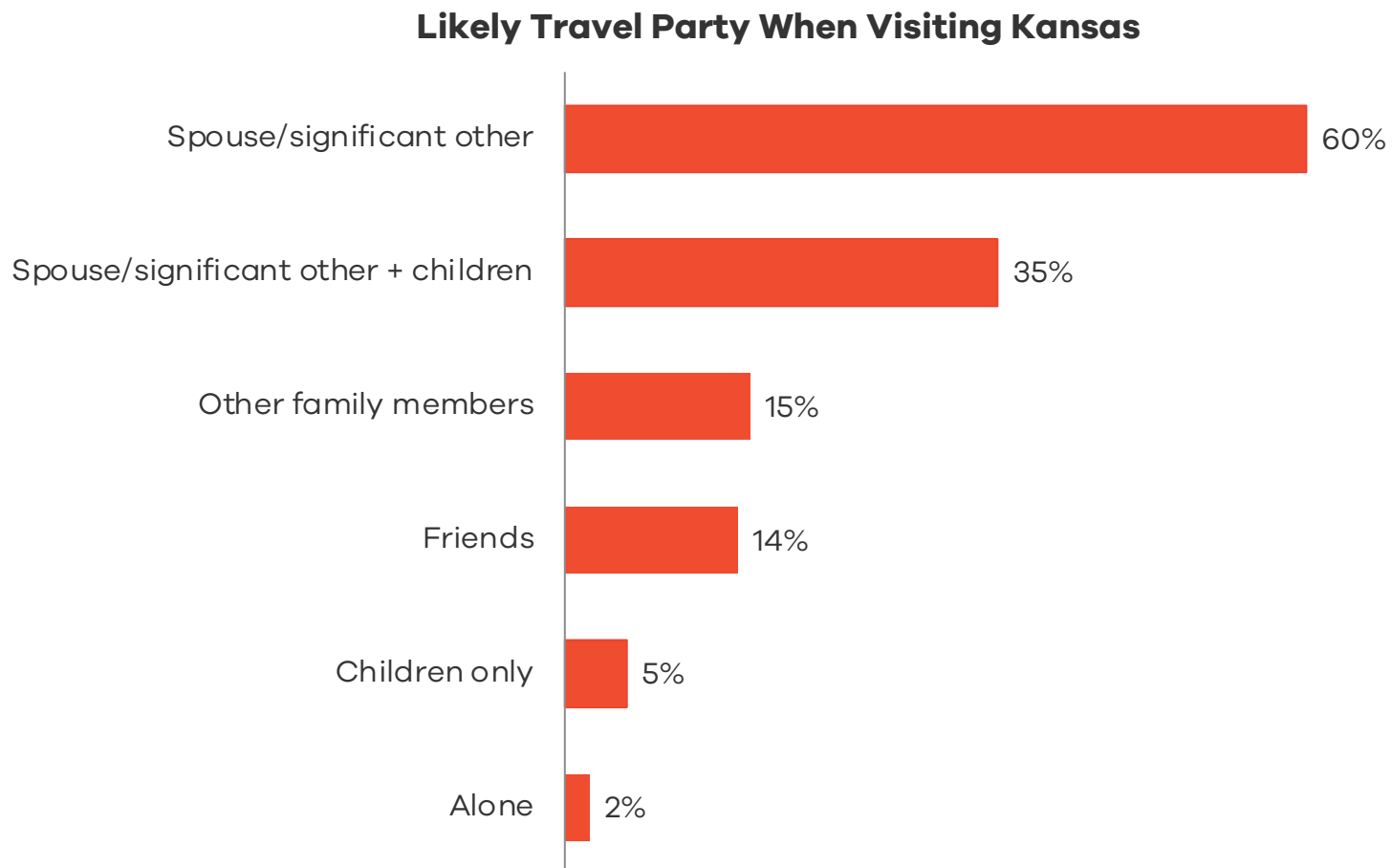
Top Words Associated With Oklahoma



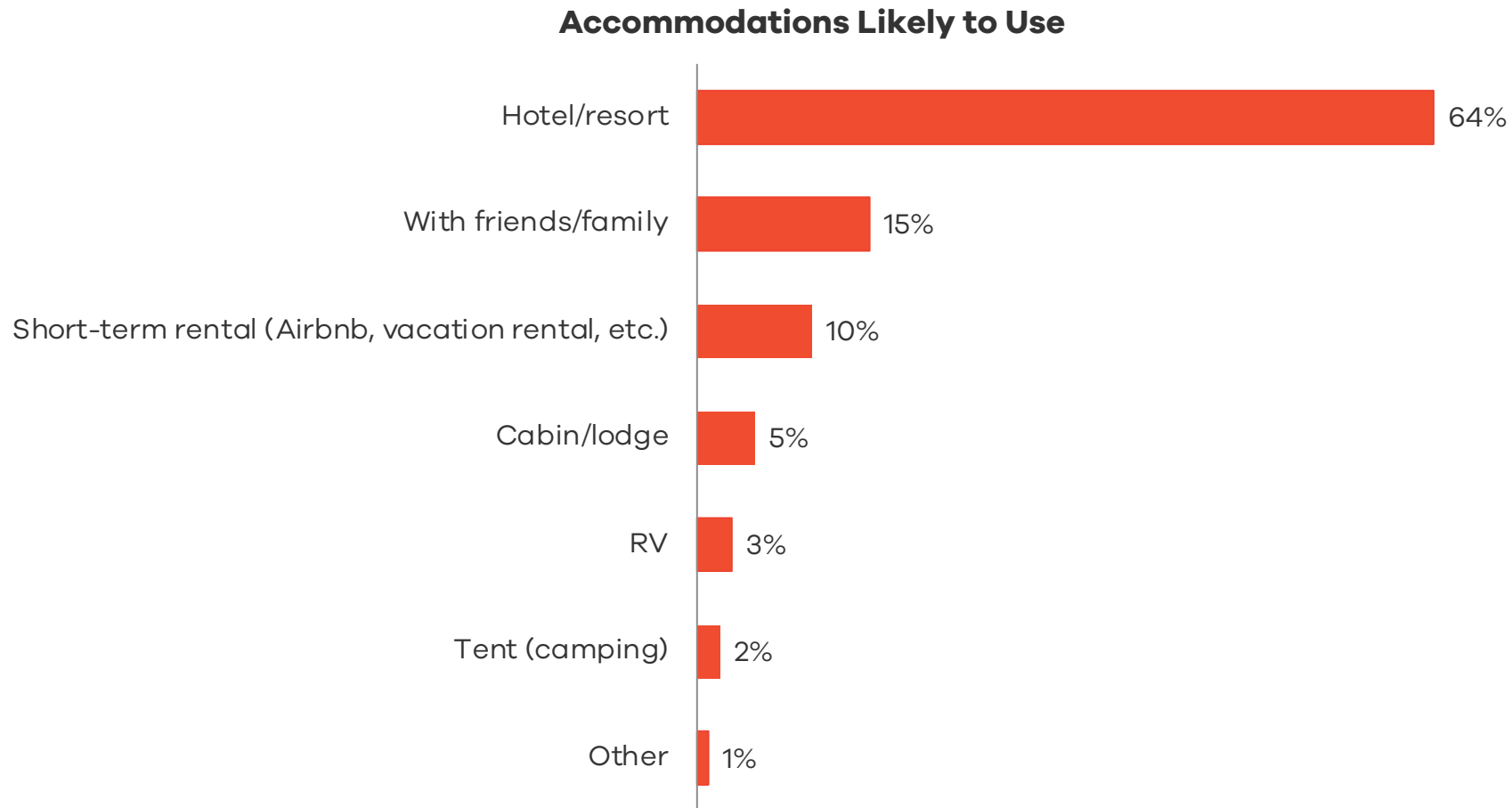
Vacationing in Kansas

NON-RESIDENTS

Non-Residents Interested In Visiting Kansas Would Most Likely Visit With Their Significant Other

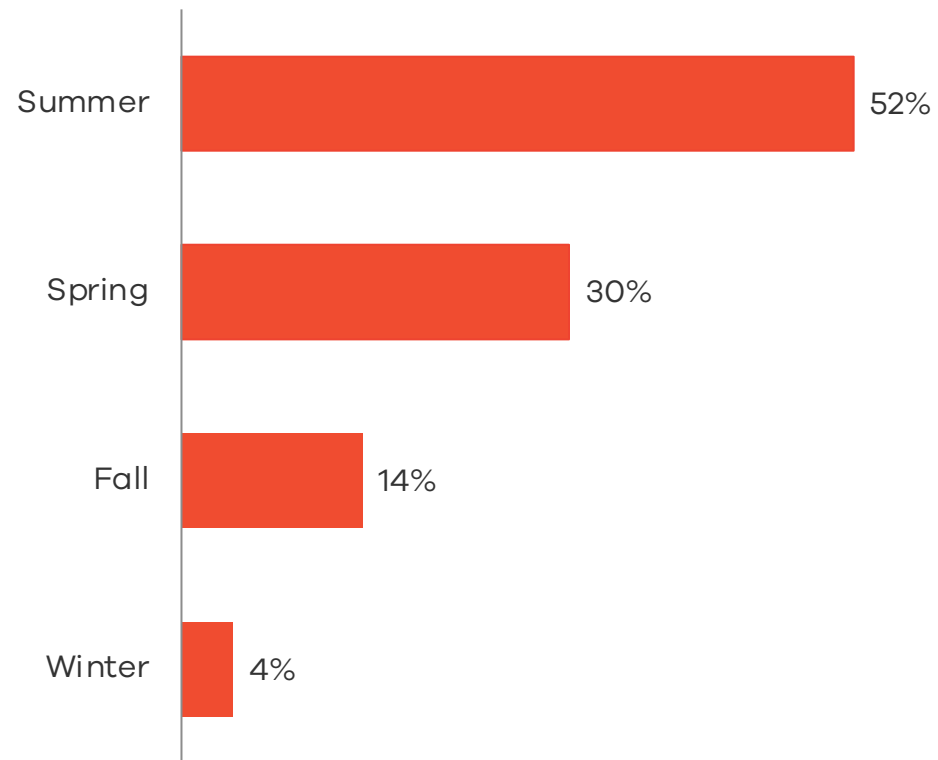


The Majority Would Likely Stay In A Hotel

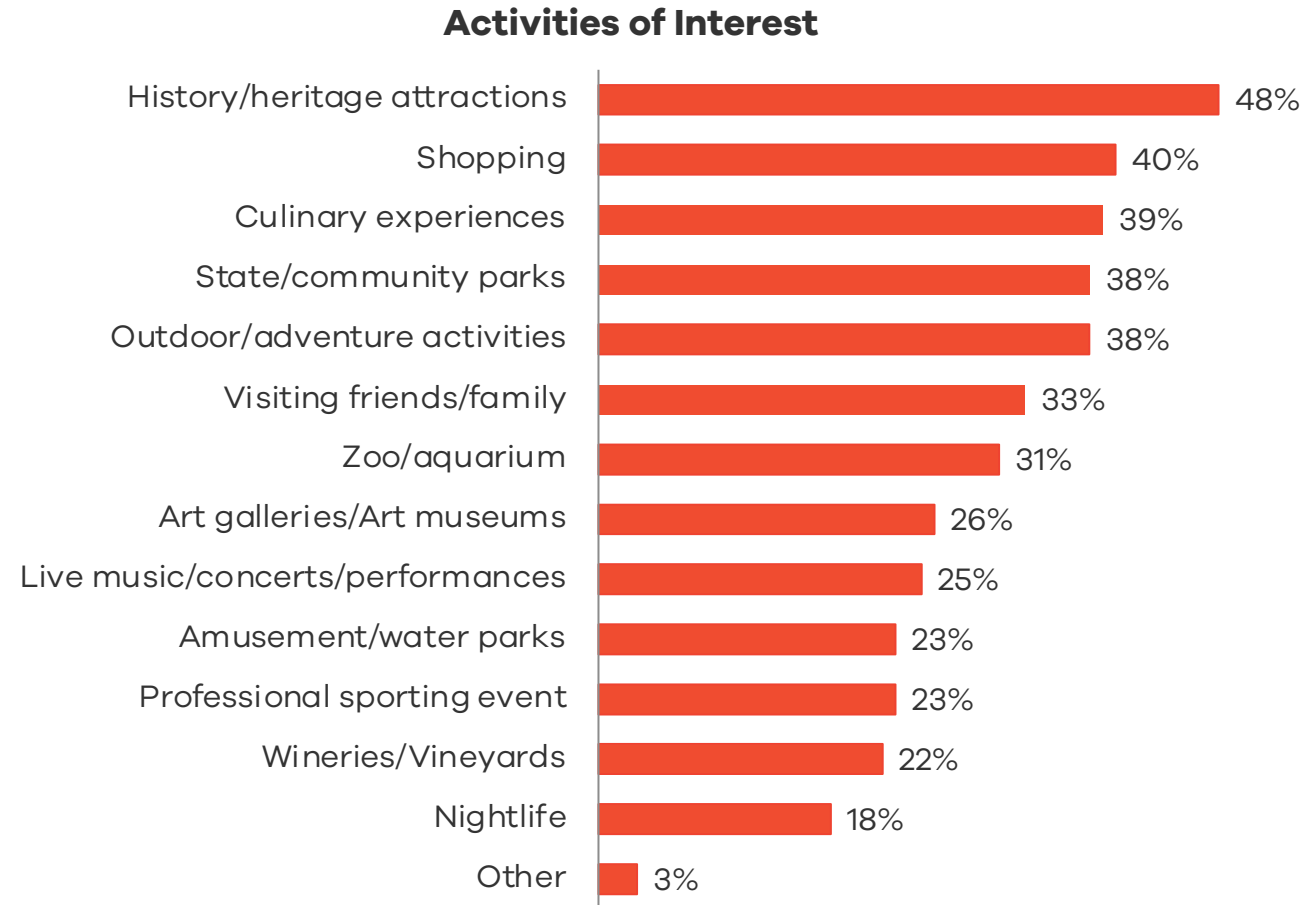


Summer And Spring Are The Most Popular Seasons

Season In Which Would Vacation in Kansas

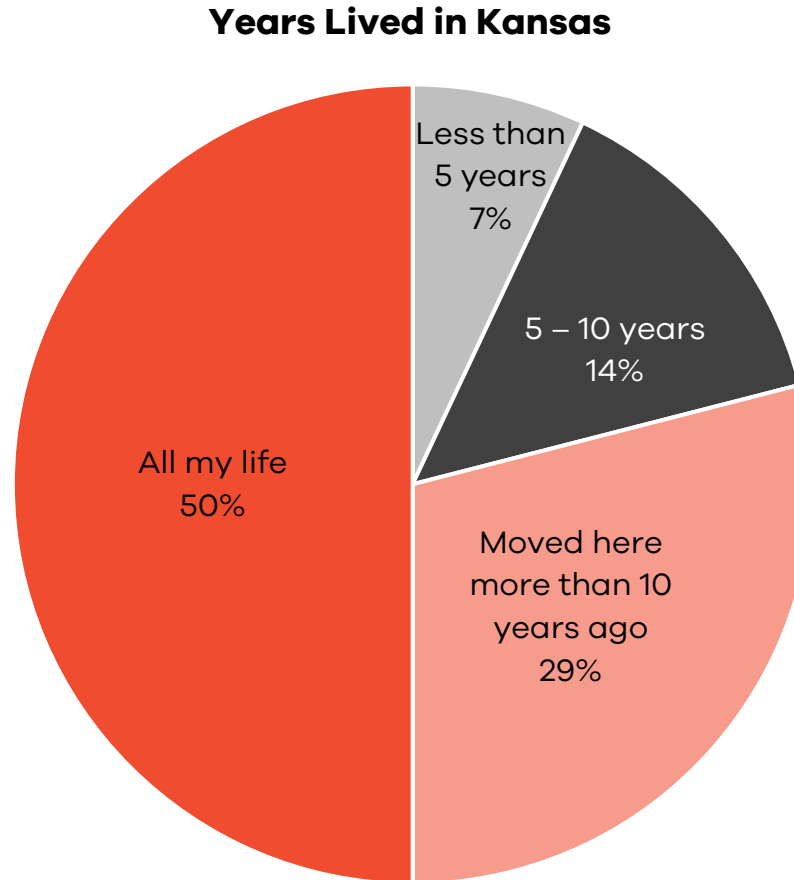


Historic Attractions Are The Top Activity Of Interest for Kansas Visitor Prospects

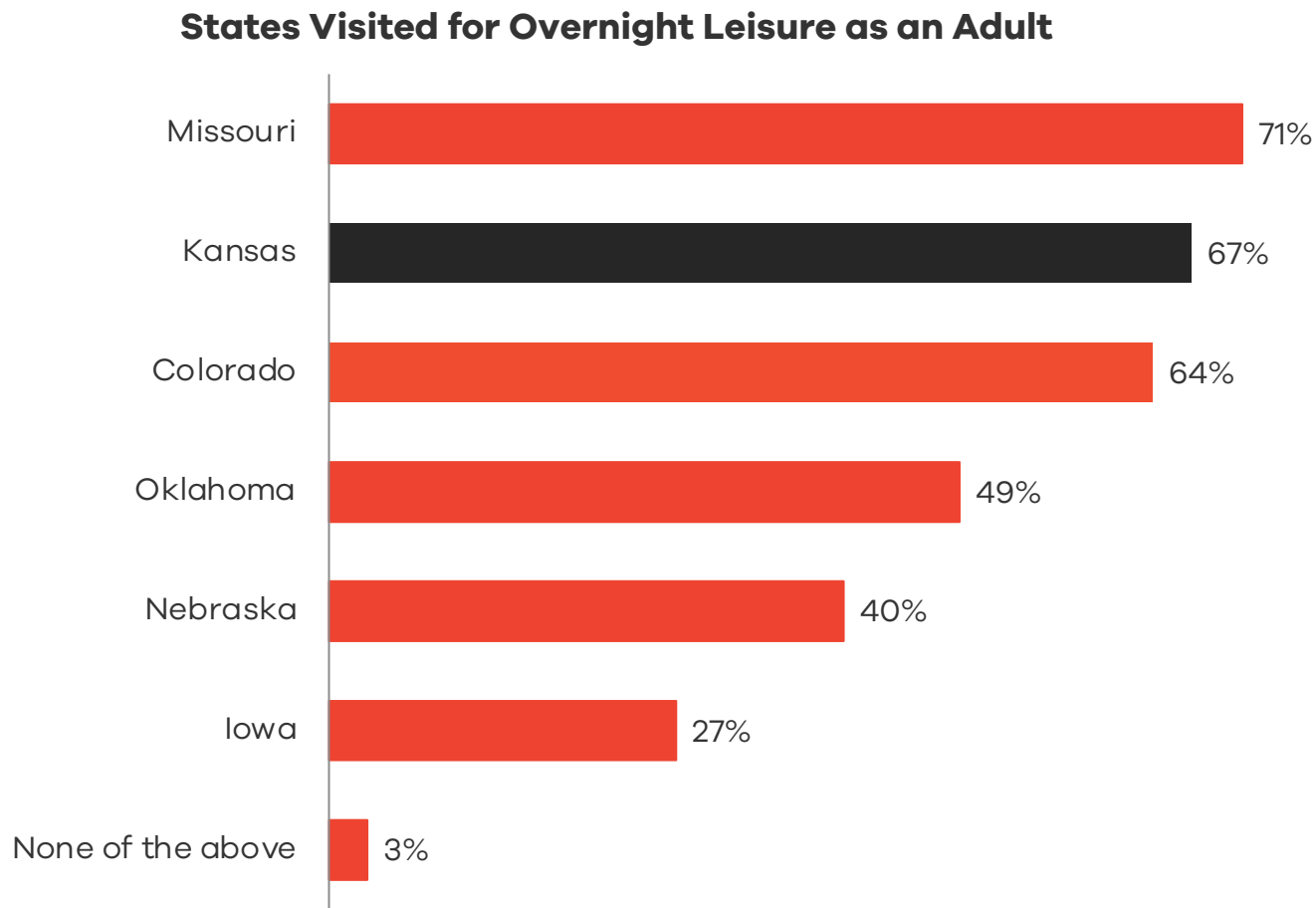


Kansas Residents

The Majority of Resident Respondents (79%) Have Lived in Kansas 10+ Years

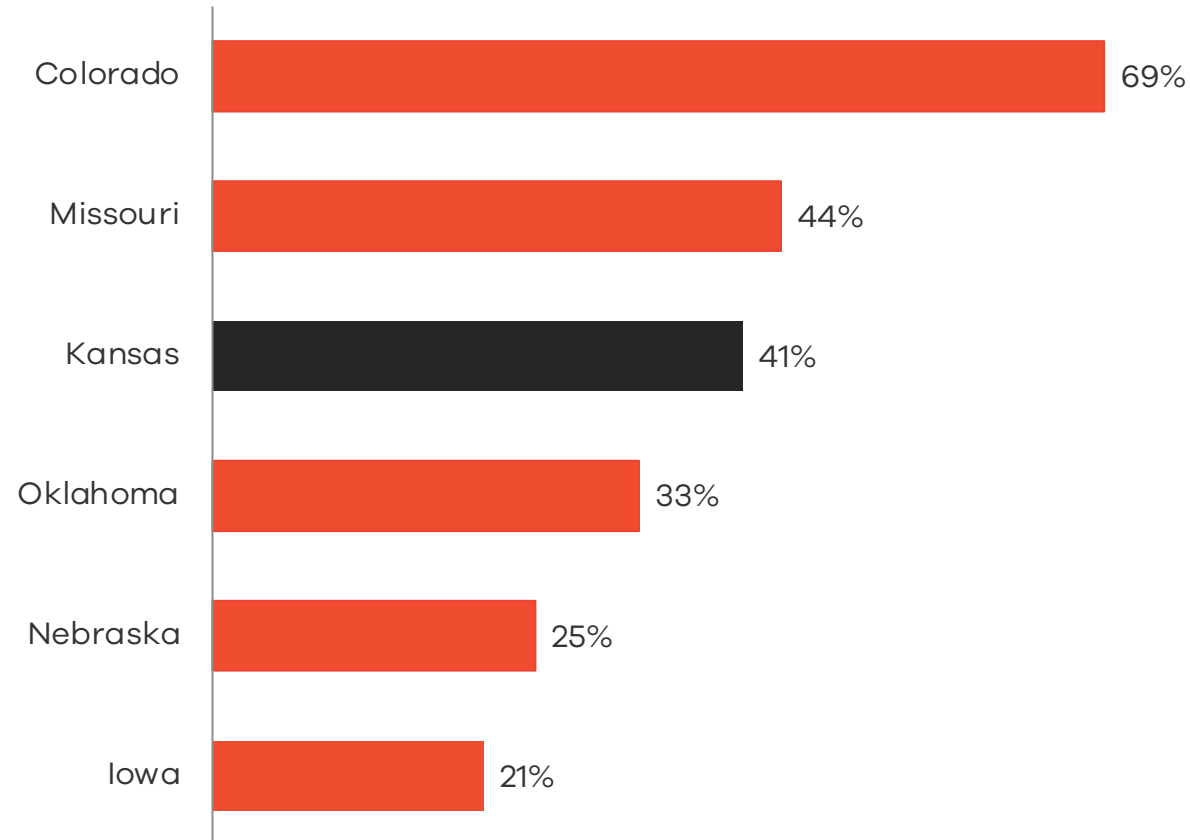


Two-Thirds Of Kansas Residents Have Vacationed Within Kansas



Kansas Residents are Most Interested in Visiting Colorado

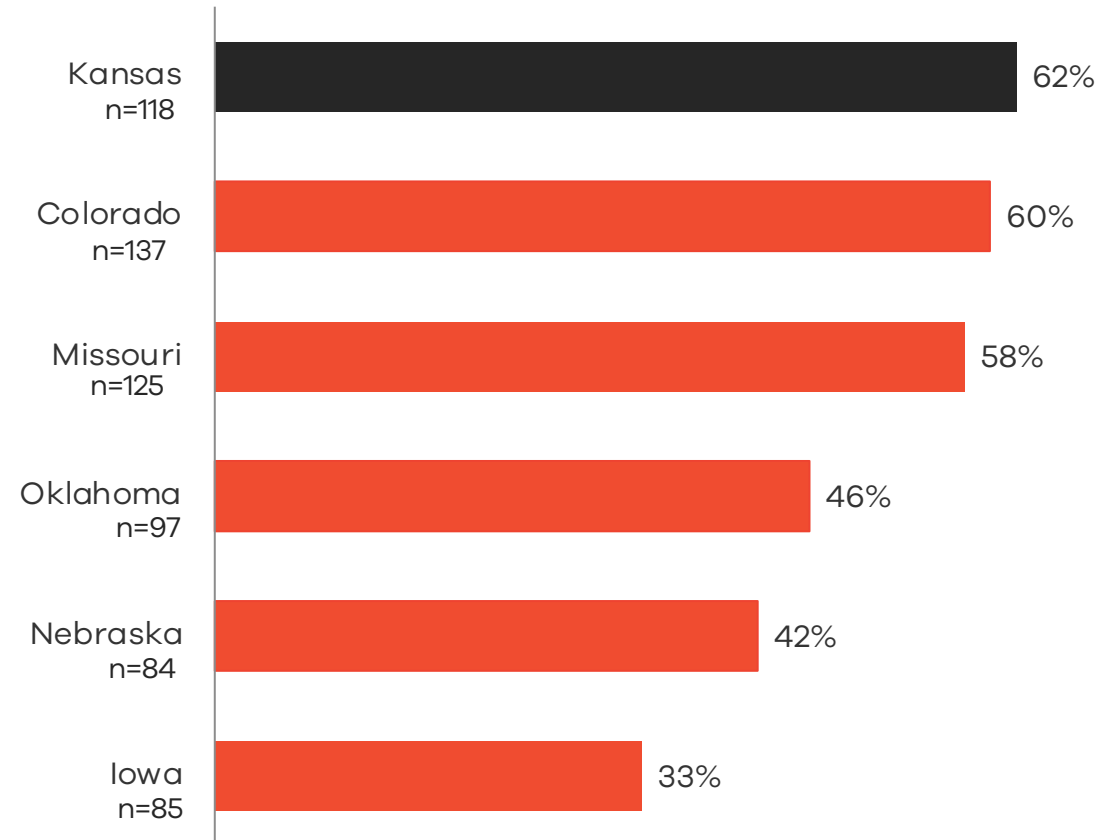
States Interested in Visiting During Next Two Years
% Extremely/Very Interested



Question / Including the state in which you live, please indicate your level of interest in taking an overnight leisure trip to each of the following destinations during the next two years? Base: Residents (n=150)

3 in 5 Residents Indicate A Likelihood To Vacation Within Kansas In The Next Two Years

States Likely to Visit During Next Two Years (Among those Interested)
% Extremely/Likely



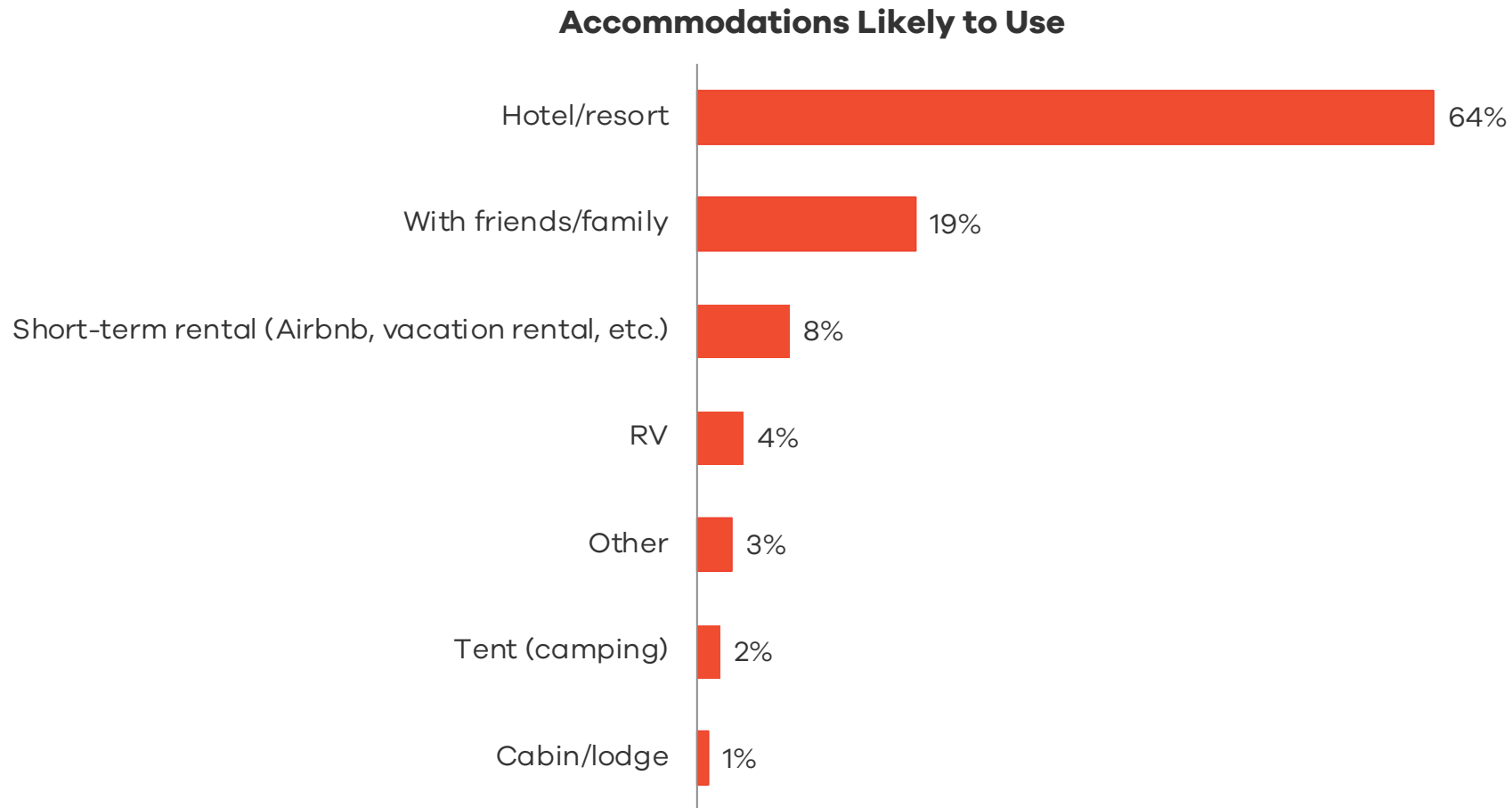
Question / Including the state in which you live, how likely are you to actually take a vacation to each of the following destination(s) for an overnight leisure trip during the next two years?

Base: Residents interested in visiting states

Residents Interested In Visiting Kansas Would Most Likely Visit With Their Significant Other

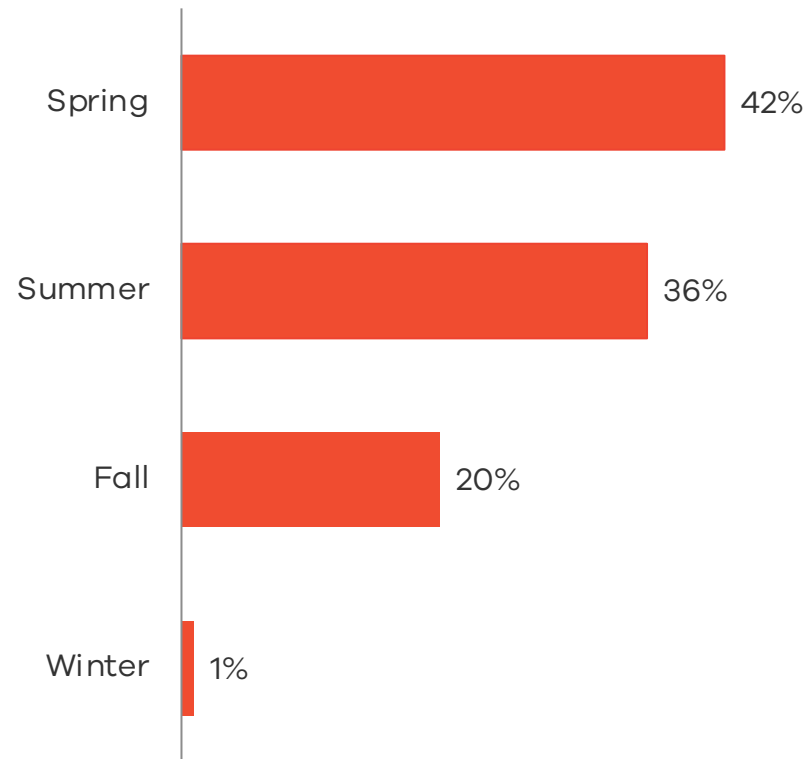


The Majority Would Likely Stay In A Hotel

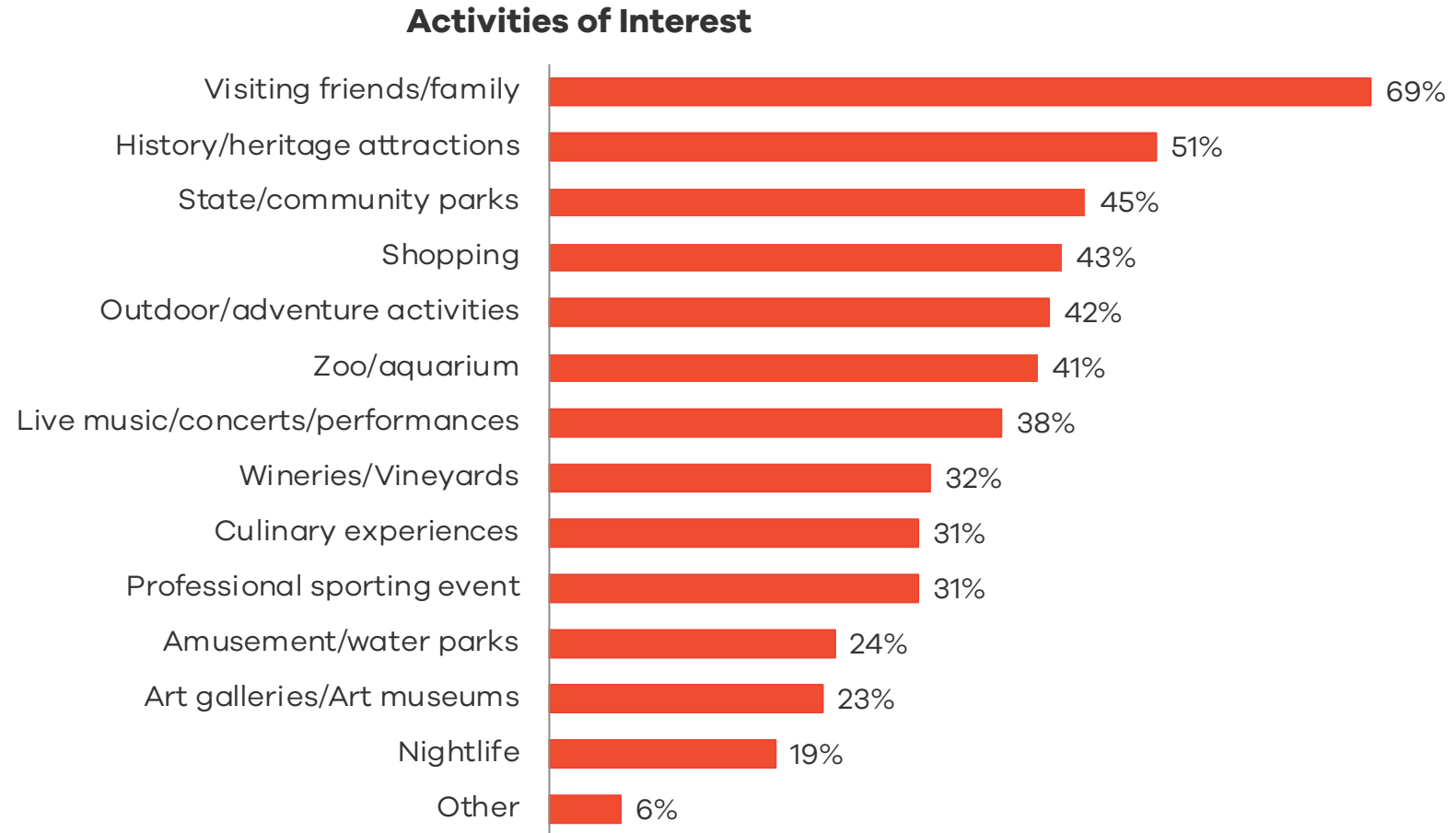


Spring and Summer Are The Most Popular Seasons

Season In Which Would Vacation in Kansas

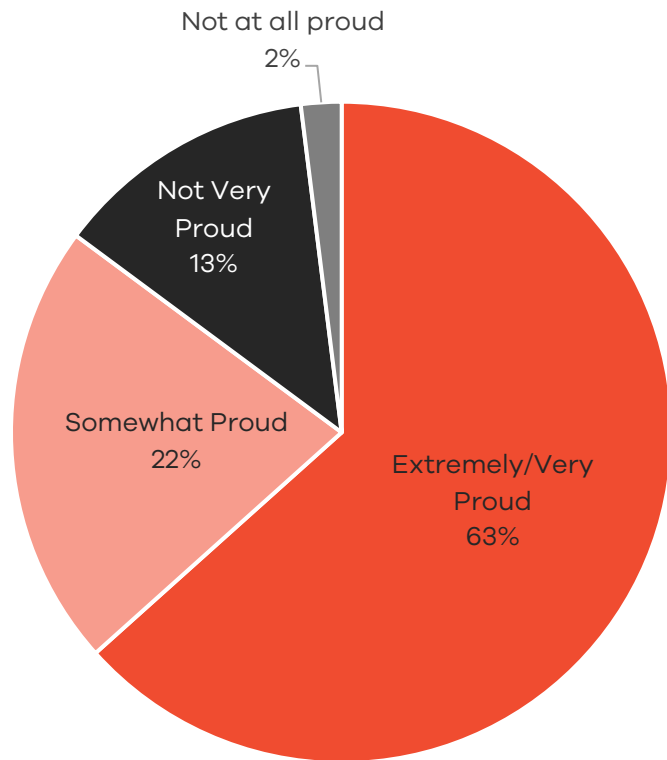


Visiting Friends/Family Is The Top Activity Of Interest



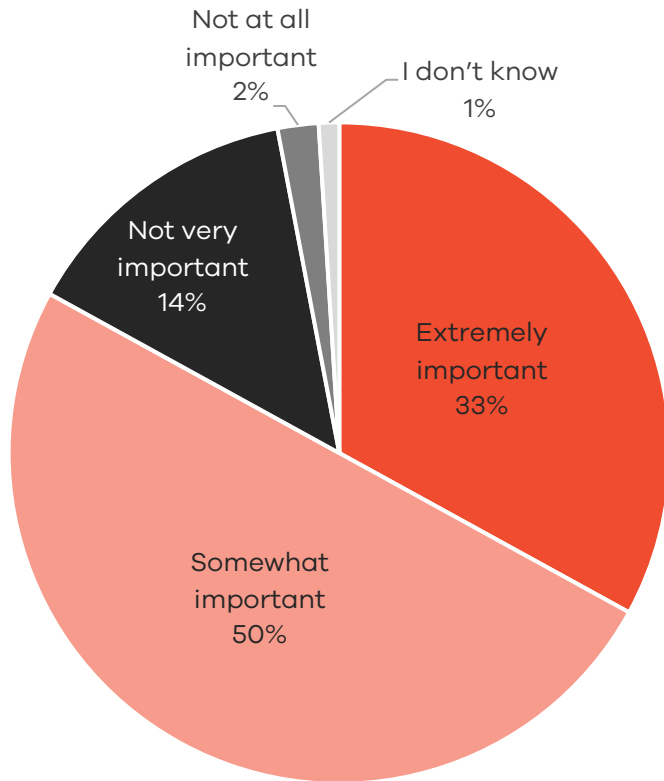
85%

OF RESIDENTS FEEL AT LEAST SOMEWHAT PROUD
TO BE A KANSAS RESIDENT

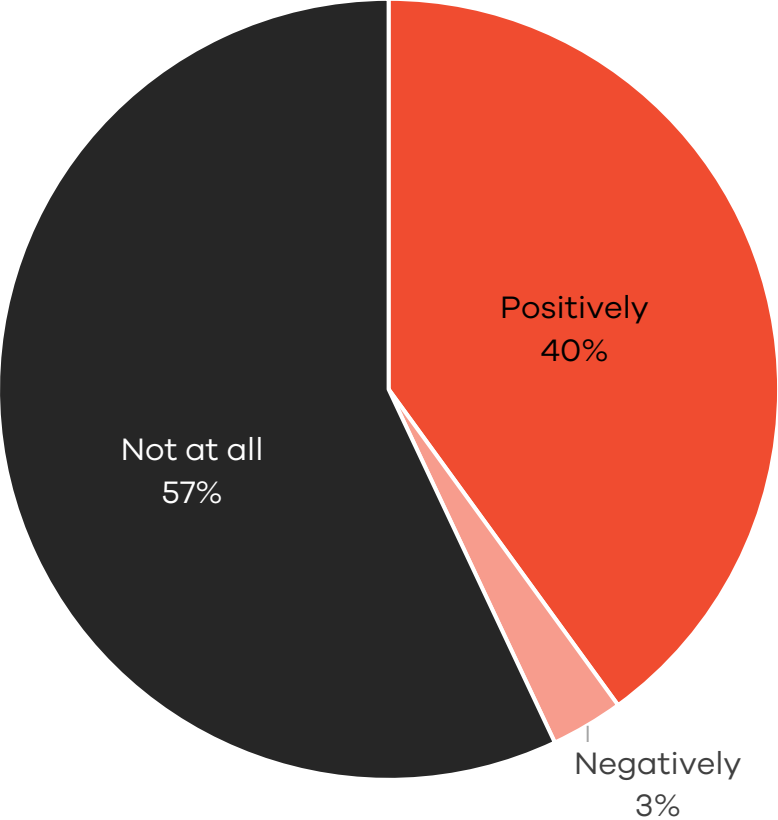


88%

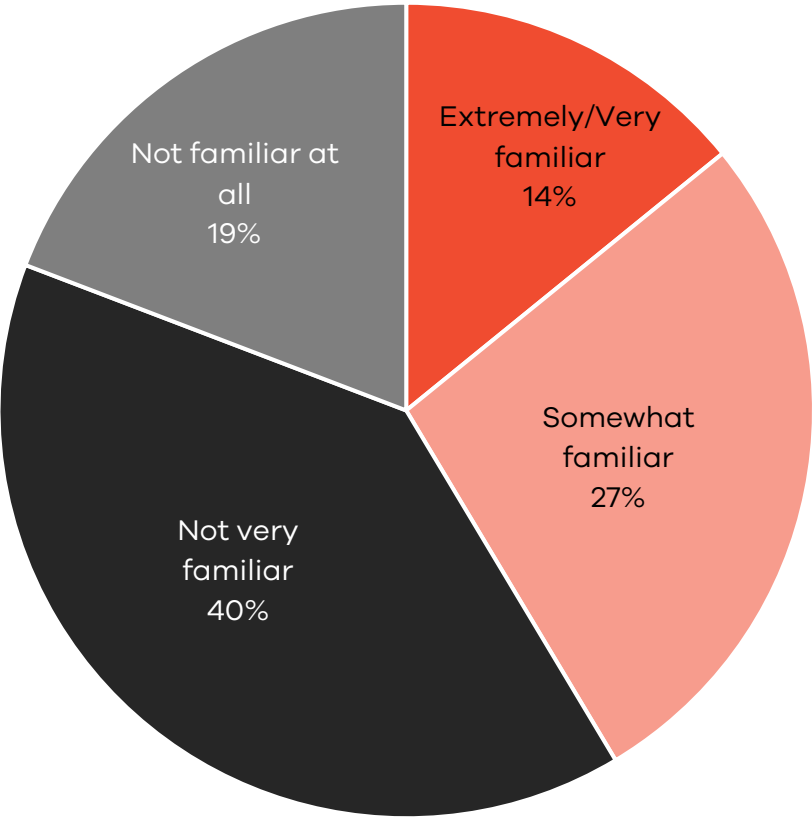
OF RESIDENTS BELIEVE TOURISM IS IMPORTANT TO THE ECONOMIC PROSPERITY OF KANSAS



HOWEVER, LESS THAN HALF BELIEVE THAT IT POSITIVELY IMPACTS THEIR LIFE AS A RESIDENT.



THE MAJORITY OF RESIDENTS, 59%, ARE NOT FAMILIAR WITH THE KANSAS TOURISM OFFICE

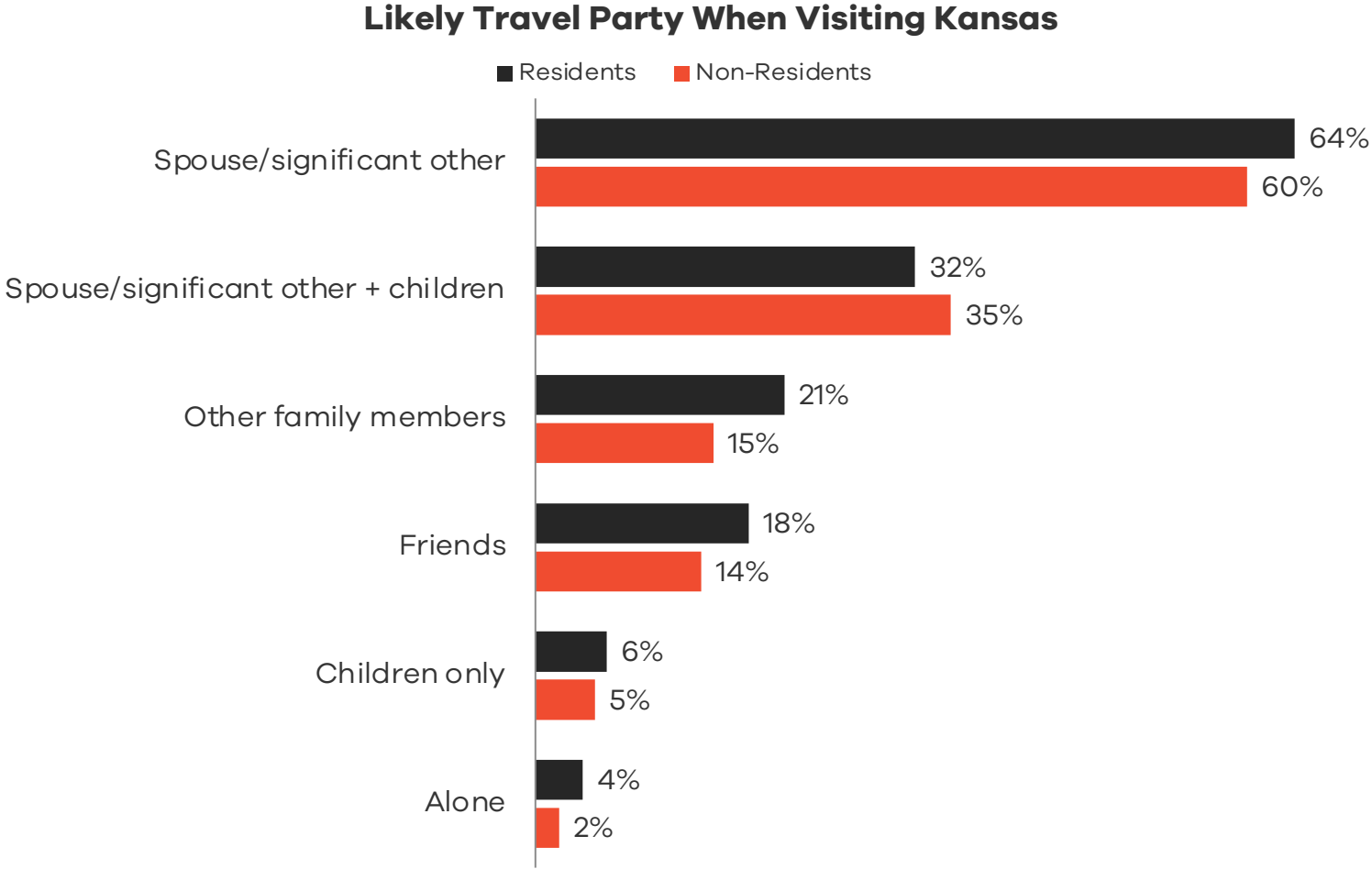


Question / To what extent, if at all, are you familiar with the Kansas Tourism Office, the statewide organization responsible for marketing Kansas as a visitor destination?



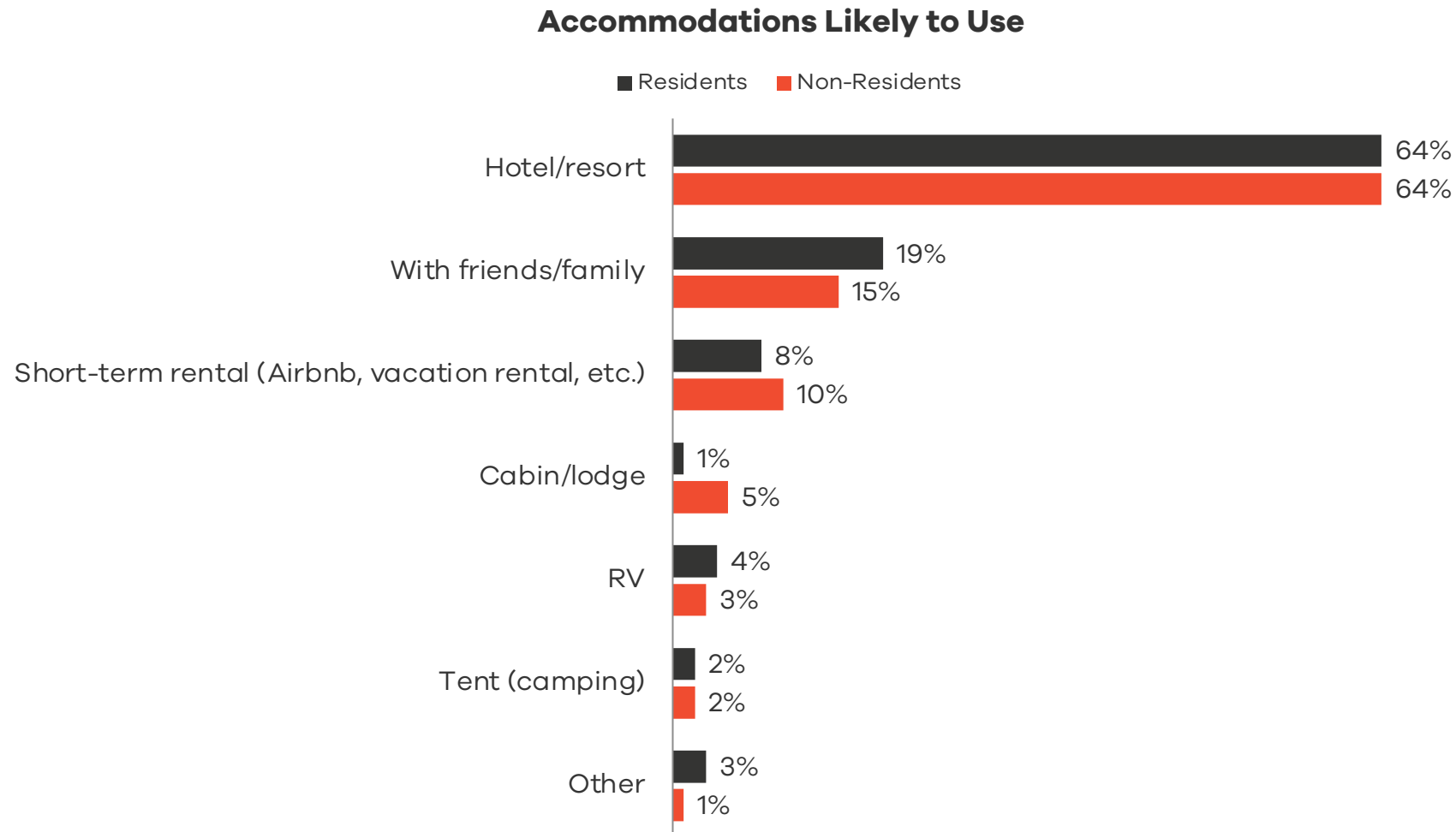
Vacationing in Kansas: Resident/Non-Resident Comparisons

Residents and Non-Residents Would Have Similar Travel Parties While Vacationing in Kansas

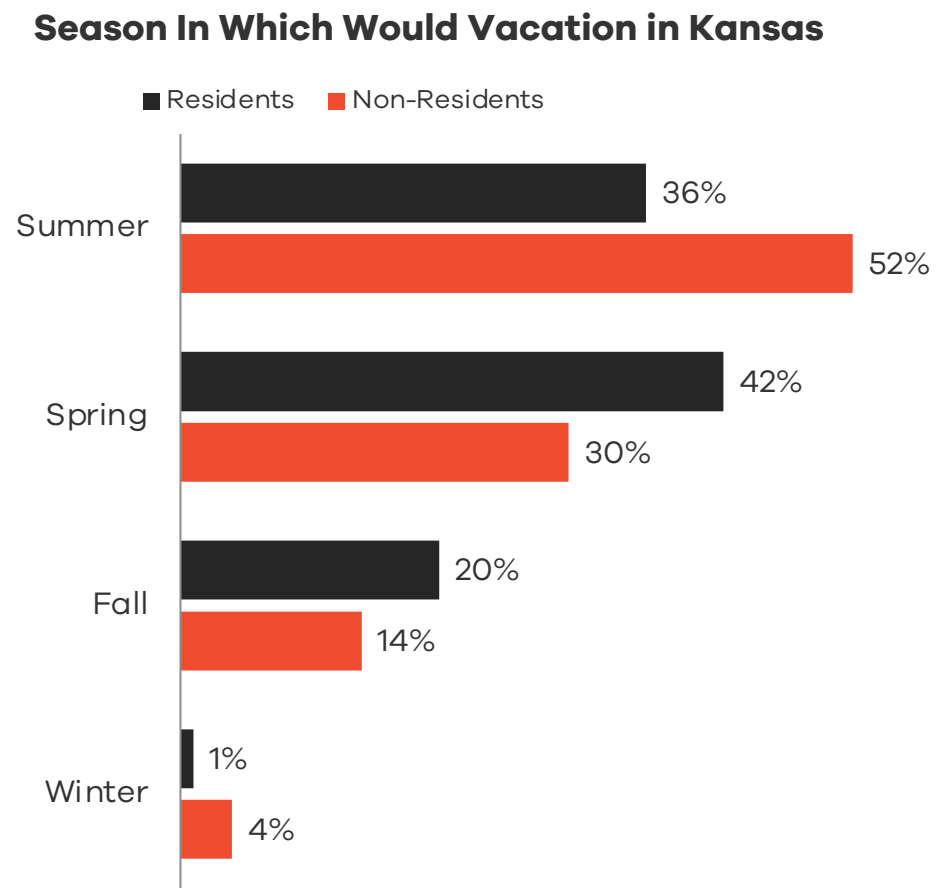


Question / With whom would you be most likely to travel when vacationing in Kansas?
Base: Non-residents interested in visiting Kansas (n=247), Residents interested in vacationing in Kansas (n=118)

Choice of Accommodations Would Also Be Similar

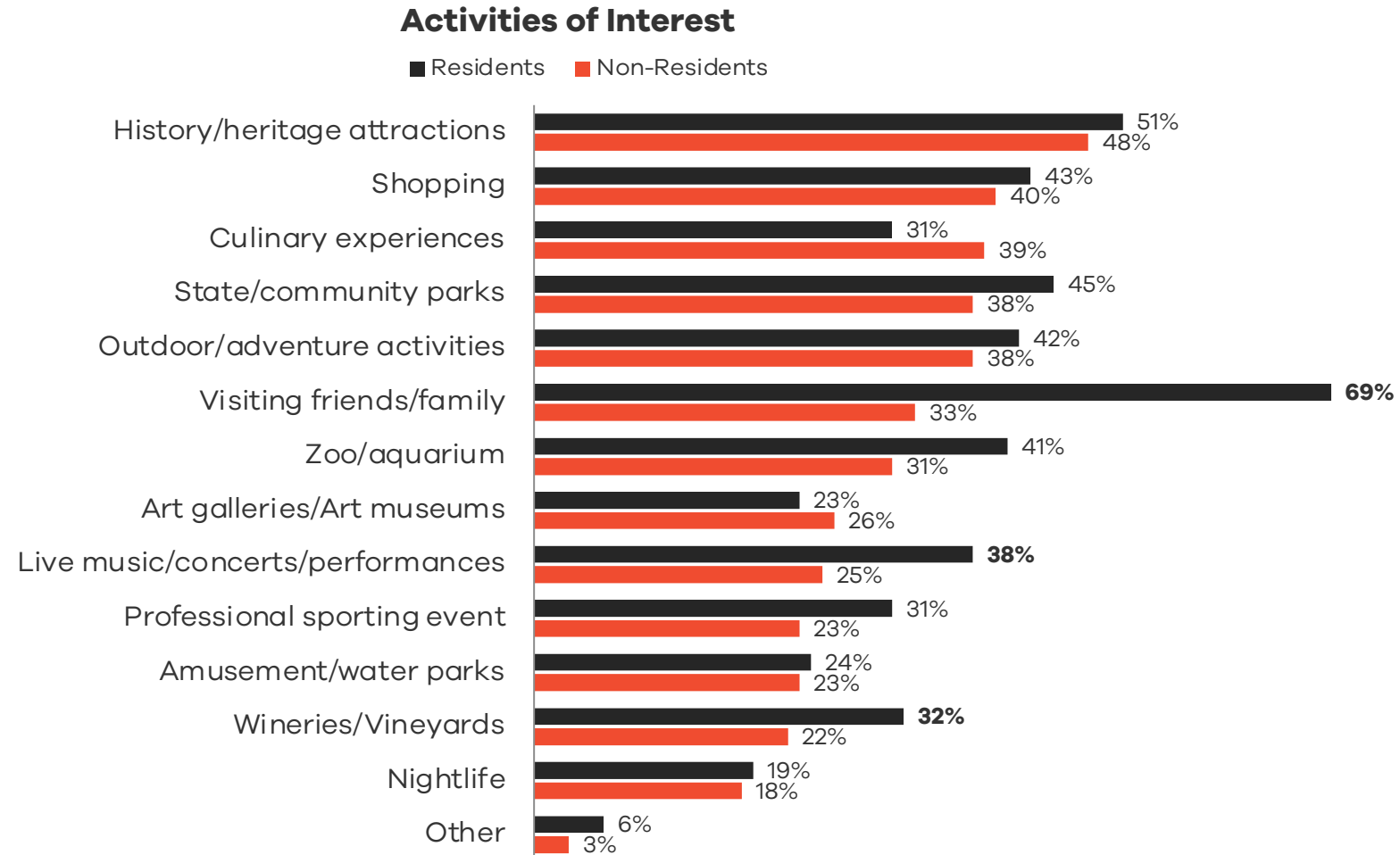


Residents Are More Interested In Vacationing In Kansas In Spring, While Non-residents Are More Interested In Summer



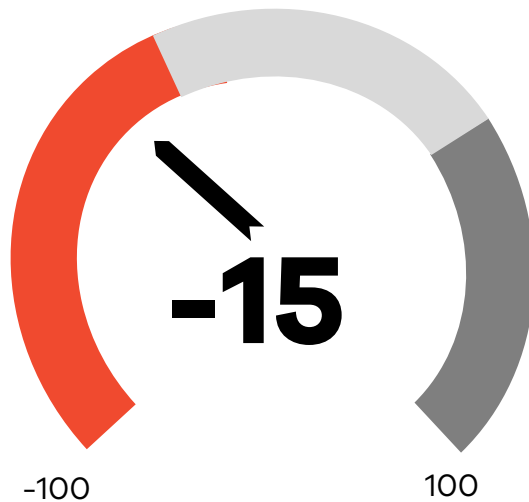
Question / During which season would you be most interested in vacationing in Kansas?
Base: Residents interested in visiting Kansas (n=118), Non-residents interested in visiting Kansas (n=247)

More Residents Than Non-residents Are Interested In Visiting Friends/Family, Experiencing Live Music And Visiting Wineries/Vineyards



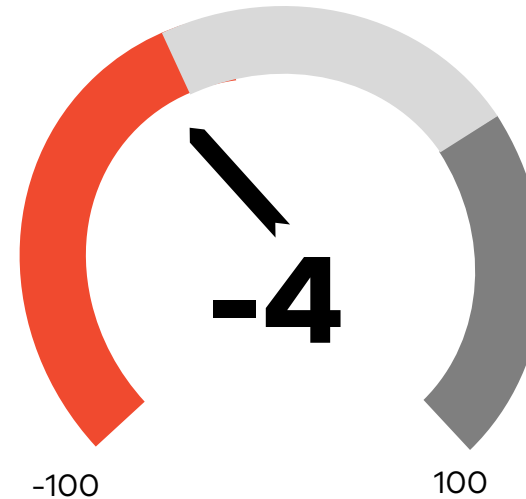
Net Promoter Score:

Non-Residents (Have Visited)



27% Promoters
28% Passives
42% Detractors

Residents



33% Promoters
29% Passives
37% Detractors

Net Promoter Score = Promoters (%) – Detractors (%)

Demographics

Demographics

	Kansas Non-Residents	Kansas Residents
Gender		
Male	46%	41%
Female	54%	59%
Age		
21-39	28%	25%
40-59	40%	40%
60+	32%	30%
Income		
\$50,000–\$74,999	33%	27%
\$75,000–\$99,999	22%	25%
\$100,000–\$124,999	13%	15%
\$125,000–\$149,999	11%	16%
\$150,000 or more	21%	17%

	Kansas Non-Residents	Kansas Residents
Have children under 18 living at home	33%	33%
Marital Status		
Married	28%	25%
Divorced/Separated/ Widowed	10%	7%
Unmarried couple living together	7%	5%
Never Married	9%	9%
Ethnicity		
White	94%	94%
Native American	2%	3%
Asian	3%	3%
African American/Black	1%	2%
Other	2%	1%



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