



eXplore Lawrence Board Meeting Agenda

Wednesday 1/31/24

11 A.M Carnegie Building Conference Room

1. Approval of Minutes
2. Financials
3. Staff Reports : 2024 Marketing Plan Presentation
4. Executive Director Report
 - PlacerAI presentation + proposal
 - Staffing Update
 - Staff Retreat
 - Tourism Economics 2022 Economic Impact Report



Governing Board Retreat Meeting Minutes

Wednesday, December 6, 2023

11:00 am–3:30 pm

10th and Mass - LAC

Attendees: Mike Logan, Ivan Simac, Anthea Scouffas, Drew Gaschler, Tina Tourtillott, Porter Arneil, Kathy Gerstner, Kim Anspach (staff) Jonathan Morris (facilitator)

1. Welcome and Introductions

- Executive Director Welcome
- Plans for the Day
- Facilitator introduction

2. Board Members and Ex-Officio Members

- *Why do you serve eXplore Lawrence? What do you do for work?*
- *What do you look forward to in 2024?*
 - i. Mike: Transient and Tourism Economy. Highlighting our hospitality industry as the second largest employer. New energized staff at EL.
 - ii. Ivan: World Peace and Prosperity. Continuing the success. New things on the horizon. Personal and business growth.
 - iii. Kathy: On the cusp of a lot of exciting things and growth. Infrastructure and development. Momentum is with us. On the threshold of an amazing decade
 - iv. Tina: Finishing her MBA. For Lawrence looking forward to what's to come.
 - v. Porter: Changes in Parks and rec and integration of Arts and Culture alignment with City Strategic Plan
 - vi. Anthea: Excited to see where the team goes. The team is energized and excited. Working through challenges and new structures with KU hospitality. New leadership at Haskell. Continuing to work forward with DIB. New energy from young Diverse leaders
 - vii. Kim: Harness the energy and talents of staff and keep our mission focused.

Fully staffed is a huge accomplishment in 2023.

This staff is fully hired by Kim.

EL is in a good place. Budget is looking good. Deploying funds well

Improvements for 2024:

More intentional way to mark strategic plan progress

More intentional acknowledgement of completion

Ensuring we are staying on path and making progress.

Board Meeting Consistency and meeting quorum effectively

3. Strategic Planning

- Progress on the 2022-2027 Strategic Plan implementation
 - *What were the most significant successes or accomplishments in 2023?*
 - Status updates –
 - Discussed Highlights from 2023.
 - Sales: Discussed strategies and deploying sales staff to specific areas and focused on specific Strategic Goals.
 - 1.4 Is our current incentive program meeting our goals? How do we measure that and what improvements should we discuss for 2024?
Leveraging our lost business, be sure to add this into our sales strategic.
 - What is the bigger sales picture, and what large scale events can we recruit to Lawrence?
 - Marketing: Discussed progress and strategies
 - 2.3 Who is the bleisure traveler and how can we personalize information with meeting/sales groups to extend the stay?
 - Community Partnerships
 - Discussed EL's role in representing the Lawrence Business Community specifically in regards to 3.1.
 - Organizational Health
 - Discussed the stall on our governance and funding proposal. Porter suggested we work directly with Brandon.
 - Formal check in on Strategic Goal.
 - One time per quarter we will schedule a Board Meeting that focuses specifically on EL strategic Plan. We will pick one or two of our goals to focus on. We will discuss where we need support and where we are exceeding.
 - Quarterly Strategic check in meetings will be in
 - March, June, September and December (retreat)

- Public facing celebration of the board and the progress.
 - We need to be better at telling our story. Take a moment and do this before checking it off and moving onto the next objective.
 - Deploy our “about us” page as a resource for communicating the important work to the public, the City and Elected Official.
- Progress relative to City of Lawrence’s Strategic Plan
 - Alignment, priorities, and challenges
- Work Environment: Visitor Center and Office Space
 - Creation of Sub Committee to explore workspace environments
 - Mike, Drew & Kim
 - Current state, challenges, and future considerations
 - Need to understand the budget for future years
 - What are some ways to mitigate the current work environment?
- Strategic Opportunities
 - FIFA World Cup 2026
 - How do we institutionalize these strategies
 - KU and Gateway Project
 - We are being asked for input.
 - How does the project interact with the rest of the community?
 - Is sales tax and Transient Guest Tax applicable on the site?
 - Our role will be to share what is and get people to come here to experience.
 - What does a successful collaboration look like on this?
 - Board and Organizational Development
 - Other priorities

4. Next Steps

- Implementation Plans and Marking Progress
- Next Board Meeting
 - Board Meeting Last Wednesday of the Month 11-12 for 2024



2024 Marketing & Communications Plan

Executive Summary

eXplore Lawrence is responsible for increasing the tourism economy in Lawrence by attracting visitors and events to the city. This Marketing & Communications Plan outlines the current situation for tourism in Lawrence and tourism trends throughout the nation, and the marketing and communications strategies and tactics that will help the department fulfill its mission.

It's an exciting time for tourism in Lawrence as the desire to travel is stronger than ever. Lawrence has experiences travelers want: arts, culture, history, college sports, outdoor adventure, family activities, live music, and incredible food. This plan includes a look at the current situation in Lawrence and traveler trends that have helped inform this plan.

Multiple data sources, including website analytics, Lawrence traveler information, and national traveler demographics, informed the creation of this year's Target Markets and Traveler Personas. We will focus on our best-performing Day Tripper and Road Tripper audiences from 2023 and continue our advertising in our target markets set forth in our strategic plan.

All of this information helped inform the Strategies and Tactics laid out in this plan. In addition to furthering the recognition of the Unmistakably Lawrence brand, this plan includes tactics that will increase travel to and throughout Lawrence and Douglas County through the Lawrence Passports program, tactics to help improve our community engagement, champion diversity, equity, and inclusion, and support the Sales Department in growing meetings and group events.

Finally, this plan includes the Key Performance Indicators we will use to measure this plan's success.

Marketing & Communications Mission

eXplore Lawrence builds the tourism economy in Lawrence by increasing the number and diversity of visitors through innovative, creative, and welcoming marketing and communications strategies.

Situation

Sunday - Thursday

Business and Conference travel has had a slower recovery than leisure travel. Because of this, our highest need time continues to be Sunday through Thursday business. We have the opportunity to continue increasing TGT collections by focusing our efforts on summer weekday leisure travel and supporting the Sales Department with marketing Lawrence as a convenient, affordable, and unmistakable meeting and event destination.



The Winning Effect

A winning Jayhawk Basketball Team, a winning Jayhawk Football team, and an increase of success for nearly all of the Jayhawk's collegiate sports teams have resulted in a heightened interest in Lawrence as a destination for college sports fans. In addition to the Jayhawk's success, Sporting KC's #2 team is continuing to play their home season at Rock Chalk Park, connecting Lawrence to professional soccer just in time for the World Cup's presence in Kansas City.

Itching for Arts, Culture, and Music

In 2023, we saw festivals, live music, and historical and cultural events earn some of the highest search traffic on our website. Final Fridays art walk continues to grow. Live music calendars are packed with a diversity of local and touring acts. Lawrence also continues to host our key events, such as Busker Fest, the Old Fashioned Christmas Parade, and Pride.



2023 Marketing Results

Website

338,394 users
332,276 new users
4,387,237 events
12.97 events/user

Social Media

33,494 fans/followers
4,889 new fans/followers
3.3 million impressions
347,708 engagements

Digital Advertising

13.4 million impressions
181,938 clicks

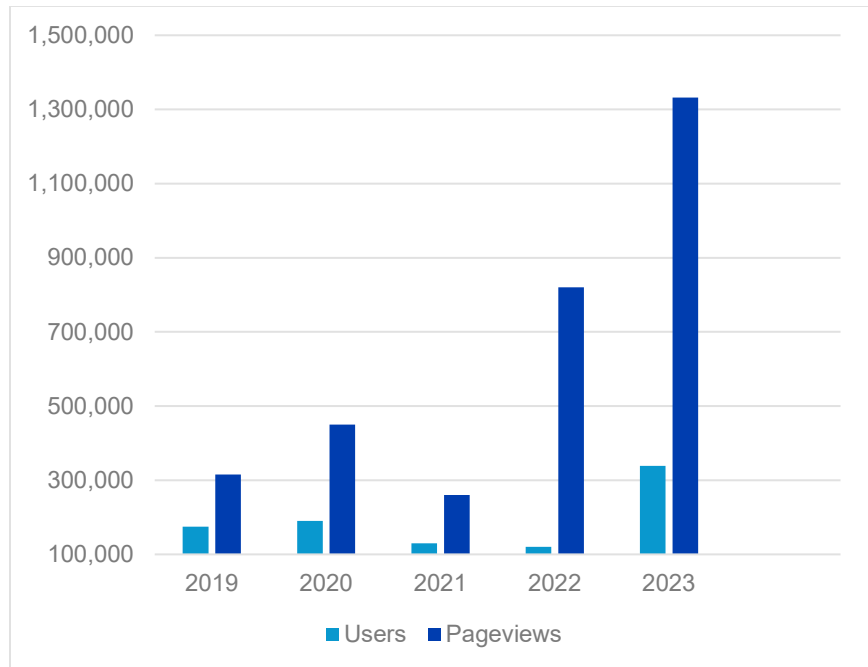
E-Newsletter

11 emails sent
21,972 opens
2,090 clicks

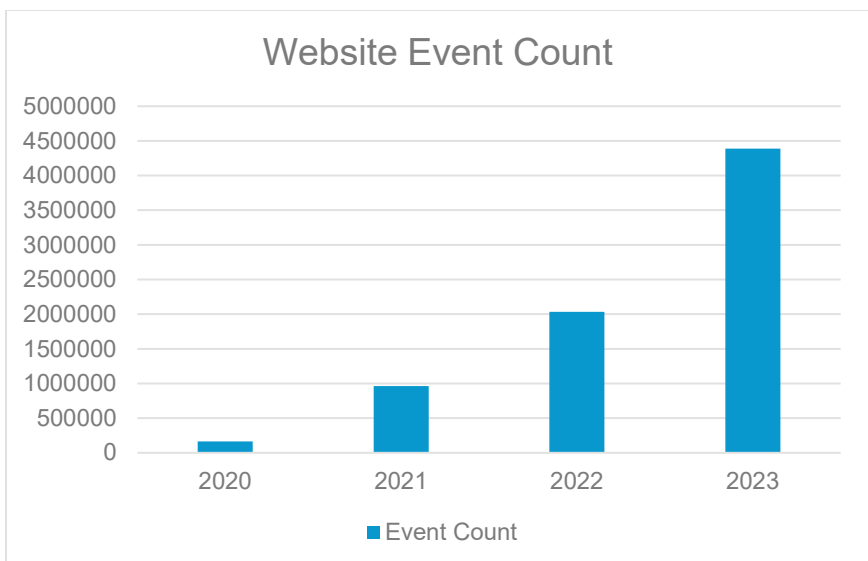
Lawrence

Passports
2,826 pass sign-ups
2,474 check-ins

Website Traffic



Website Event Count





Travel Trends

Budget Matters. The cost of living is up, so budgets are tight. Travel is still a priority, but travelers seek budget-friendly road trip destinations. They may travel to destinations where they can stay with friends or relatives or add vacations to the front or back end of business and sports trips.

Work from Anywhere. The continuation of fully-remote jobs has increased “digital nomads.” Often these folks stay for weeks in short-term rentals and immerse themselves in the communities they travel to.

Sustainable Practices. Travelers care about traveling responsibly and show loyalty to brands and destinations that do their part to put sustainable, environmentally-friendly practices in place.

It’s all about Experience. Experiences reign supreme when it comes to travel. Tours and activities are making a steady comeback after the pandemic.

Family and Multi-Generational Travel. Families are savoring being back together and connecting in person, whether at home or on the road.

Cheers to Craft Beverages and Cocktail Culture. The craft beverage scene and cocktail culture are continuing to gain popularity nationwide. There’s an emergence of zero-proof cocktail bars and restaurants offering zero-proof drinks to make an inclusive environment for those who like the culture but don’t drink alcohol.

More Digital and even more Mobile. The entire travel funnel, from travel inspiration, planning, and booking, to in-destination experience, continues to move more mobile year after year.

Target Markets & Traveler Personas

MARKETS

Locals

- Lawrence/Douglas County

Daytrippers

- Kansas City DMA
- Topeka DMA, excluding Douglas County

Roadtrippers

- Wichita/Hutchinson DMA
- Denver DMA
- Chicago DMA
- Dallas DMA

Emerging Roadtripper Audiences

- Nashville
- Omaha
- Springfield
- St. Louis



TRAVELER PERSONAS

College Sports Fanatic

Live Music Lover

Arts, Culture, & History Traveler

Foodie

Family Vacationer

Outdoor Adventurer

Groups Target Markets

Meeting & Conference Planners

- Association
- Corporate
- Education

Sports Event Planners

- Youth/Amateur Sports
- Outdoor Sports
- College Sports

Group Event Planners

- Weddings
- Reunions
- Group Tours

Community Engagement Target Markets

- Community Members
- Local Hospitality Industry
- Government Officials

Strategies & Tactics

Strengthen Brand Awareness among target markets

Destination Branding, aka Place Branding, is all about who we are. It's our unique identity, our promise to travelers, and it differentiates us from the competition. It encompasses our values, history, reputation, and identity.

The Destination Brand: Unmistakably Lawrence

Lawrence celebrates everyone's uniqueness – come here to explore and enjoy our unique spirit and elevate your own.



Brand Personality

Lawrence is your quirky, cool friend who brings fun to the neighborhood. Lawrence works hard and plays hard. Lawrence is both outgoing and welcoming, creating an atmosphere of acceptance and innovation. Its eclectic personality is reminiscent of the proverbial “Renaissance Man,” whose expertise spans a broad range of areas: Education, Arts & Culture, Sports & Social Accomplishments. Lawrence is a catalyst for organic creation and original thought, a lightning rod for cultural change. Its energy is contagious. Like a great film, it leaves you wanting more.

Brand Values

Local

We appreciate the craftsmanship and care put into every plate of food, artisan beer, or piece of art. Raise a glass of Free State Wheat while you enjoy viewing the cast of local characters that make Lawrence unique.

Proud

We have a long history of tradition and excellence – all grown out of the spirit and independence that began from the turmoil of the Civil War. Whether sports, arts, food, music, academics, or business, we continually strive to be the best.

Friendly

Bring us your tired, your hungry, your huddled masses yearning to be entertained and in need of a break from the routine. You are guaranteed an escape from the ordinary.

TACTICS

1. Incorporate the Unmistakably Lawrence brand through all leisure marketing and communication channels.
2. Establish the brand in the community through the use of local signage
3. Produce more content (blogs, videos, photos, social media, etc.) to tell the Unmistakably Lawrence story and highlight key assets and personas.
4. Increase efforts to pitch stories that reinforce the Unmistakably Lawrence brand.
5. Identify and solicit key influencers and media for hosted visits.
6. Increase local and visitor website and social interaction by implementing Crowdrift technology.

Inspire and Increase Traveler and Visitor Spending

Capture the attention of potential travelers and provide inspiration and resources for them to stay longer, spend more, and share with their networks, focusing on our highest need times (Sunday-Thursday business).

TACTICS

1. Market “Lawrence Passports” that provide guests with offers and incentives to visit businesses and attractions throughout the city and county.
2. Develop digital advertising campaigns specific to personas
3. Work with Sales Department and Local Accommodations to turn business travelers into “bleisure” travelers.
4. Personalize content for website visitors by implementing Dynamic Content.
5. Collaborate with regional organizations to market Lawrence with the respective organizations.



6. Equip Visitors Center staff with the resources and expertise to provide accurate information and recommendations to visitors
7. Deploy monthly e-newsletter to our leisure database
8. Build relationships with media outlets and partners to earn media coverage on events, passports, and more.

Champion Diversity, Equity, and Inclusion

Establish and promote Lawrence as a safe and welcoming destination that celebrates and embraces people of every race, ethnicity, identity, sexual orientation, religion, age, social status, and background.

TACTICS

1. Identify, support, and promote events and businesses celebrating different cultures and underserved communities
2. Identify media/marketing opportunities to reach LGBTQ audiences
3. Implement accessibility features on explorelawrence.com to make the site user-friendly for people with differing abilities
4. Explore DEI training for staff and hospitality partners

Improve Community Engagement

Achieve local understanding and support for tourism as an economic engine.

TACTICS

1. Organize community engagement events and meetings to leverage resources and foster a community of collaboration
2. Build an army of Unmistakably Lawrence Brand Ambassadors through the Tourism Ambassador program.
3. Be the go-to resource for the local tourism/hospitality industry and event planners for tourism-related marketing best practices and event planning in Lawrence
4. Organize leadership participation in local media opportunities
5. Intentional staff and leadership presence at key attractions and events throughout the year
6. Monthly industry e-news and timely conference/event alerts to partners

Expand Meetings and Groups

Provide marketing and communications support to help the Sales Department meet and exceed its sales goals.

TACTICS

1. Research, suggest and deploy strategies to increase awareness of Lawrence as a group/meeting destination among key markets.
2. Maintain a Marketing Toolkit for event planners' use
3. Create Sales Collateral to support the Sales team

Performance Measures

Organizational Objectives

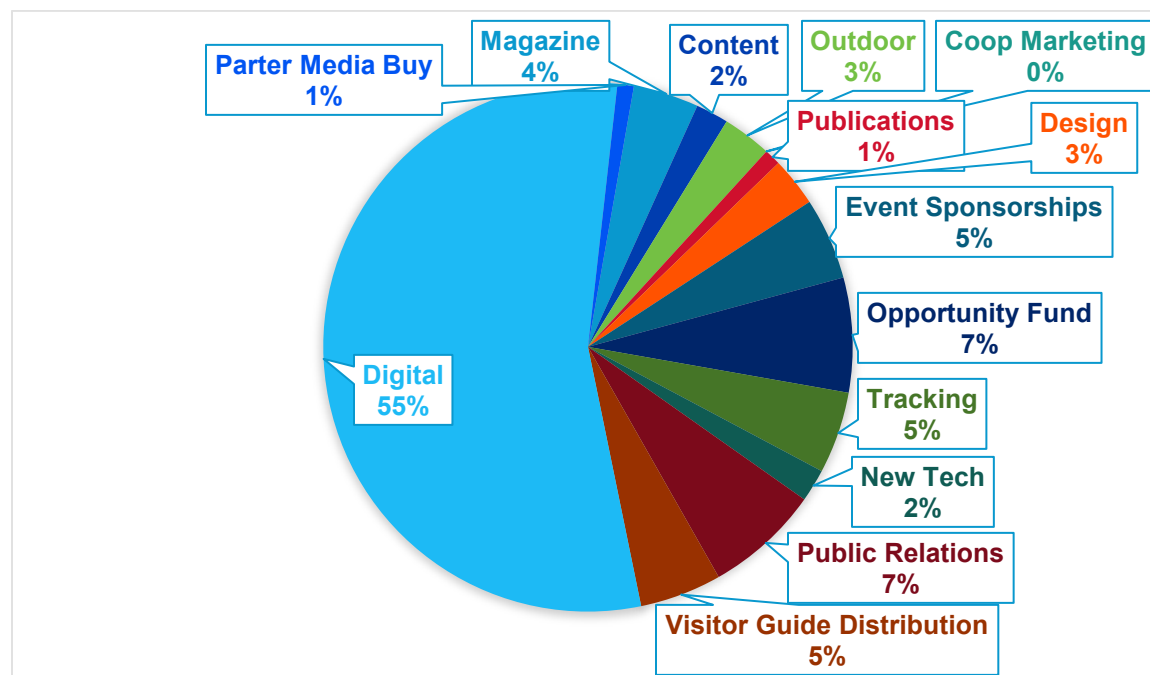
- Grow visitor spending by 5% compared to 2023.
- Grow direct jobs supported by Douglas County visitor activity by 5% compared to 2023.

Marketing & Communications Objectives

- **Increase Social Engagement by 5%**
- Increase Social Follower Count to 35,100
- Generate 3,500 Lawrence Passport Sign-ups and 3,500 check-ins
- Acquire 262,000 website users
- Distribute 50,000+ Visitors Guides
- Deploy 12 leisure e-newsletters, generating 3,200 clicks
- Host 6 Travel Writers/Influencers generating 6+ news stories and blog
- Send 12 Lawrence Tourism Industry e-newsletters

Budget

Leisure Marketing Budget by Medium



Approved 2024 Budget

7601 · Advertising

7601.10 · Magazine	\$	22,000.00
7601.12 · Content	\$	15,000.00
7601.14 · Outdoor	\$	25,000.00
7601.15 Coop Marketing Expenses	\$	10,000.00
7601.19 Publications	\$	5,000.00
7601.2 · Design	\$	12,000.00
TBD: Event Sponsorships: New line	\$	22,000.00
7601.21 · Opportunity Fund	\$	30,100.00
7601.22 Tracking	\$	20,000.00
7601.24 · New Technology	\$	10,000.00
7601.4 · Public Relations	\$	26,000.00
7601.6 · I-70 Distribution	\$	19,000.00
7601.8 · Digital	\$	223,000.00
7601.9 · Partner Media Buy Program	\$	8,000.00

\$ 447,100.00

Proposed 2024 Budget

7601 · Advertising

7601.10 · Magazine	\$	17,670.00
7601.12 · Content	\$	10,000.00
7601.14 · Outdoor	\$	15,000.00
7601.15 Coop Marketing Expenses	\$	-
7601.19 Publications	\$	5,000.00
7601.2 · Design	\$	13,910.00
TBD: Event Sponsorships: New line	\$	22,000.00
7601.21 · Opportunity Fund	\$	30,000.00
7601.22 Tracking	\$	20,000.00
7601.24 · New Technology	\$	10,000.00
7601.4 · Public Relations	\$	30,500.00
7601.6 · Visitor Guide Distribution	\$	24,200.00
7601.8 · Digital	\$	244,820.00
7601.9 · Partner Media Buy Program	\$	4,000.00

\$ 447,100.00



DECEMBER MARKETING REPORT

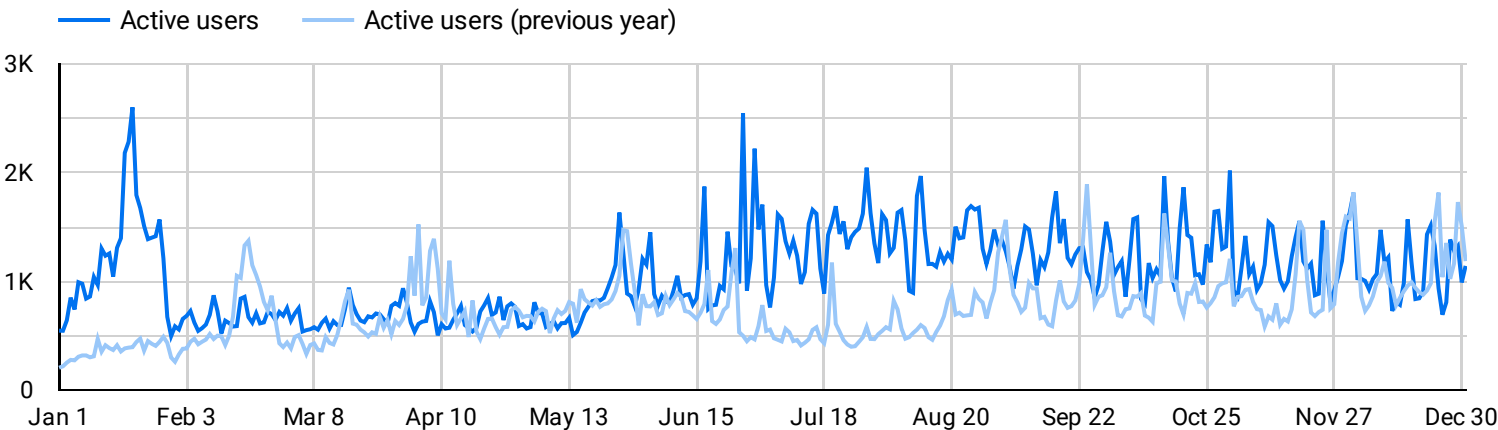
DECEMBER MARKETING SUMMARY

Our December marketing campaigns focused on the Winter Wonder Pass, live music, holiday events, pop-up announcements, events, and launching the Lawrence Restaurant Week campaign. The Winter Wonder Pass has had great success, with almost 1,200 sign-ups. Our social media focused on promoting winter events, including holiday pop-ups and New Year's Eve celebrations, live music, 5 days of giveaways, and our new 2024 Visitors Guide.

EXPLORELAWRENCE.COM

Total website users for December were 33,178, up 0.3% from last year. Over 30,000 of the users in December this year were first-time visitors to the site. Each user averaged almost 11 "events" on the site (up 56.3% from last year), including page views, scrolls, link clicks, video views, etc. Page views were slight less than last year, totally 93,757. The most viewed content in December was the Events Calendar, Kaw Valley Craft Pass, Home Page, Winter Wonder Pass, Restaurants, and more.

Total users	New users	Event count	Event count per user	Views
33,178	30,589	359,809	11.05	93,757
↑ 0.3%	↓ -2.4%	↑ 55.8%	↑ 56.3%	↓ -1.5%



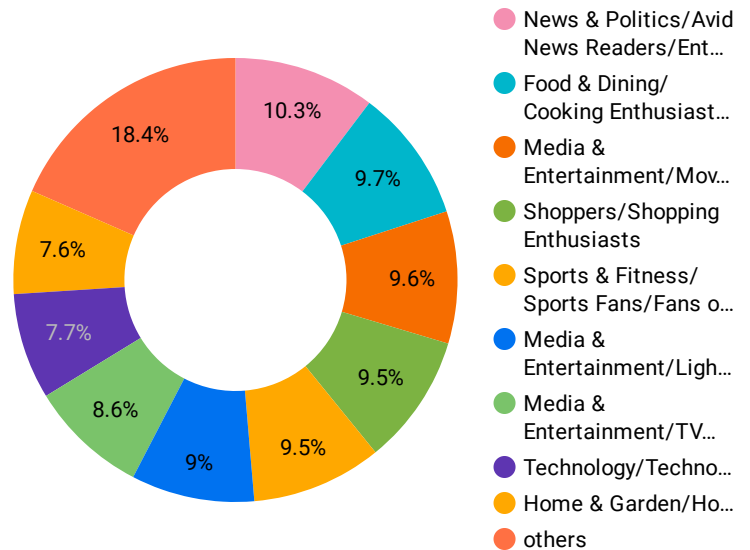
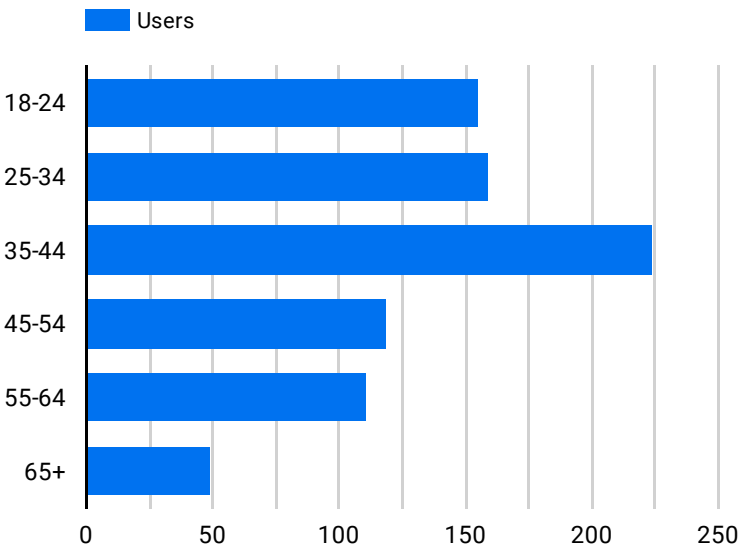
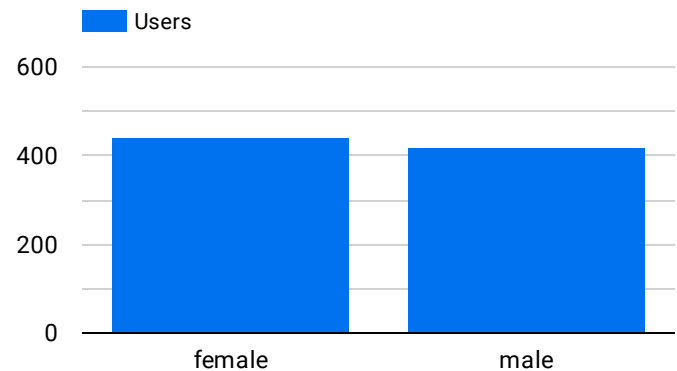
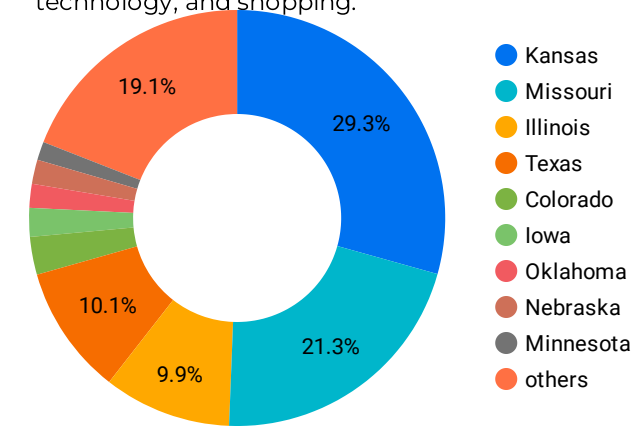
Event name ▾	Event count	% Δ
widget_interaction	22	-
view_search_results	169	8.3% ↑
view_item	100	-
video_start	61	22.0% ↑
video_progress	118	-20.3%...
video_complete	12	-52.0%...
vg_request	52	-
user_engagement	27,171	-32.0%...
session_start	41,550	-1.5% ↓
scroll	107,467	615.0%...

Page title	Views ▾	% Δ
Events Calendar - Unmistakably Lawr...	13,110	10.2%...
Winter Wonder Pass	12,487	-
Kaw Valley Craft Pass	3,544	-70.7%...
Eat - Unmistakably Lawrence	3,489	-30.1%...
Holiday events in Lawrence, Kansas	3,148	85.1%...
Explore - Unmistakably Lawrence	2,630	-12.4%...
Concerts & Live Music	2,496	95.6%...
Final Fridays in Lawrence, Kansas	2,231	723.2%...
Shop - Unmistakably Lawrence	2,177	-29.3%...
Lawrence Restaurant Week Save the ...	1,792	-

EXPLORELAWRENCE.COM USERS

In November, the states users visited explorelawrence.com the most from were Kansas, Missouri, Illinois, Texas and Colorado.

There were slightly more female than male users. The majority of users were between the ages of 25-54, although we do seem to be seeing an uptick in users ages 18-24. Users share interests in news, sports, movies, TV, cooking, travel, technology, and shopping.



EXPLORELAWRENCE.COM ACQUISITION

The leading traffic channels were paid search, organic search, direct traffic, organic social, and referral traffic. The top traffic sources were Google, Facebook, Bing, stackadapt, and ku.edu. It's encouraging to see the increase in organic traffic compared to last year.

Session default channel group	Sessions ▾	% Δ	Session source	Sessions ▾	% Δ
Organic Search	17,335	11.1%...	google	32,693	9.4% ↑
Paid Search	13,876	115.1%...	(direct)	3,498	-15.3%...
Display	3,499	-57.3%...	stackadapt	1,112	-
Direct	3,498	-15.3%...	m.facebook.com	633	-62.9%...
Organic Social	1,637	-74.2%...	bing	570	97.2%...
Referral	1,620	99.3%...	facebook.com	503	-85.4%...
Email	230	105.4%...	storage.googleapis.com	329	-
Unassigned	98	-60.2%...	travelks.com	239	291.8%...
Organic Video	8	-70.4%...	ku.edu	224	729.6%...
Organic Shopping	1	-	lm.facebook.com	205	-63.1%...

SOCIAL MEDIA

November's social media activity on Facebook, Instagram, Twitter, and TikTok resulted in X new fans, over 150,000 impressions, 27,9034 post engagements, and over 11,000 video views. Popular content included welcoming the launch of the Winter Wonder Pass, upcoming Holiday events, Kaw Valley Craft Pass, a Football game day guide, win an epic football weekend, live music, and Final Fridays.

Platform	Impressions ▾	Engagement	Video Views	New Followers
Instagram	122,949	76,039	10,521	197
Facebook	72,792	51,181	4,423	67
TikTok	1,866	1,135	1,095	35
Twitter	1,803	0	0	0
null	null	null	null	null

Impressions

199,410

Engagement

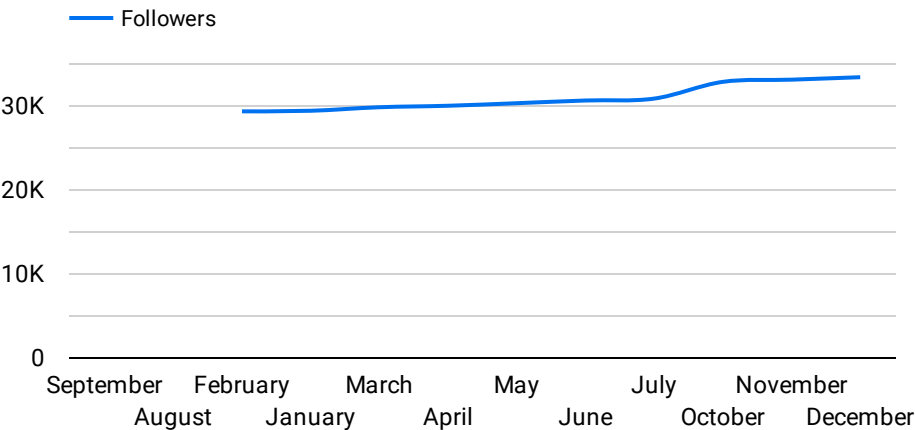
128,355

Video Views

16,039

New Followers

299



ENEWS

The December leisure e-blast was sent the last week of November to include our lighting and Santa rescue event. This is a repeat report of last month. The e-blast was sent to 12,462 recipients. 5,173 recipients opened the email, and there were 490 clicks on links within the email.

Recipients

12,462

Opens

5,173

Clicks

490

Link	Clicks ▾
Old Fashioned Christmas Parade Blog	66
events/holiday	66
Old Fashioned Christmas Parade event listing	61
Winter Wonder Pass	33
Blog/rocking around the Christmas tree	28
Inclusive Holiday market	24
Festival of Trees	17

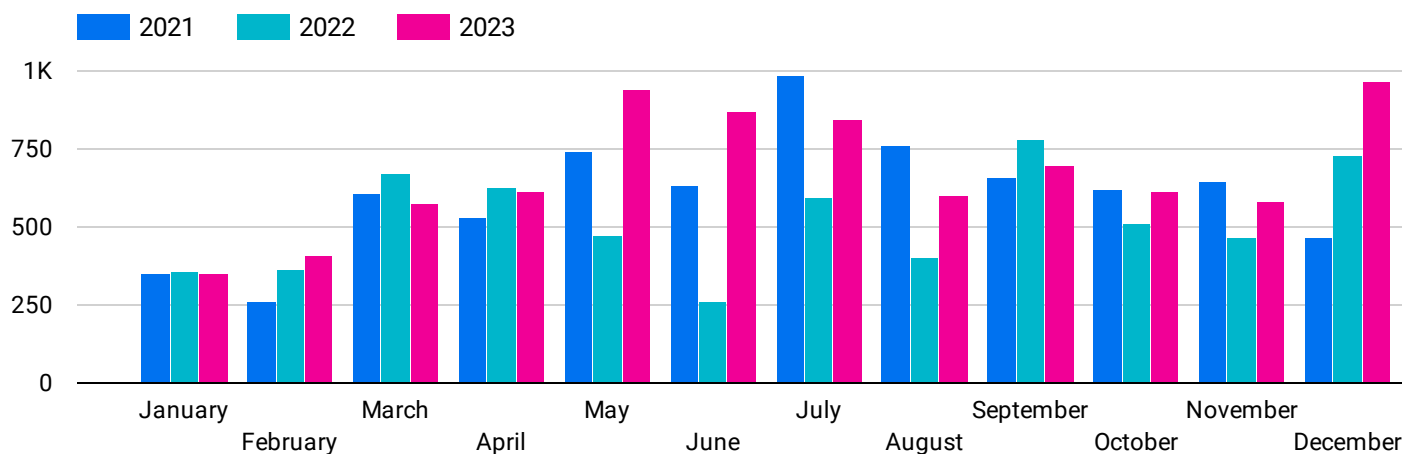


December 2023 VISITOR CENTER REPORT

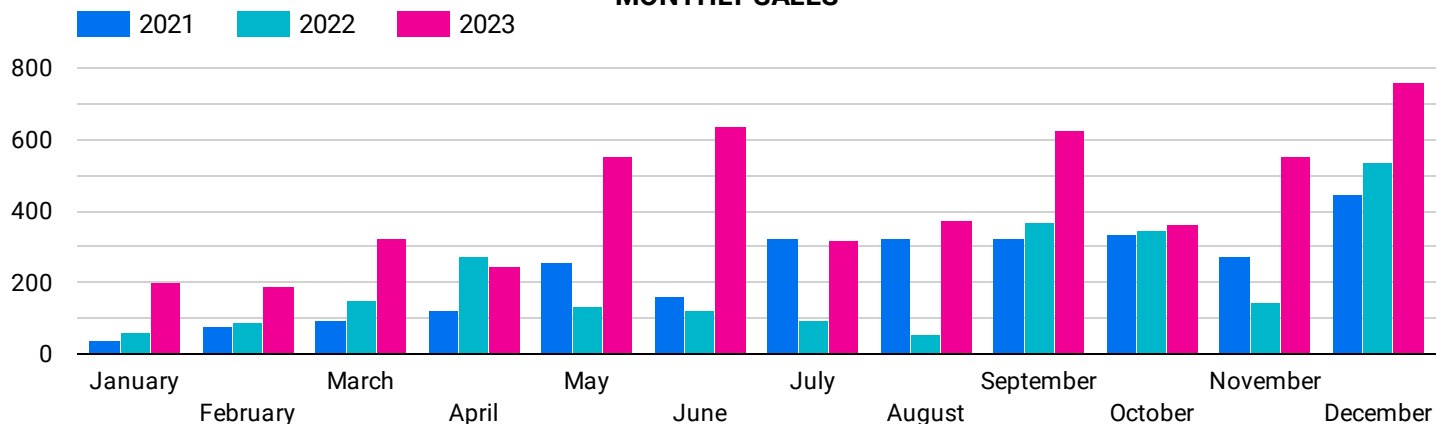
DECEMBER VISITOR CENTER SUMMARY

December was a great month with the visitor count at 968, an increase from 586 in November. The sales for December were the best for all of 2023. The total came to \$758.50. Large travel tumblers were the top-selling item at the Visitor Center with \$133 in revenue followed by postcards and stickers. Last month's featured Final Fridays artist was Steve Pierce. His photography showcases the images he has seen while running the backroads of Douglas County. His work will be on display until the last week of January.

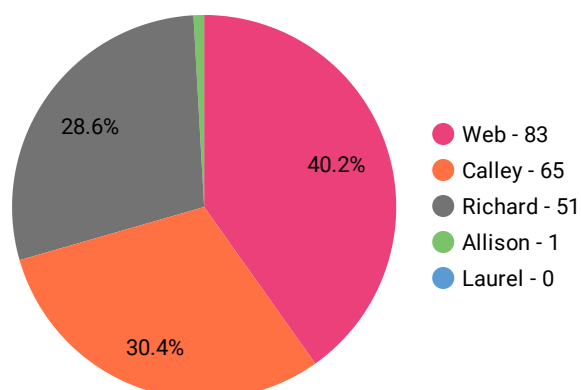
VISITORS CENTER WALK-INS



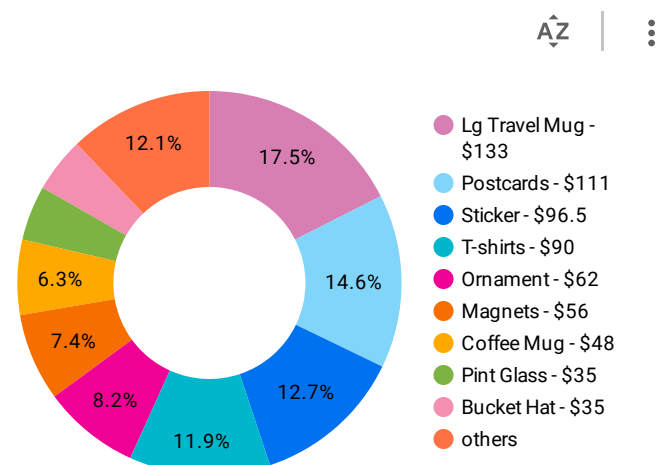
MONTHLY SALES



CALENDAR OF EVENT ENTRIES



PRODUCT SALES

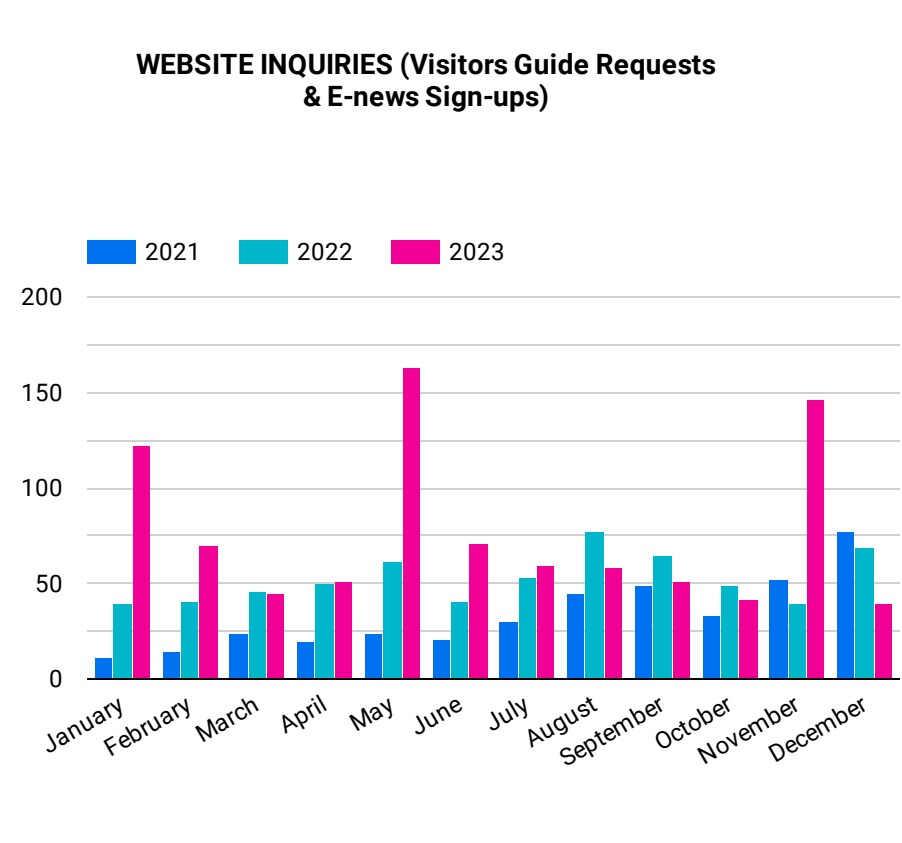


VISITORS CENTER PARTNER REFERRALS

	Account Name	Decembe...
1.	Watkins History Museum	5
2.	Merchant's	5
3.	1900 Barker on Mass	4
4.	Free State Brewery	4
5.	KU Natural History Mueum	4
6.	Antique Mall	4
7.	LFK Press	3
8.	Acme	3
9.	Sunflower Bike Shop	3
10.	Rally House	3
11.	Reclaimed by Michele	2
12.	Weaver's	2
13.	Pickleman's	2
14.	Free State Collectable's	2
15.	Baker Wetlands	2
16.	Limestone	2
17.	Noodle Co.	2
18.	Wine Dive + Kitchen	2
19.	Rudy's	2
20.	Burger Stand	2
21.	Amy's Attic	2
22.	Paleteria Chihuahua	1
23.	Lawrence Beer Co.	1
24.	Casa Grande	1

WEBSITE INQUIRIES

The Visitors Center fulfills requests for Visitors Guides that come through the website. There were 147 website inquiries for Visitors Guides and e-newsletter sign-ups in November. Visitors are asked about their interests when they request information. The most popular interests in November were Events, Arts & Culture, Food, Shopping, and Recreation.



WEBSITE INQUIRIES - INTERESTS

	Interest	Count ▾
1.	Food	42
2.	Events	30
3.	Shopping	26
4.	Arts/Culture	24
5.	History	22
6.	Wellness	18
7.	Recreation	16
8.	Family	15
9.	Haunted	13
10.	Universities	13
11.	Basketball	11
12.	Agri-Tourism	11

GROUP ORDERS

There were no group orders for December 2023

Board Report for December 2023 – Sales

GOALS

- Currently sitting at 103 of 65 (goal) for YTD 158%
- Currently sitting at 4.5 Million of 3 Million (goal) 152%

Sales OUT AND ABOUT

- EL Submitted a Tree to Festival of Trees, raised \$1400
- Attended Festival of Trees auction
- Attended Meet KS meeting in Topeka
- Attended KSAE Expo in Topeka and Tabled for event
- DAY AROUND LAWRENCE – Rock Chalk Park, SPL, KU New Crossing, New Skateboarding park, YSI Fields, KU Rugby Fields.
- Toured Lawrence's new Bus Station – Made great connections!
- Attended Chamber Legislative Breakfast
- Attended TGT Presentation meeting
- Attended TGT Recommendation meeting
- Christmas Parade
- Hosted Ambassadors Training Class at Lied Center
- Delivered Holiday Gifts to Partners
- Delivered information to Restaurants for Restaurant Week
- Served on Leadership Lawrence Panel
- Attended several Zooms with Jayhawk Hospitality on New Conference Center

Work in Progress –

2024 Topeka Impact – working with planners of Guarantees for Hotels.

North American Chinese Basketball Association – Memorial Day 2026

African American Quilt Convention – June 2023

National Fishing League – New Ownership, Adding High School Fishing

World Cup – 2026

Kimberlee Anspach

To: Jordan Parlegreco; Allison Calvin
Subject: RE: Placer.ai - Proposal

From: Jordan Parlegreco <jordan.parlegreco@placer.ai>
Sent: Wednesday, January 10, 2024 1:55 PM
To: Allison Calvin <allison@explorelawrence.com>; Kimberlee Anspach <kanspach@explorelawrence.com>
Subject: Re: Placer.ai - Proposal

Kim, Allison -

Thank you both for the time yesterday! Sending over a few case studies for you to review and see how other orgs are currently using our data.

[Case Study - Proving event value and securing new grants \(Prescott, AZ\)](#)

[Case Study - Grand Forks Wins \\$100k Grant to Revitalize Town Square](#)

[Case Study - Securing \\$85M to Fund a Park](#)

[Case Study - Predicting Business and Category Impact of Road Construction](#)

[Case Study - Fox Lake uses Placer to land \\$335M in New Development](#)

- [Civic Solutions Slide Deck](#)
- [Video \(47sec\):](#) Client Testimonials



Explore Lawrence

About Placer.ai:

- Placer is a location analytics software powered by mobile data. Placer monitors tens of millions of mobile devices across the United States to provide data on any physical location (retailer, park, event, downtown, etc.).
- Placer sources and curates this proprietary mobile data panel via direct relationships with mobile application partners. We only collect location data (no device IDs or PII) from those devices who download a partner app and opt in to 24/7 background location sharing.

Placer.ai Differentiators:

- **Proprietary Mobile Data Panel:** we are the only mobile data provider who sources and owns our panel entirely.
 - We do not buy aggregated mobile data sets from mobile data brokers and attach a user interface on the front.
 - This allows us the full capability to clean the data of all device IDs/PII to ensure we are unaffected by any changes to mobile data like iOS updates.
 - Other mobile data providers have experienced significant degradation in their data set and resulting accuracy as a result of such updates to mobile data.
 - We have not missed a day of data refresh on our 3-4 day lag since inception and do not expect any adverse effects of future mobile data changes due to our unique approach.
- **Unlimited POIs:** track as many POIs in Placer as you would like. You can draw your own geofences directly in the dashboard using the Create POI tool, or ask our team to draw them for you, and edit them at any time. These are not limited by geography either - you can draw geofences for any physical place in the US, subject to sensitive location restrictions (military bases, govt buildings, etc).
- **Accuracy:** Placer data has been and continues to be tested extensively by our prospective and current customers, including hundreds of DMOs and large retailers/restaurants like Target, Lowe's, Publix, Raising Canes, and more.
- **Consultative Relationship:** via your dedicated Customer Success Manager, you will have access to training, regular meetings, best practices, etc to ensure you can easily and quickly get value from Placer data.
 - This person will also have in-depth conversations with you if there are any discrepancies you notice in the data. Sometimes it's the result of a geofence being drawn incorrectly which we can fix, other times there are contextual explanations as to why the data may look off.

Primary Use Cases:

The following represents how over 750 civic entities and DMOs are currently leveraging Placer.ai data for success.

1. **Analyze Visitor Demographics/Psychographics:** Access near real-time self-service data to inform prospecting, campaign spend and results.
2. **Measuring Event Impact:** Drive event attendance, optimize marketing, maximize sponsorship and vendors, measure true attendance. Reveal economic impact of events (hotels, dining, entertainment, etc.)
 - a. [Prescott AZ quantifies annual event impact, secures \\$200k in Grants](#)
 - b. [Nebraska State Fair Uses Placer to Raise New Sponsor Rates 20% and Increase Revenue by Six Figures](#)
3. **Enhance and Measure Marketing Campaign Efficacy:** Ensure media budget dollars are maximized by optimizing advertisement site selection based on demographic and psychographic profiles of passersby.
4. **Monitor Tourism Movement:** Analyze overnight visitor metrics, reveal visitation to any attraction or destination, see where tourists live, understand tourist preferences for hotels, dining, retail, leisure etc.
5. **Support Local Businesses:** Identify gaps in retail offerings, Provide insights to any business about hours of operation, customers and marketing effectiveness
6. **Workforce Analysis & Business Attraction:** Analyze workforce demographics, remote work, bolster recruitment and retention efforts



Summary of Placer.ai Features:

- Visitation Data (Visitors, Employees, Residents) to any physical place
- Hourly visits, Daily Visits and Dwell time to any place
- Data that goes back to Jan 1 2017 and as recent as 3-4 days ago
- Home/work location of visitors
- Where else visitors go (dine, shop, leisure, hotels, etc.)
- Demographics/psychographics of Visitors
- Vehicle Traffic volume for any street as well as routes visitors take to get to any venue
- Travel & Tourism (overnight stay) Data
- Covid Recovery Data
- Event Impact Reports

Subscription Includes:

- 12-month Minimum Commitment
- Unlimited Nationwide Data
- Unlimited User Licenses
- Unlimited Requests for New POIs
- Dedicated Customer Success Manager
- PRICING
 - Standard 12-month agreement - \$38,500/year paid in full upfront on net 30 terms

Launch Plan:

- Account provisioned and initial user assigned post-signature
- Week 1: Kick Off Call with your CSM
- First Month: Onboarding & Training customized to your needs
- Continued Support: Ongoing meetings (frequency of your choice) as well as regular support via email/phone in between meetings



Staff Retreat

Friday, January 12, 2024 9:30 am – 3:30 pm 10th & Mass - LAC

Attendees: Kim Anspach, Laura Carbrey, Allison Calvin, Ruth DeWitt, Laurel Nagengast, Calley Vance

I. Welcome and Introductions

- Executive Director
 - Plans for the Day; Sorting exercise
- Facilitator
 - *Why is the work of eXplore Lawrence important?*
 - *What is one fun thing you love about your job?*
 - Calley: Our work is a community Service. Loves answering random visitor questions
 - Ruth: Economic Development side of the work and creating a cycle of prosperity
 - Laura: Community and opening up of her perspective. Fun is putting the puzzle together and overcoming a NO
 - Allison: Economic impact of our work and supporting businesses. Building the message of community support. Loves that every day can be different.
 - Laurel: Loves sharing Lawrence with people and being the neutral entity that can uplift diverse voices and help makes difference.
 - Kim: the community impact of our work. The serious work of economic development discussed as fun. Loves seeing the team grow and develop and succeed.

II. Great Team for a Great Year

- Personality Strengths and Work Styles
 - Strength Deployment Inventory (SDI)
 - Similarities, Differences, and Conflict sequences
- SDI Communication and teamwork

- SDI discussions at Staff Meeting. This can help us communicate and deploy ourselves more effectively.
- Adding a post Change/Delta discussion after large projects and events:
 - What went well and would do again
 - What do we need to do differently next time
 - Put these in notes for this event on our shared folder for the next time
 - Frame the future in a positive way.

III. Five Focus Areas

- Team and Self
 1. Clarity
 2. Protecting bandwidth
 3. Using our resources and tools
 4. Proactive thinking
 5. Review and refine process
- What does that mean to us?
 1. Clarity: defining priorities in a given situation.
 - Understanding our purpose and eXplore Lawrence's role in the community
 - Clear and concise goals as team. Are our individual goals helping the entire team?
 - Defining success for 2024. How do we assess next year if this was a good year?
 2. Protecting our Bandwidth
 - a. Saying no to projects that don't align with our priorities and goals.
 - b. Use our strategic plan to be able to say no to a really good idea because it doesn't align to our goals.
 - c. Organization and regular check ins with annual goals.
 - d. No yearend scramble
 - e. Reevaluating the projects we agreed to and if we want to continue with them and how to structure it so they are less taxing.
 - f. Self-preservation on physical and time demands.
 - g. Reasonable and manageable workload.
 - h. Picking projects that are actually doing what we need as an organization.

3. Using our resources and Tools
 - a. Resource audit. What programs do we use? Why do we use them? Do we need them? What can we cut and what do we need?
 - b. What tools are the most robust, what ones have you never heard of?
 - c. How do we fully leverage the tools at our disposal?
 - d. Can we save money and cut these?
 - e. Chunk this out and address a few at a time and not all at once.
4. Proactive Thinking
 - a. Thinking about events and what past struggles we've had and addressing them before they occur again
 - b. After action debriefs. Schedule a time to go over.
 - i. Plus/delta debrief
 - c. Anticipate things
 - d. Give things enough time and space to prepare and debrief
5. Review and refine process
 - a. Sales team needs to build a process from scratch for the sales life cycle.
 - b. What is known to work?
 - c. Who is going to do what?
 - d. Build around one another's strengths.
 - e. Create what works for us.

IV. Strategic Goals and Priorities

- Successes in 2023
 - Retail Sales at the Visitors Center best ever.
 - Increased follower counts on social and organic traffic to website and organic engagement.
 - Sales department 6 difference conferences in 2023 and made a log of good connections.
 - Landed new event from the trade show.
 - We have expanded our knowledge base and working relationships in the Sales department and campus.
 - Winter Wonder Pass development and success
 - Allison hired
 - We are viewing the challenges in our road as opportunities and working on plans to address the issues. Not feeling defeated by these things, but approaching with optimism and

opportunity mindset.

- Conveners of the community.
- Final Fridays at the VC
- Crushing the Sale Goals
- Ruth hired.
- Launched and promoted 4 separate passes. Winter Wonder Pass Blew away previous benchmarks of success
- Blew away our website goals
- Best visitation on record at VC
- Board goals 2024-2026
 - Debriefing the Board Retreat
 - Board is strong
 - Good rapport
 - Diverse Board in sector representation
 - Good access to decision makers and direct line to chancellor through David.
 -
- 2024 Staff priorities
 - *What is my role?*

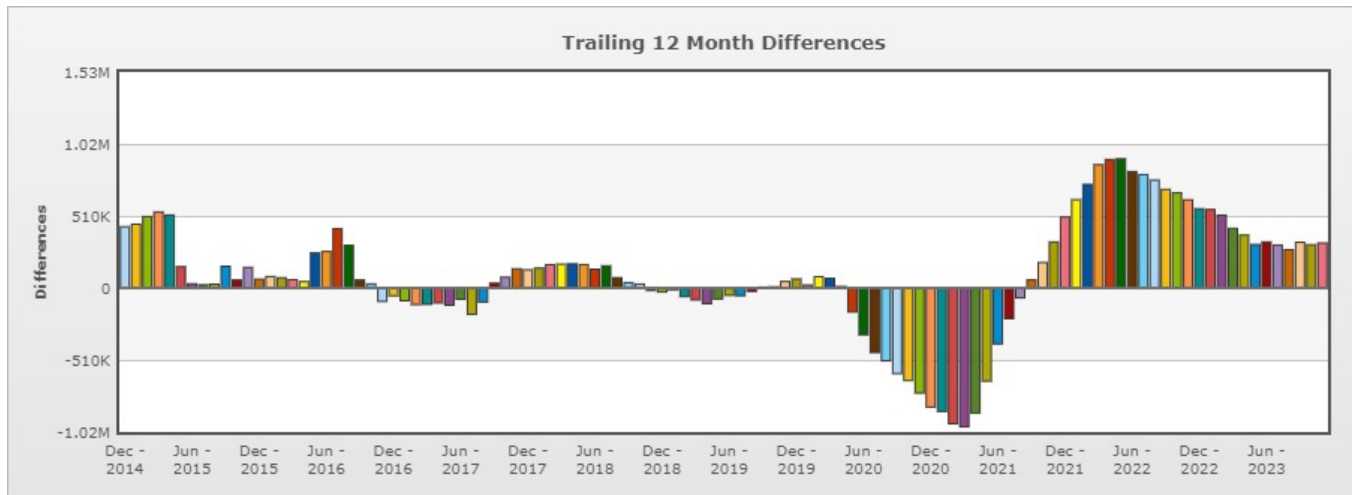
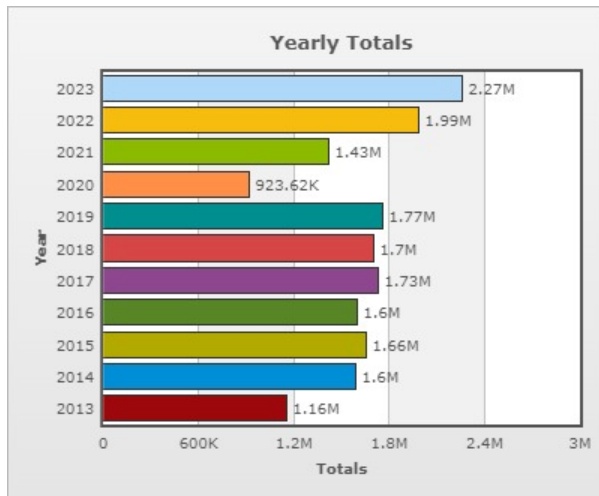
V. Next Steps

- Staff Retreat follow-up: Mapping 2024 priorities to strategic plan
- Deploying SDI strengths



Month	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2022/2023 % change
January	75,379	65,431	73,828	101,382	93,738	98,184	118,323	95,446	41,690	111,162	174,977	57.41%
February	69,236	46,262	77,086	99,205	94,007	113,533	84,797	115,542	58,116	108,425	119,220	9.96%
March	80,486	71,663	95,280	105,298	116,791	132,019	123,763	103,118	61,061	158,537	162,399	2.44%
Qtr 1	225,101	183,356	246,194	305,885	304,536	343,736	326,883	314,106	160,867	378,124	456,596	20.75%
April	74,396	109,986	124,152	124,594	134,997	147,412	133,185	61,358	87,896	151,582	167,214	10.31%
May	123,298	308,157	126,642	147,762	152,491	152,041	184,797	37,870	116,471	199,887	217,061	8.59%
June	126,460	215,298	183,250	161,930	183,216	171,487	185,634	38,022	154,237	180,085	224,361	24.59%
Qtr 2	324,154	633,441	434,044	434,286	470,704	470,940	503,616	137,250	358,604	531,554	608,636	14.50%
July	151,194	97,830	37,085	138,574	133,188	152,087	168,245	58,308	127,254	174,977	200,428	14.55%
August	71,944	139,165	211,166	164,378	204,992	161,411	149,099	78,147	154,104	190,619	193,987	1.77%
September	83,284	95,602	235,022	128,957	155,957	148,506	170,578	102,374	161,468	154,860	200,813	29.67%
Qtr 3	306,422	332,597	483,273	431,909	494,137	462,004	487,922	238,829	442,826	520,456	595,228	14.37%
October	126,849	211,198	197,756	156,868	157,890	148,412	140,822	83,871	150,112	191,637	216,140	12.79%
November	88,763	88,345	177,325	142,512	167,915	147,600	164,907	93,603	167,993	193,553	231,109	19.40%
December	90,707	146,836	119,115	131,421	136,028	130,316	142,582	55,963	145,672	171,800	158,559	-7.71%
Qtr 4	306,319	446,379	494,196	430,801	461,833	426,328	448,311	233,437	463,777	556,990	605,808	8.76%
Year Totals:	1,161,996	1,595,773	1,657,707	1,602,881	1,731,210	1,703,008	1,766,732	923,622	1,426,074	1,987,124	2,266,268	14.05%

** Transient Guest Tax increased from 5 to 6% in January of 2010





DECEMBER 2023 LODGING REPORT

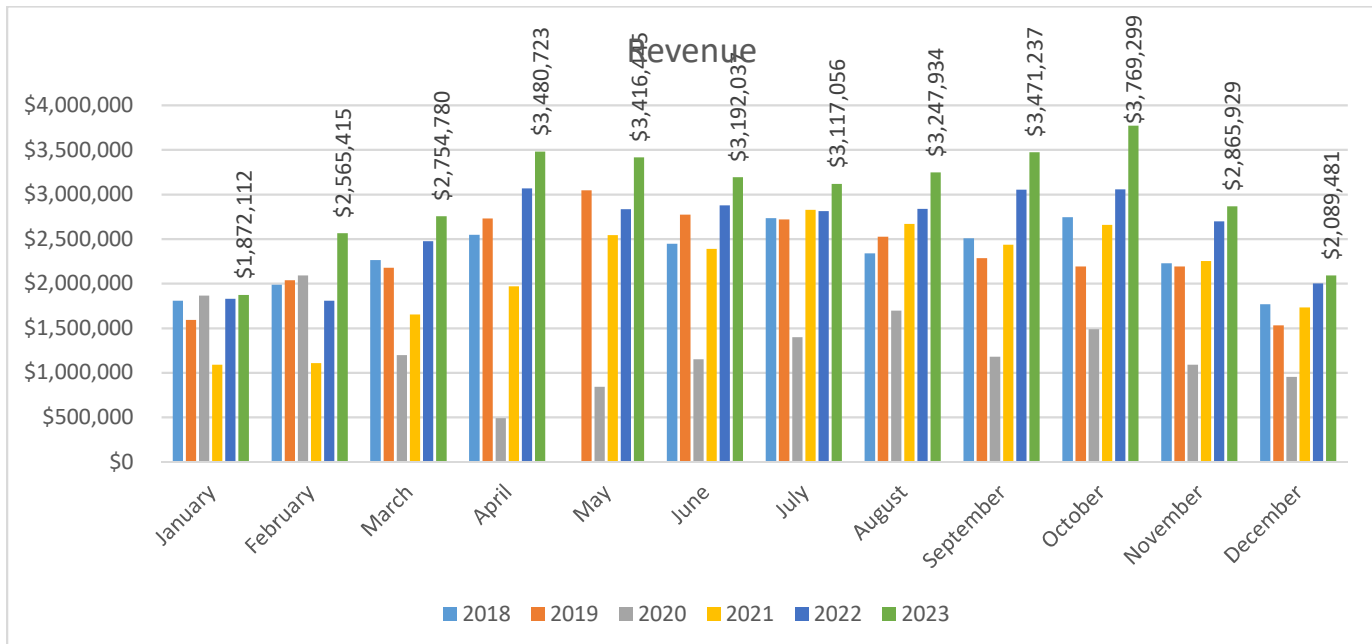
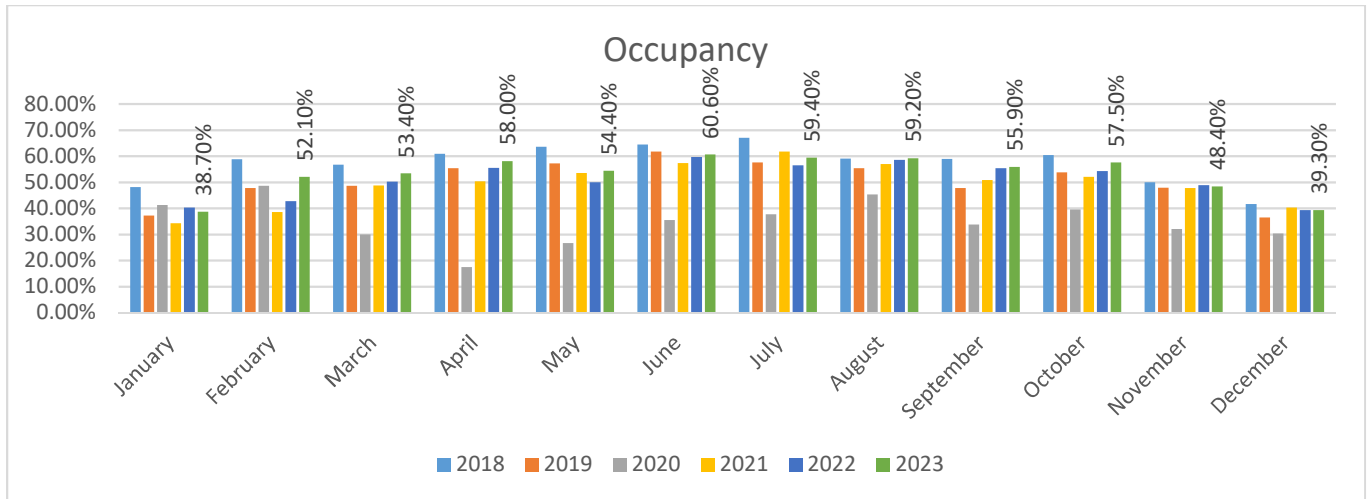
eXplore Lawrence has contracted with STR, Inc., a leading lodging industry research company, to provide monthly and annual lodging data for Lawrence, Kansas. The following report provides an analysis of the city.

There are six major areas of analysis contained in this report:

- 1) Occupancy Percent: Reflects the percentage of rooms occupied
- 2) Average Daily Rate (ADR): Reflects the average rate paid for rooms sold
- 3) RevPAR: Reflects the revenue per available room
- 4) Room Supply: Reflects the number of rooms available
- 5) Room Demand: Reflects the number of rooms sold
- 6) Room Revenue: Reflects the amount of revenue collected



Year over Year comparison. For internal use only.



The Douglas County, Kansas Visitor Industry, 2022

December 2023

Prepared for: Explore Lawrence



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INTRODUCTION

PROJECT BACKGROUND

The travel sector is an integral part of the Douglas County, Kansas economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of the county's economy. In 2022, tourism-supported jobs accounted for 7% of all jobs in the county.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs.

This is particularly true for Douglas County as its visitor economy recovers. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the significance of the visitor economy in Douglas County, 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 Douglas County, Kansas. The model traces the flow of visitor-related expenditures through the county'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 in overnight accommodations 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 the ES202 data.

The analysis draws on the following data sources:

- Kansas Department of Revenue: tax collections by industry, including bed and sales tax receipts
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry
- STR: lodging performance data, including room demand, room rates, occupancy, and room revenue
- Douglas County: guest tax receipts

ECONOMIC IMPACTS

KEY FINDINGS

VISITOR SPENDING

Driven by pent up demand and price increases of key commodities, visitor spending in Douglas County increased nearly \$34 million to reach \$279 million in 2022, surpassing pre-pandemic levels.

TOTAL ECONOMIC IMPACT

The \$279 million visitors spent in Douglas County sustained 3,515 jobs and generated \$30.5 million in state and local tax revenues in 2022.



\$279M

Visitor
Spending



3,515

Total
Jobs
Generated



\$30.5M

State & Local
Taxes
Generated



VISITOR INDICATOR TRENDS

SALES TAXES

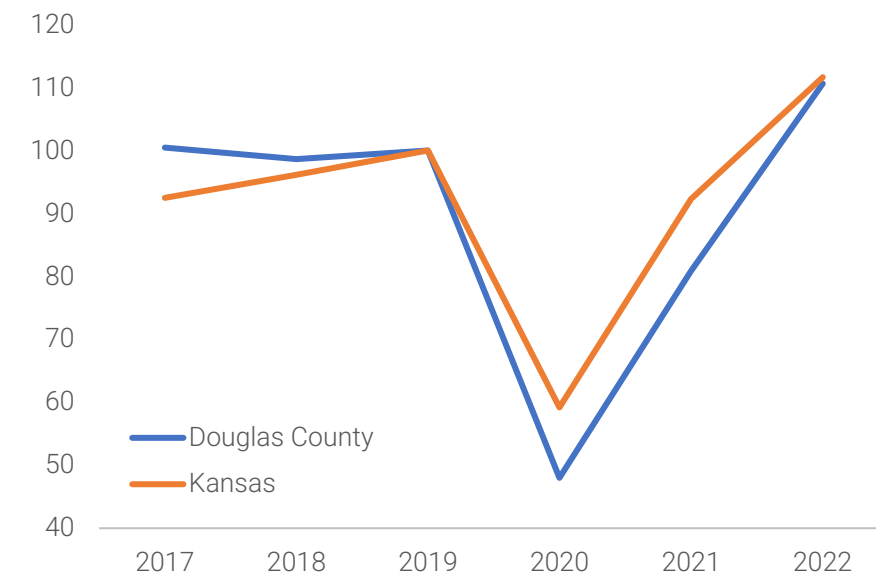
Understanding and comparing performance in local industries impacted by tourism at both the county and state level plays a key role in this analysis.

Lodging sales tax collections in Douglas County reached \$2.2 million in 2022, exceeding 2019’s total by 11% and setting a record for collections.

Sales tax collections from food & beverage businesses in 2022 totaled \$15.5 million, and at 14% higher than 2019 raised the bar for the industry’s collections for the second year in a row.

Taxable lodging sales

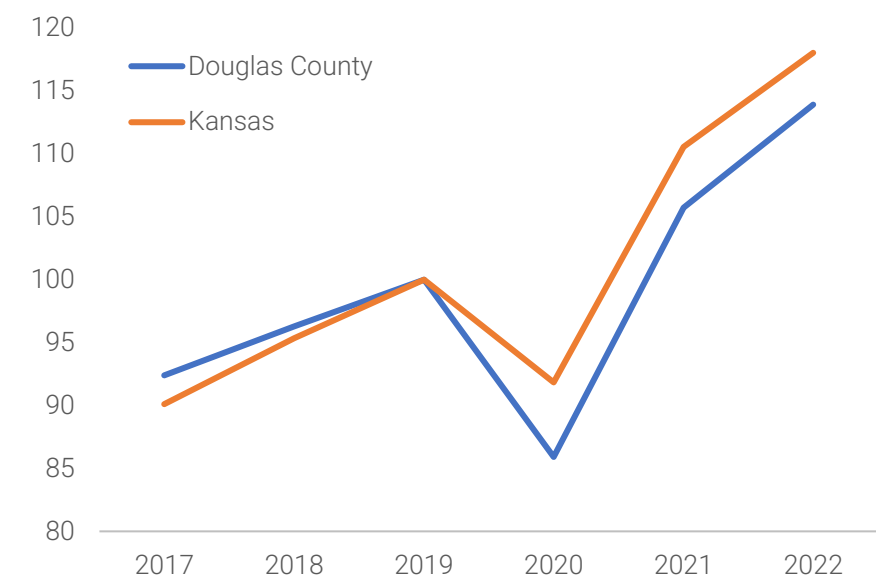
Indexed 2019=100



Source: Kansas Department of Revenue

Taxable food & beverage sales

Indexed 2019=100



Source: Kansas Department of Revenue

EMPLOYMENT MEASURES

As with sales taxes, employment growth provides insight into the impact of tourism within the economy.

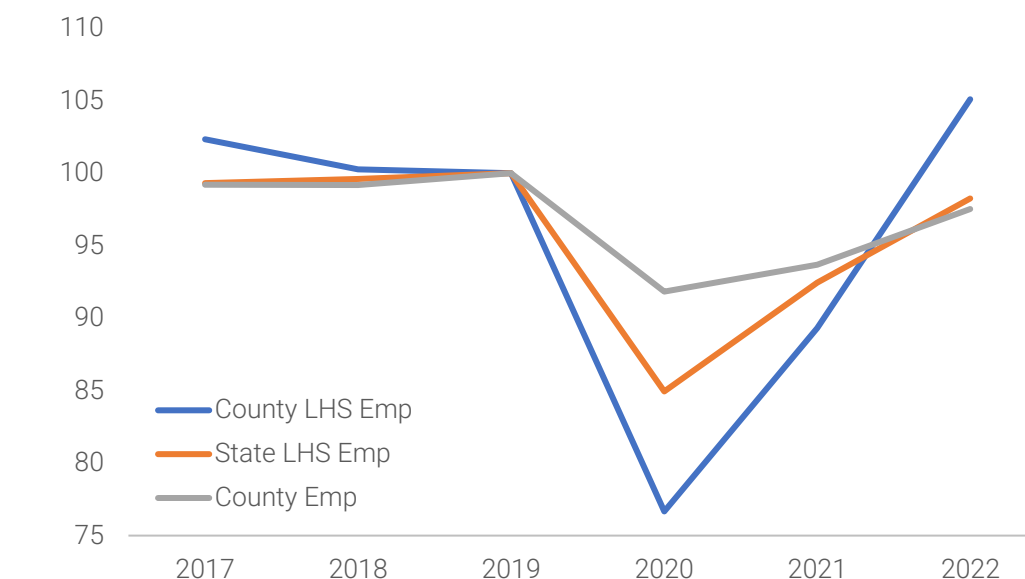
Employment in Douglas County’s leisure and hospitality services (LHS) grew 18% in 2022 and brought the sector to 5% above 2019 levels.

The sharp decline in LHS employment in 2020 dropped the sector’s employment index significantly below the county’s total employment index, a result of significant closures and restrictions during the pandemic. The county’s LHS employment rebounded in 2021 and 2022 as restrictions were lifted and both residents and visitors returned to eating out and enjoying recreational services.

The timelines of sales and employment indicate the severity of the pandemic but also the strength in the recovery once confidence in travel rebounded.

Employment growth

Indexed 2019=100



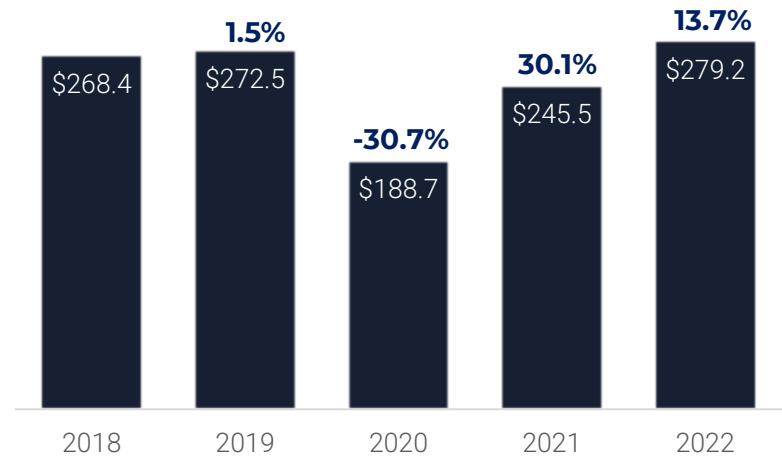
Source: BLS



VISITOR SPENDING

Visitor spending in Douglas County grew 14% in 2022, expanding to \$279 million. Strong growth in visitor spending on lodging and recreation and entertainment drove overall visitor spending levels above pre-pandemic levels.

Douglas County visitor spending
Amounts in \$ millions



Source: Tourism Economics

VISITOR SPENDING

Visitors to Douglas County, Kansas spent \$279 million across a range of sectors in 2022.

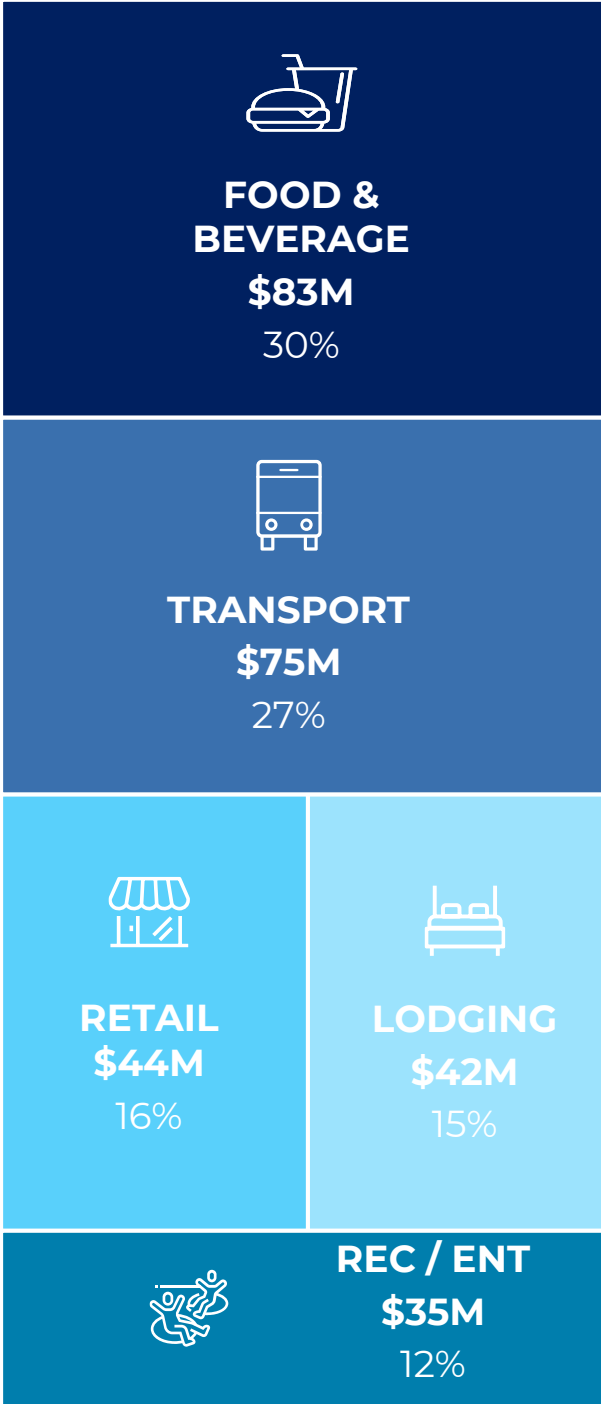
Visitor spending expanded 14% in 2022. Of the \$279 million visitors spent in Douglas County in 2022, spending on food & beverage registered \$83 million, 30% of visitor spending.

Transportation spending came in at 27% of overall spending, totaling more than \$75 million.

Spending on retail comprised 16% of visitor spending and reached \$44 million, while lodging spending, including the value of second homes and spending on short-term rentals, captured \$42 million, or 15% of visitor purchases.

Visitor spending on recreation and entertainment accounted for \$35 million, 12% of the total.

\$279 MILLION
Visitor Spending in 2022



Source: Tourism Economics
Note: Lodging spending is calculated as an industry. Spending also includes dollars spent on second homes and short-term rentals.

VISITOR SPENDING TRENDS

Visitor spending saw a second year of double-digit growth in all spending categories except for retail which fell just shy of that mark at 9%. With its sizeable growth of 26%, lodging recovered to within 8% of 2019 levels.

Douglas County visitor spending and annual growth

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

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Visitor spending	\$268.4	\$272.5	\$188.7	\$245.5	\$279.2	13.7%	102.5%
Food & beverage	\$76.7	\$79.1	\$61.4	\$74.5	\$82.9	11.3%	104.8%
Transportation	\$71.4	\$71.8	\$53.4	\$67.0	\$74.9	11.8%	104.3%
Retail	\$42.4	\$41.8	\$30.3	\$40.6	\$44.2	8.7%	105.8%
Lodging*	\$46.1	\$46.3	\$21.9	\$33.6	\$42.4	26.3%	91.7%
Recreation	\$31.8	\$33.5	\$21.7	\$29.8	\$34.8	16.5%	103.7%

Source: Tourism Economics

*Lodging includes dollars spent on second homes and short-term rentals

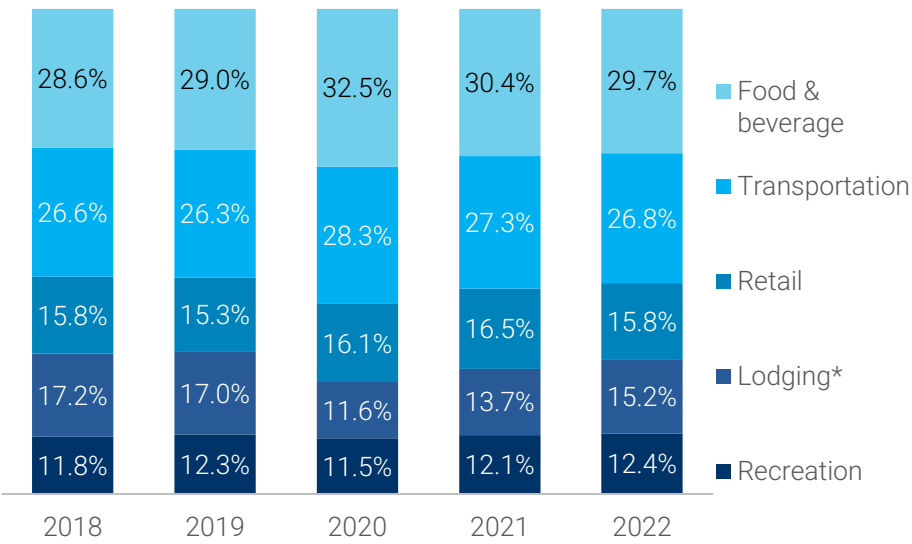
SPENDING SHARES

Shares in 2022

The categories of food & beverage and transportation continued to hold the two largest shares of visitors spending in 2022. Food & beverage spending in 2022 recorded the strongest growth in share at 0.7 percentage points higher than 2019’s level. Lodging experienced a significant decline in share in 2020 due to the pandemic but rebounded to 15.2 by 2022.

Douglas County Spending Shares, 2018-2022

By category, %



Source: Tourism Economics





ECONOMIC IMPACT METHODOLOGY

Our analysis of the Douglas County, Kansas visitor economy begins with direct visitor spending and 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 Douglas County, 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.

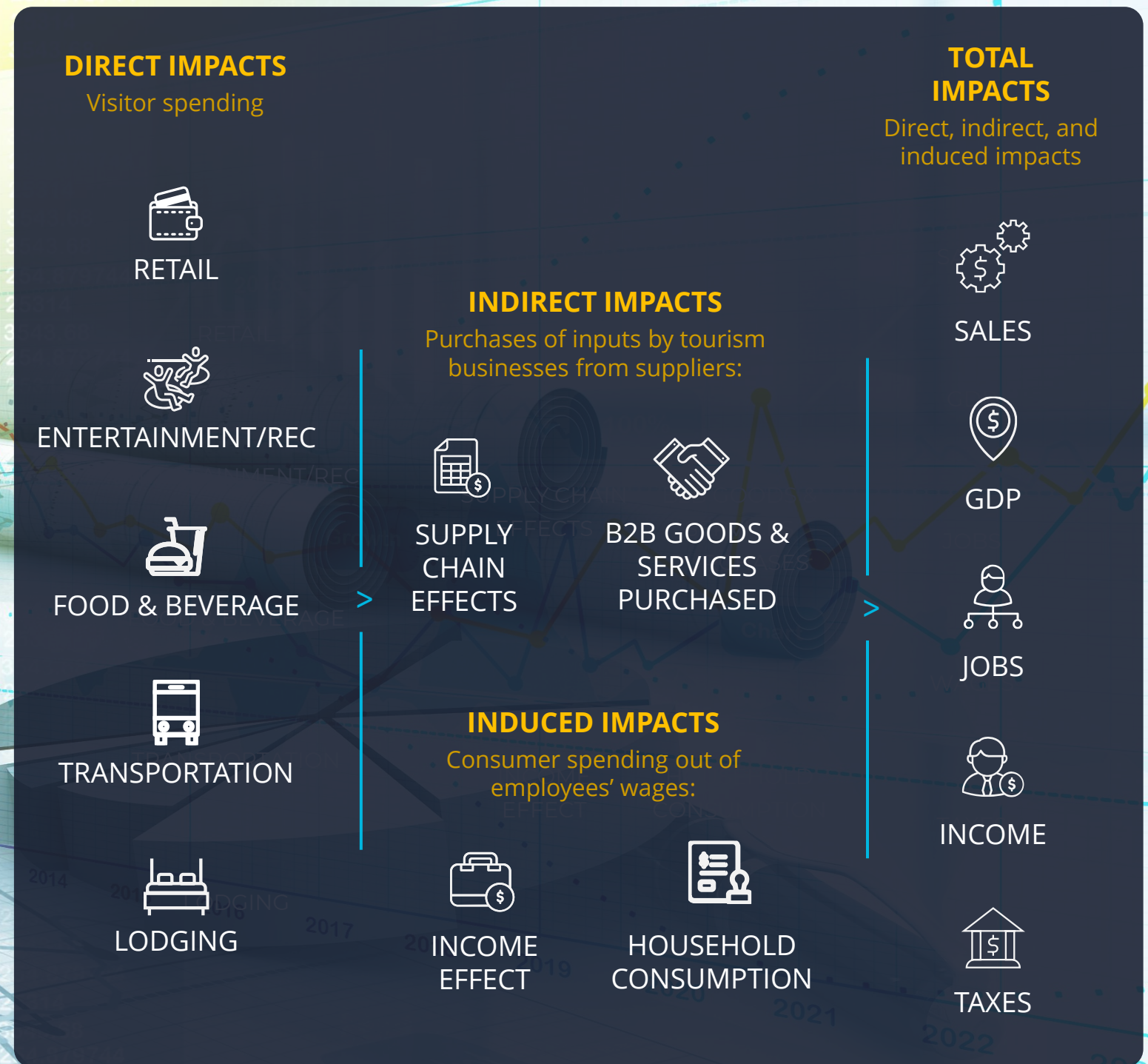
An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

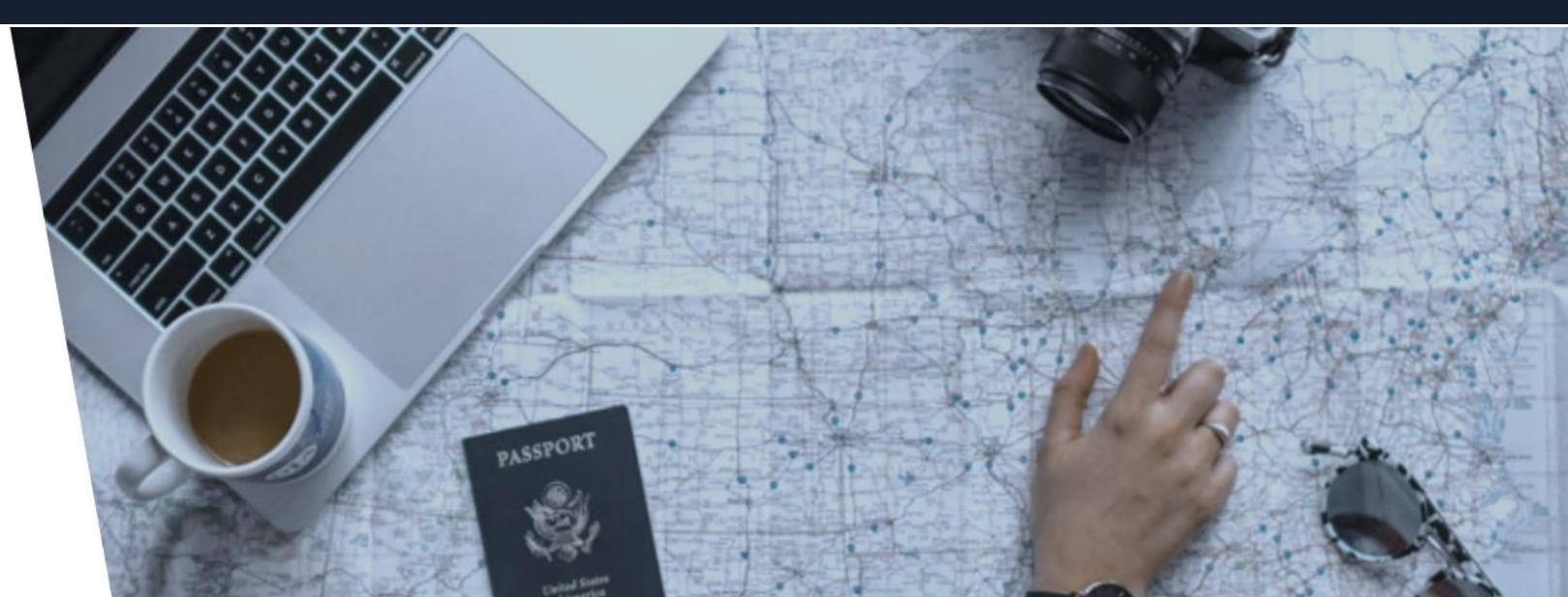
- 1. Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Each directly affected sector also purchases 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





ECONOMIC IMPACT FINDINGS

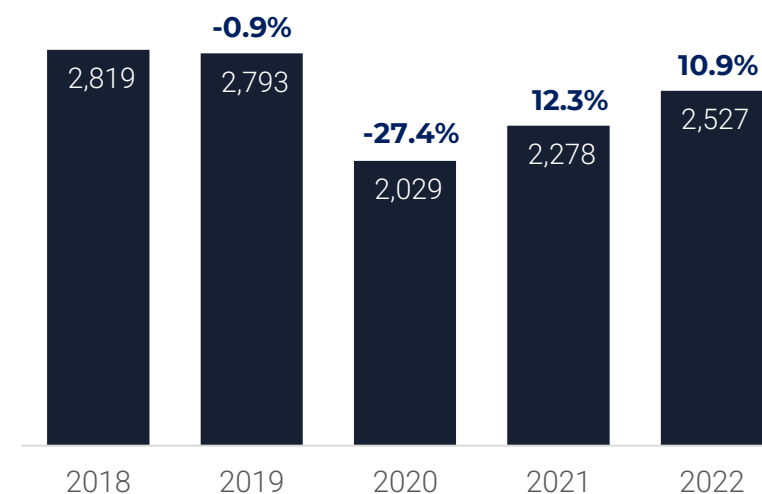
DIRECT IMPACTS

Employment supported by visitor activity rose 11% in 2022, reaching 2,527 jobs. The number of jobs increased by 249, rising to within 266 jobs of pre-pandemic levels, signaling a recovery of two-thirds of all pandemic job losses. The rebound of visitor-supported jobs lagged spending, with visitor-supported employment levels at 90% of pre-pandemic levels compared to 102% of spending in 2022.

The evaluation of the direct impact of visitor activity allows for comparisons and rankings against other industries. Based on employment levels, direct visitor-associated (tourism) employment ranked 6th in the county against other industries.

Direct employment in Douglas County

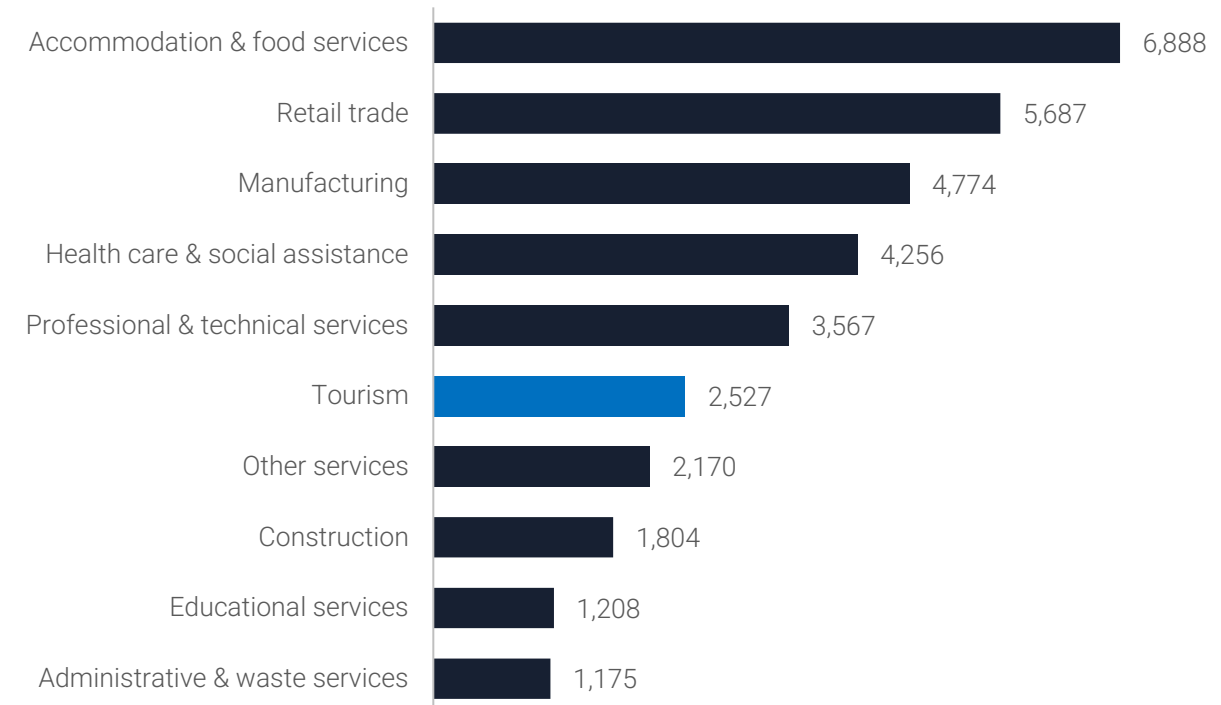
Amounts in number of jobs



Source: Tourism Economics

Direct employment in Douglas County, by major industry

Amounts in number of jobs



Source: BEA, BLS, Tourism Economics

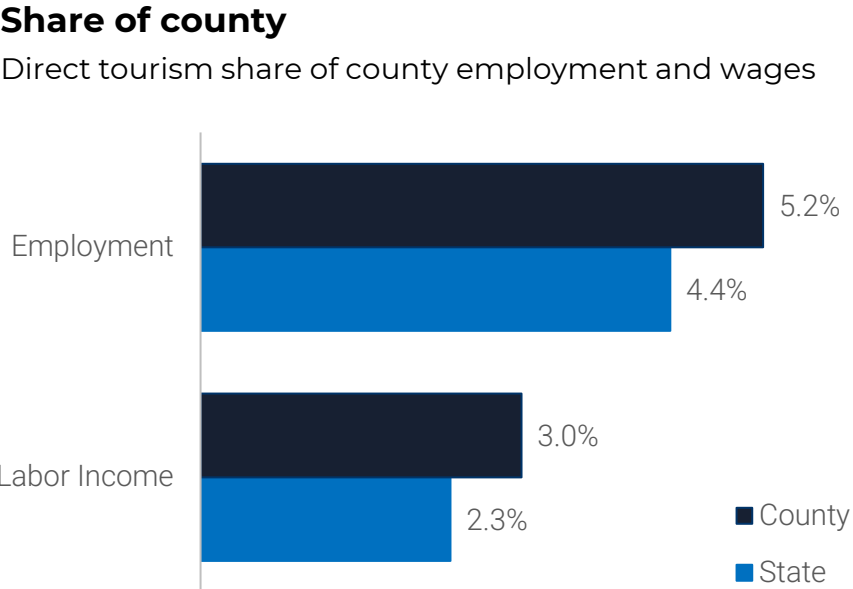


ECONOMIC IMPACT FINDINGS

IMPACTS

Visitor activity in Douglas County directly supported 2,527 jobs within the county. When including indirect and induced impacts, total employment registered 3,515 jobs, or 7% of all jobs in Douglas County. Total labor income associated with this level of employment reached \$109 million in 2022.

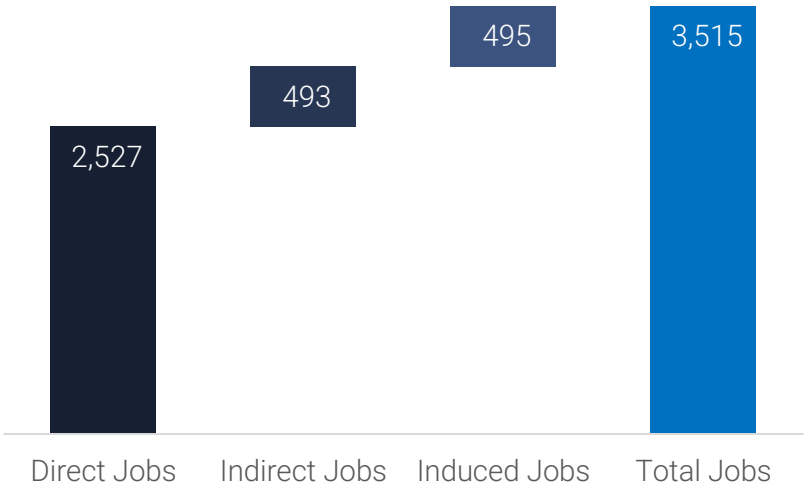
Visitor activity supports a larger share of direct jobs and labor income in Douglas County than the statewide share. The Douglas County economy's reliance on tourism outpaces the statewide average.



Source: BLS, Tourism Economics

Summary employment impacts (2022)

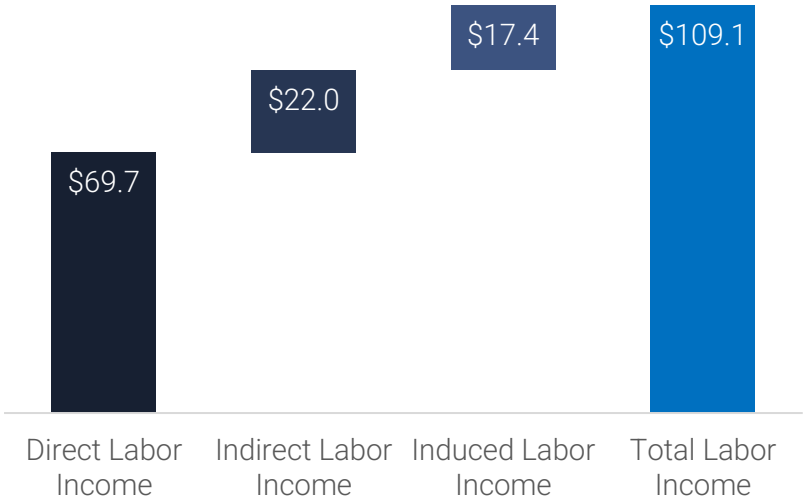
Amounts in number of jobs



Source: Tourism Economics

Summary labor income impacts (2022)

Amounts in \$ millions



Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

DIRECT IMPACTS

Douglas County’s \$279 million in visitor spending represented 3.6% of all visitor spending in Kansas. Douglas County’s share of visitor spending rose in 2022 as visitor spending growth in the county was stronger than that of the state.

Of all jobs directly supporting visitor activity in Kansas, 4.2% exist in Douglas County.

Local employees whose jobs directly rely on visitor activity earned \$70 million in wages and other income.

Direct impacts

Employment in jobs, spending and income in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Visitor Spending							
Douglas County	\$268.4	\$272.5	\$188.7	\$245.5	\$279.2	13.7%	102.5%
Kansas	\$7,106.6	\$7,326.6	\$5,445.7	\$6,960.3	\$7,676.8	10.3%	104.8%
Share	3.78%	3.72%	3.47%	3.53%	3.64%		
Employment							
Douglas County	2,819	2,793	2,029	2,278	2,527	10.9%	90.5%
Kansas	65,352	66,007	53,084	57,051	60,655	6.3%	91.9%
Share	4.31%	4.23%	3.82%	3.99%	4.17%		
Labor Income							
Douglas County	\$68.3	\$69.2	\$54.7	\$63.2	\$69.7	10.3%	100.7%
Kansas	\$1,746	\$1,801	\$1,517	\$1,721	\$1,905	10.6%	105.7%
Share	3.91%	3.84%	3.61%	3.67%	3.66%		

Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

TOTAL IMPACTS

Visitors supported 3,515 jobs in Douglas County or 1-in-14 jobs.

Douglas County job holders supported by visitor activity earned \$109 million in wages and benefits from their work.

Visitor activity supported \$30.5 million in state and local governmental revenues in 2022.

Total impacts

Employment in jobs, income and taxes in \$ millions

	2018	2019	2020	2021	2022	2022 Growth	% relative to 2019
Employment							
Douglas County	3,810	3,784	2,915	3,260	3,515	7.8%	92.9%
Kansas	96,590	97,234	80,152	84,431	88,509	4.8%	91.0%
Share	3.94%	3.89%	3.64%	3.86%	3.97%		
Labor Income							
Douglas County	\$ 106.2	\$ 107.8	\$ 88.3	\$ 100.4	\$ 109.1	8.6%	101.2%
Kansas	\$ 3,182	\$ 3,264	\$ 2,822	\$ 3,112	\$ 3,388	8.9%	103.8%
Share	3.34%	3.30%	3.13%	3.23%	3.22%		
State & Local Taxes							
Douglas County	\$24.7	\$26.6	\$21.5	\$25.5	\$30.5	19.7%	114.7%
Kansas	\$617.9	\$673.7	\$589.3	\$700.5	\$759.6	8.4%	112.7%
Share	3.99%	3.95%	3.64%	3.64%	4.01%		

Source: Tourism Economics

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 600 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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