2024

Economic Impact of Visitors to Overland Park, KS

Conducted by:

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Prepared for:

VISIT
overland
park

CONTENTS

Introduction

The travel sector is an integral part of the Overland Park economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of the city's future. In 2024, visitor-supported employment reached nearly 11,000 jobs in the city, including indirect and induced impacts.

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 Overland Park as it builds upon its visitor economy.

To quantify the significance of the Overland Park visitor economy, 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, incomes, and fiscal (tax) impacts in the broader economy.

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

Visitors included those who stayed overnight or traveled more than 50 miles to the destination. The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the ES202 data.

The analysis draws on the following data sources:

- STR and AirDNA: lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels and short-term rentals, respectively

- Kansas Department of Revenue: transient guest tax and sales tax data by industry for Johnson County and its cities

- Bureau of Economic Analysis and Bureau of Labor Statistics: employment, wage, and consumer price index data, by industry

- US Census: business sales by industry and seasonal second homes inventory

Economic Impact Methodology

Our analysis of the Overland Park 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 Overland Park 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.

IMPLAN remains a nationally recognized and widely used modeling tool, the leading provider of economic impact data and analytics software. The model traces the full extent of industry impacts as dollars flow through the local economy.
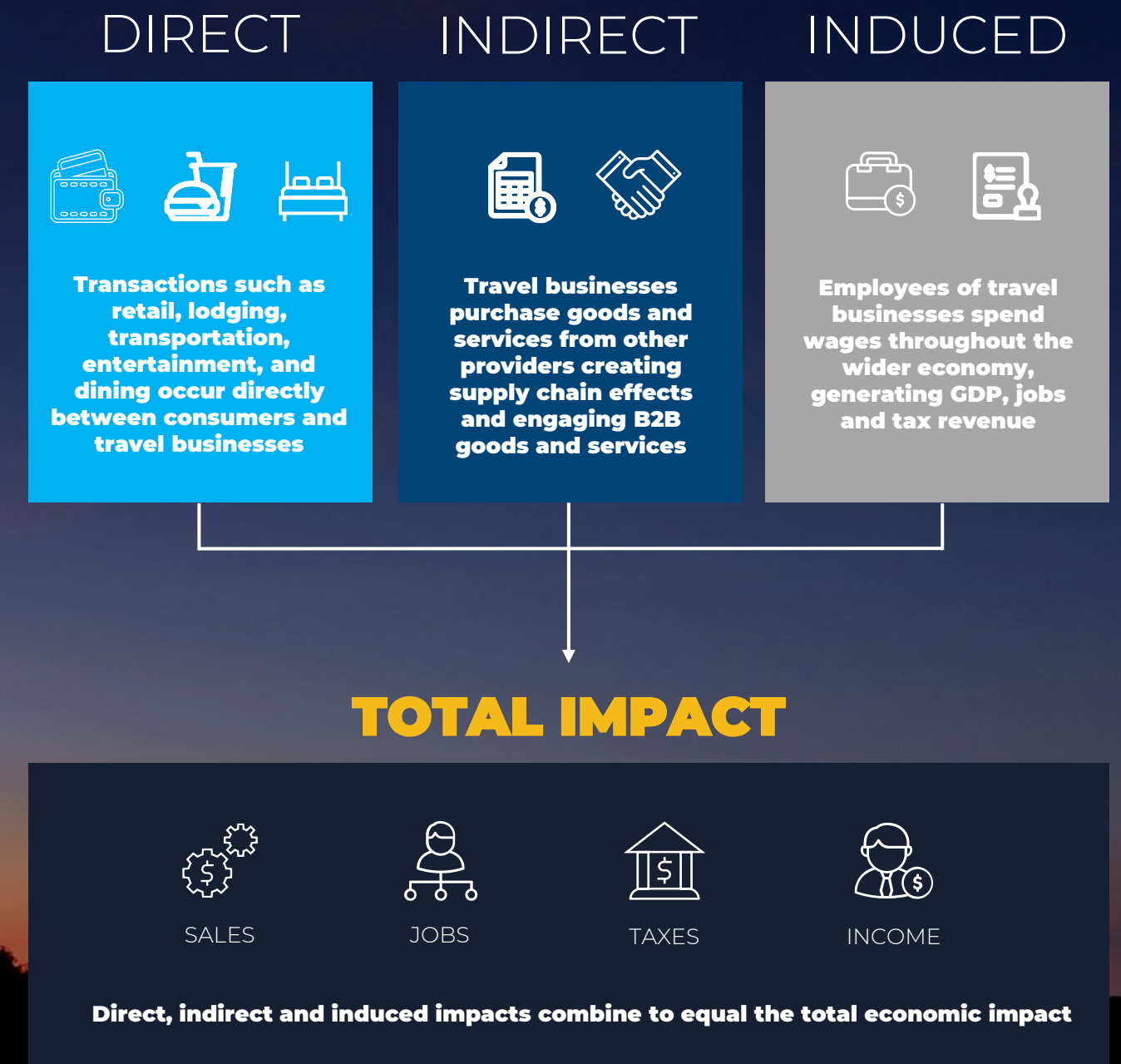
I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact:

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

2. **Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.

3. **Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

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

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

Economic Impact Framework

DIRECT
Transactions such as retail, lodging, transportation, entertainment, and dining occur directly between consumers and travel businesses

INDIRECT
Travel businesses purchase goods and services from other providers creating supply chain effects and engaging B2B goods and services

INDUCED
Employees of travel businesses spend wages throughout the wider economy, generating GDP, jobs and tax revenue

TOTAL IMPACT

SALES   JOBS   TAXES   INCOME

Direct, indirect and induced impacts combine to equal the total economic impact

Key Findings

The Visitor Economy Drives Economic Impact

In 2024, visitors to Overland Park, Kansas spent a record $964 million, an increase of 4.8% versus the prior year. Spending grew across all sectors, aided by solid demand, as well as higher prices of goods and services.

$964M
Visitor Spending

$1.5B
Total Business Sales

Economic Impacts of Visitors to Overland Park

Visitor spending of $964 million in 2024 generated a total economic impact of $1.5 billion in Overland Park, including indirect and induced impacts. This total economic impact generated $496 million in total labor income, sustained nearly 11,000 total jobs, and contributed to $103 million in state and local tax revenues in 2024.

$496M
Total Labor Income

11K
Total Jobs Supported

$103M
State and Local Taxes

Visitors to Overland Park spent **$964 million** in 2024.

Spending on food & beverage represented **27%** of Overland Park visitor spending in 2024.

Visitor Spending

Visitor spending in Overland Park increased 4.8% to a record $964 million in 2024.

By spending category, lodging, including short-term rentals and the value of second homes, grew fastest at 8.1% year-over-year to nearly $200 million as a result of solid room demand and price growth. Food and beverage spending increased 6.2% to approximately $265 million.

Recreation and retail spending increased 4.7% and 4.3%, respectively. Transportation grew 0.8% as declining gas prices offset stronger travel demand.
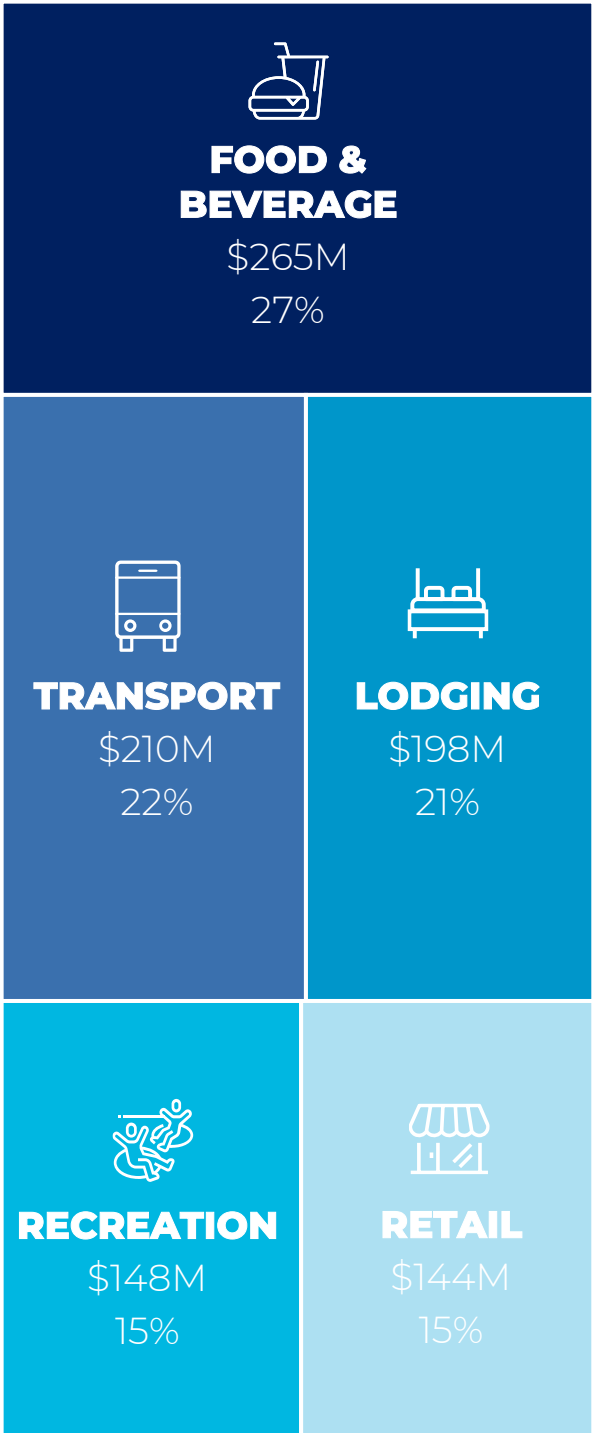
Overland Park Visitor Spending
$ millions

	2019	2020	2021	2022	2023	2024	2024 Growth	Relative to 2019
Total visitor spending	**$843**	**$502**	**$713**	**$852**	**$920**	**$964**	**4.8%**	**114.5%**
Food & beverage	$222	$150	$197	$225	$249	$265	6.2%	119.3%
Transportation	$185	$110	$172	$207	$208	$210	0.8%	113.1%
Lodging*	$192	$88	$132	$163	$183	$198	8.1%	103.4%
Recreation	$115	$73	$101	$127	$141	$148	4.7%	128.3%
Retail	$128	$81	$112	$131	$138	$144	4.3%	112.2%

Source: Tourism Economics

*Lodging spending includes the value of second homes and short-term rentals.

FOOD & BEVERAGE
$265M
27%

TRANSPORT
$210M
22%

LODGING
$198M
21%

RECREATION
$148M
15%

RETAIL
$144M
15%

Source: Tourism Economics

Visitors to Overland Park spent $964 million across various sectors in 2024.

Food and beverage spending totaled $265 million in 2024, representing the largest share of visitor spending in Overland Park at 27%.
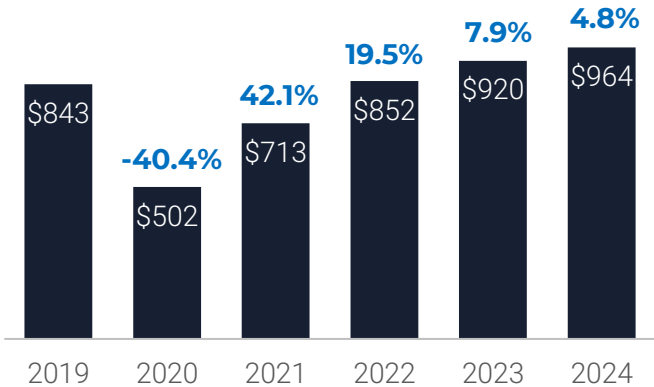
Transportation spending tallied $210 million or 22% of visitor spending.

Lodging spending, including the value of second homes and short-term rentals, was $198 million, 21% of the total.

Recreation and retail followed, each accounting for 15% of total spending.

Overland Park Visitor Spending
$ millions

2019	2020	2021	2022	2023	2024
$843	$502	$713	$852	$920	$964
	-40.4%	42.1%	19.5%	7.9%	4.8%

Source: Tourism Economics

Note: Lodging is defined as an industry and includes all services provided by hotel businesses. Lodging also includes dollars spent on second homes and short-term rentals.

Visitor Spending Segments

In 2024, spending by overnight visitors grew 5.8%, outpacing the 3.0% increase in spending by day visitors. Overnight visitor spending of $646 million accounted for two-thirds of all spending in Overland Park, of which lodging represented the largest share of overnight visitor spending at 31%. Day visitor spending of $319 million represented the remaining one-third of total visitor spending, of which transportation accounted for the largest share of day visitor spending at 33%.

Overland Park Visitor Spending by Segment
$ millions

	2019	2020	2021	2022	2023	2024	2024 Growth	2024 Share
Overnight visitor spend	**$571**	**$311**	**$456**	**$560**	**$610**	**$646**	**5.8%**	**100%**
Lodging*	$192	$88	$132	$163	$183	$198	8.1%	31%
Food & beverage	$141	$89	$122	$143	$159	$170	6.7%	26%
Transportation	$94	$51	$83	$103	$104	$105	1.0%	16%
Recreation	$76	$45	$64	$83	$93	$98	5.4%	15%
Retail	$68	$39	$55	$67	$72	$75	5.3%	12%

	2019	2020	2021	2022	2023	2024	2024 Growth	2024 Share
Day visitor spend	**$272**	**$191**	**$257**	**$292**	**$309**	**$319**	**3.0%**	**100%**
Transportation	$91	$59	$89	$104	$104	$105	0.5%	33%
Food & beverage	$80	$62	$75	$81	$90	$95	5.3%	30%
Retail	$61	$42	$56	$64	$67	$69	3.3%	22%
Recreation	$40	$28	$37	$44	$49	$50	3.5%	16%

Source: Tourism Economics

*Lodging spending includes the value of second homes and short-term rentals.

Overland Park Visitor Spending Share by Segment
Share of total visitor spending

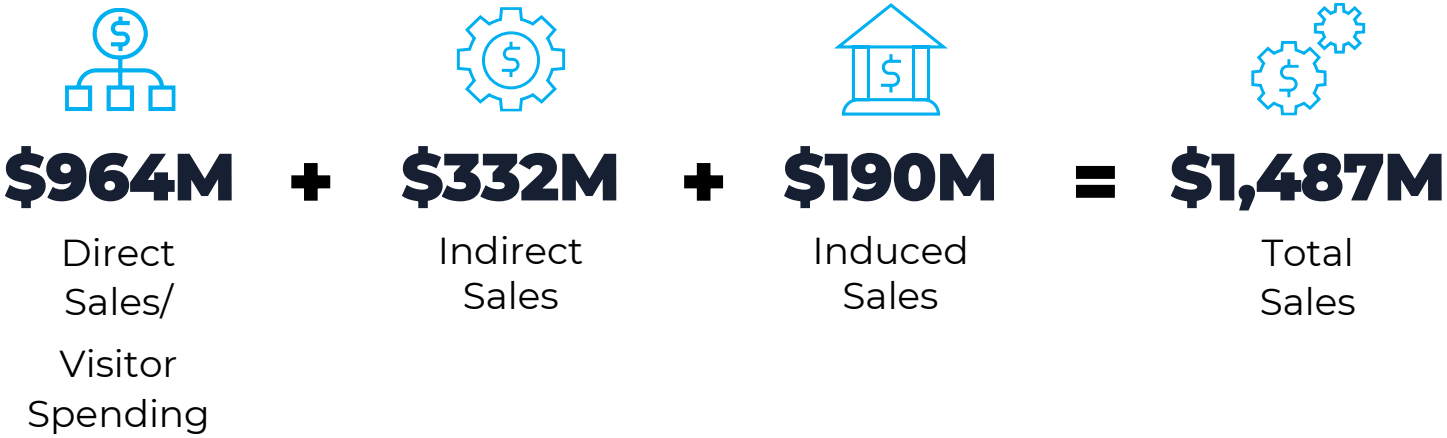**Day** 33%
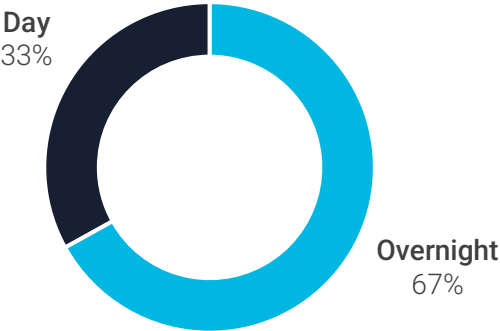
Overnight 67%

Source: Tourism Economics

Overnight visitor spending of $646 million accounted for **two-thirds of all spending** in Overland Park.

Business Sales Impacts

Visitors contributed a direct impact of $964 million in 2024. This direct impact generated $523 million in indirect and induced impacts, resulting in a total economic impact of $1.5 billion in the Overland Park economy.

$964M + **$332M** + **$190M** = **$1,487M**

Direct Sales/ Visitor Spending   Indirect Sales   Induced Sales   Total Sales

Business Sales Impacts by Industry (2024)
$ millions

|	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$964**	**$332**	**$190**	**$1,487**
Food & Beverage	$212	$12	$15	$239
Retail Trade	$197	$3	$16	$216
Finance, Insurance and Real Estate	$28	$115	$66	$209
Lodging	$198			$198
Gasoline Stations	$148	$0	$1	$149
Recreation and Entertainment	$133	$11	$2	$147
Business Services		$108	$15	$123
Other Transport	$33	$8	$2	$43
Education and Health Care		$1	$40	$41
Communications		$27	$12	$38
Personal Services	$14	$10	$8	$33
Wholesale Trade		$18	$10	$28
Construction and Utilities		$11	$3	$13
Government		$3	$1	$5
Manufacturing		$3	$1	$4
Agriculture, Fishing, Mining		$0	$0	$0
Air Transport		$0	$0	$0

Source: Tourism Economics

The total economic impact of **$1.5 billion** accrued to industries across the economy.

Direct Employment

Employment directly supported by visitor activity increased 3.7% in 2024 to 8,252 jobs. This equated to nearly 300 more jobs than the previous year, as visitor supported employment rose above 2019 levels for the first time.

Visitor Supported Employment in Overland Park
Jobs

| 2019	2020	2021	2022	2023	2024
8,215	-23.0% 6,322	14.2% 7,218	5.0% 7,580	4.9% 7,954	3.7% 8,252
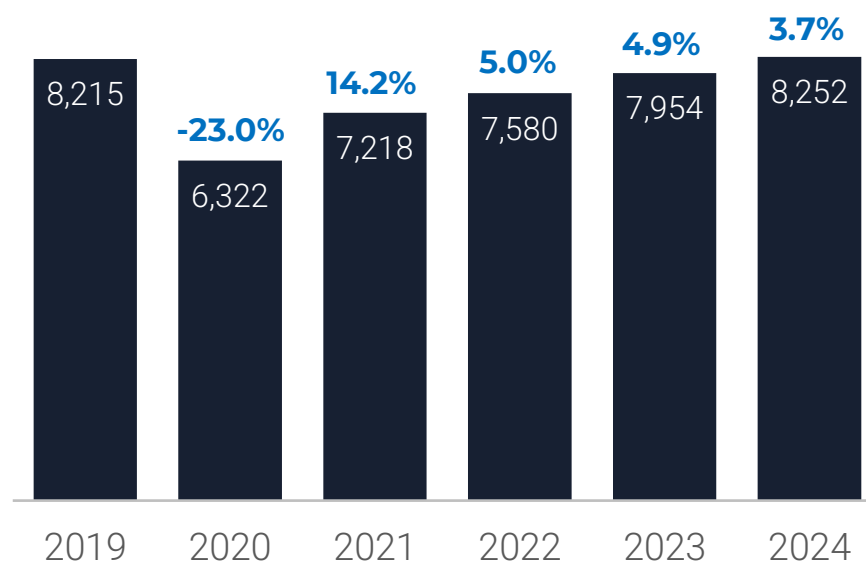
Source: Tourism Economics

The visitor economy in **Overland Park** directly supported **8,252 jobs**.

Employment Impacts

Visitor activity sustained 8,252 direct jobs in 2024, with an additional 2,717 jobs supported from the indirect and induced impacts of visitor activity. The total employment impact reached 10,968 jobs, equivalent to 5.9% of total employment in the city (or one-in-seventeen jobs). Visitor spending supported the largest number of jobs in the food and beverage industry (3,478).

8.3K
Direct Jobs

+

1.7K
Indirect Jobs

+

1.0K
Induced Jobs

=

11.0K
Total Jobs
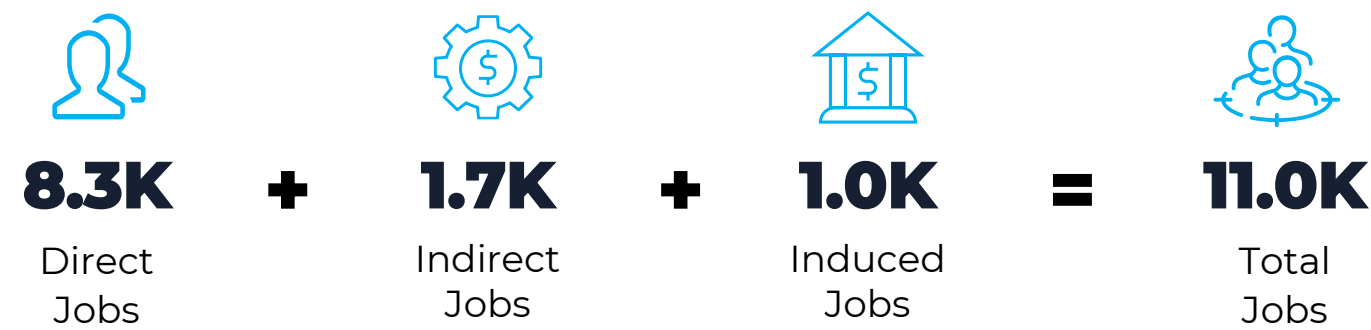
Employment Impacts by Industry (2024)

Jobs

|	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	**8,252**	**1,706**	**1,011**	**10,968**
Food & Beverage	3,204	149	125	3,478
Recreation and Entertainment	2,128	162	24	2,313
Lodging	1,276			1,276
Retail Trade	704	27	108	839
Other Transport	616	78	16	710
Business Services		583	75	657
Finance, Insurance and Real Estate	29	462	119	609
Education and Health Care		15	417	432
Personal Services	119	66	65	250
Gasoline Stations	176	1	5	183
Communications		52	28	80
Wholesale Trade		51	20	70
Construction and Utilities		36	6	42
Government		16	2	18
Manufacturing		9	1	10
Agriculture, Fishing, Mining	0	0		1
Air Transport	0	0		0

Source: Tourism Economics

The visitor economy supports **5.9% of all jobs** in Overland Park, including nearly **3,500 jobs** in the food and beverage industry.

Labor Income Impacts

Visitor activity generated $309 million in direct labor income and a total of $496 million including indirect and induced impacts.

$309M + **$119M** + **$68M** = **$496M**

Direct
Labor Income
      Indirect
Labor Income
      Induced
Labor Income
      Total
Labor Income
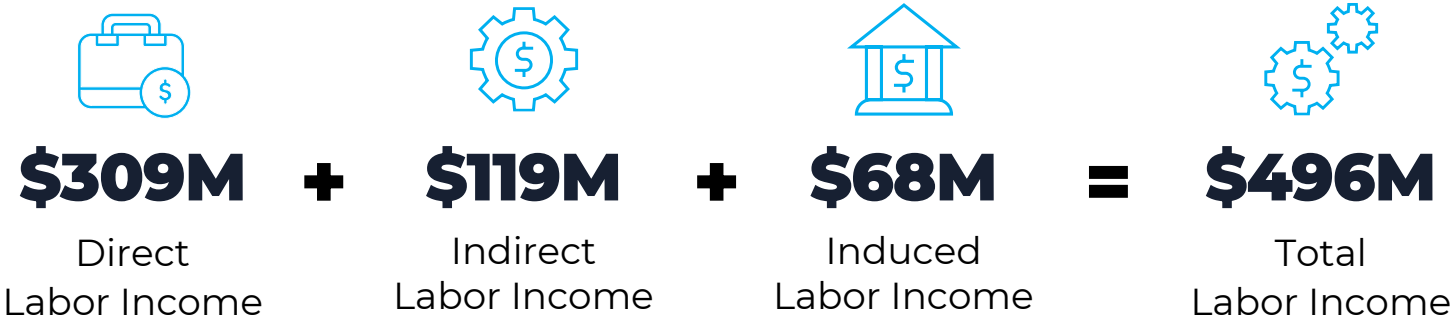
Labor Income Impacts by Industry (2024)
$ millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	**$309**	**$119**	**$68**	**$496**
Food & Beverage	$113	$5	$5	$122
Recreation and Entertainment	$64	$5	$1	$70
Business Services		$55	$7	$63
Lodging	$49			$49
Finance, Insurance and Real Estate	$10	$22	$8	$40
Retail Trade	$32	$1	$5	$39
Other Transport	$25	$4	$1	$29
Education and Health Care		$1	$27	$28
Personal Services	$8	$5	$4	$16
Communications		$8	$6	$15
Gasoline Stations	$9	$0	$0	$10
Wholesale Trade		$6	$3	$9
Construction and Utilities		$3	$1	$4
Government		$2	$0	$2
Manufacturing		$1	$0	$1
Agriculture, Fishing, Mining		$0	$0	$0
Air Transport		$0	$0	$0

Source: Tourism Economics

Visitor spending drives income across industries, including **eight industries with more than $25 million** in total income.

Tax Impacts

Visitor economy spending, visitor supported jobs, and business sales generated $193 million in total government revenues. State and local taxes alone tallied nearly $103 million in 2024.

Each household in Overland Park would need to be taxed an additional $1,240 to replace the visitor-generated taxes received by state and local governments in 2024.

Tax Impacts (2024)
$ millions

	Direct	Indirect / Induced	Total
Total Tax Revenues	**$134**	**$59**	**$193**
Federal Taxes	**$53**	**$38**	**$90**
Personal Income	$15	$12	$27
Corporate	$5	$4	$9
Indirect Business	$3	$1	$4
Social Insurance	$30	$21	$50
State and Local Taxes	**$82**	**$21**	**$103**
Sales	$36	$11	$47
Lodging	$12		$12
Personal Income	$4	$2	$6
Corporate	$2	$1	$3
Excise and Fees	$3	$1	$4
Property	$25	$6	$31

Source: Tourism Economics

Visitor-supported revenues to state government totaled $55 million in 2024. The majority of state revenues are from sales taxes of $29 million, with property taxes, income taxes, corporate taxes, and excise and fees accounting for the $25 million.

Local tax revenues from visitor activity reached $48 million in 2024, comprised of sales taxes, property taxes, lodging taxes, and fees. Of the $17 million in local sales tax revenue, county tax collections accounted for $9 million (52%), while municipal tax collections totaled $8 million (48%).

Tax Impacts (2024)
$ millions

	State	Local
Total Tax Revenues	**$55**	**$48**
Sales	$29	$17
Lodging		$12
Personal Income	$6	
Corporate	$3	
Excise and Fees	$2	$2
Property	$14	$17

Source: Tourism Economics

Results In Context

$964M
VISITOR SPENDING

The $964 million in visitor spending means that approximately $2.6 million was spent EVERY DAY by visitors in Overland Park.

$496M
LABOR INCOME

The visitor economy generates a total income of $496 million, equivalent to $6,000 per occupied household in Overland Park.

10,968
TOTAL JOBS

The number of jobs sustained by the visitor economy totaled 10,968, supporting 5.9% of all jobs in Overland Park.

$103M
STATE & LOCAL TAXES

Each household in Overland Park would need to be taxed an additional $1,240 to replace the visitor-generated taxes received by state and local governments in 2024.

Results In Context

Local Tax Impacts in Context

$48M LOCAL TAXES

The $48 million in local taxes generated by Overland Park's visitor economy is enough to pay the annual salaries of approximately 782 police officers.

$48M LOCAL TAXES

The $48 million in local taxes generated by Overland Park's visitor economy is enough to pay for 916 additional police cars.

$48M LOCAL TAXES

The $48 million in local taxes generated by Overland Park's visitor economy is enough to pay for 24 lane miles of brand-new pavement in Overland Park.

$48M LOCAL TAXES

The $48 million is enough to repair 2,290 lane miles with chip seal. This enough to repair approximately every single road in Overland Park (2,000+ lane miles).

Spending per Visitor

Visitors to Overland Park spent approximately $190 per visitor in 2024. This translates to nearly 5.1 million visitors, a 3.7% increase in visitor volume and a 1.1% increase in per-person spending versus 2023. Average spending by each overnight visitor to Overland Park was $268 in 2024, while day visitors spent $120 on average.

Visitor vs Local Demand: Restaurant Sales

Visitors to Overland Park spent $265 million on food and beverage in 2024. Discounting spending in grocery stores, visitors spent $212 million; this accounts for approximately 36% of all restaurant spending in Overland Park.

Overland Park Restaurant Sales Share by Segment
Percent of total restaurant spending in Overland Park

Visitor 36%

Local 64%
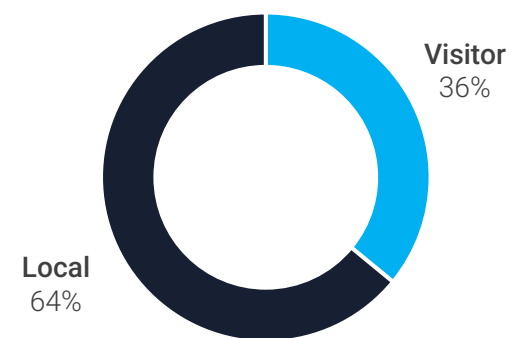
Source: Tourism Economics

Appendix

Glossary – Spending Definitions

Term	Description
Lodging	All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitors spending within the arts, entertainment and recreation sector.
Retail	Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.
Local transport	Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.
Second homes	Where applicable, spending associated with 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) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.
Employment	Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
Labor income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	Business sales net of intermediate (supply chain) purchases.
Local Taxes	City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.
State Taxes	State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become 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.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs more than 600 full-time staff, including 350+ professional economists and analysts. 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.

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For more information, questions on the report or other general inquiries, please reach out to the team at **admin@tourismeconomics.com**.