

2024

Economic Impact of Visitors in Osage County, Kansas



CONTENTS

Introduction

Key Findings

Visitor Indicator Trends

Visitor Spending

Economic Impact Methodology

Economic Impact

Appendix



Introduction

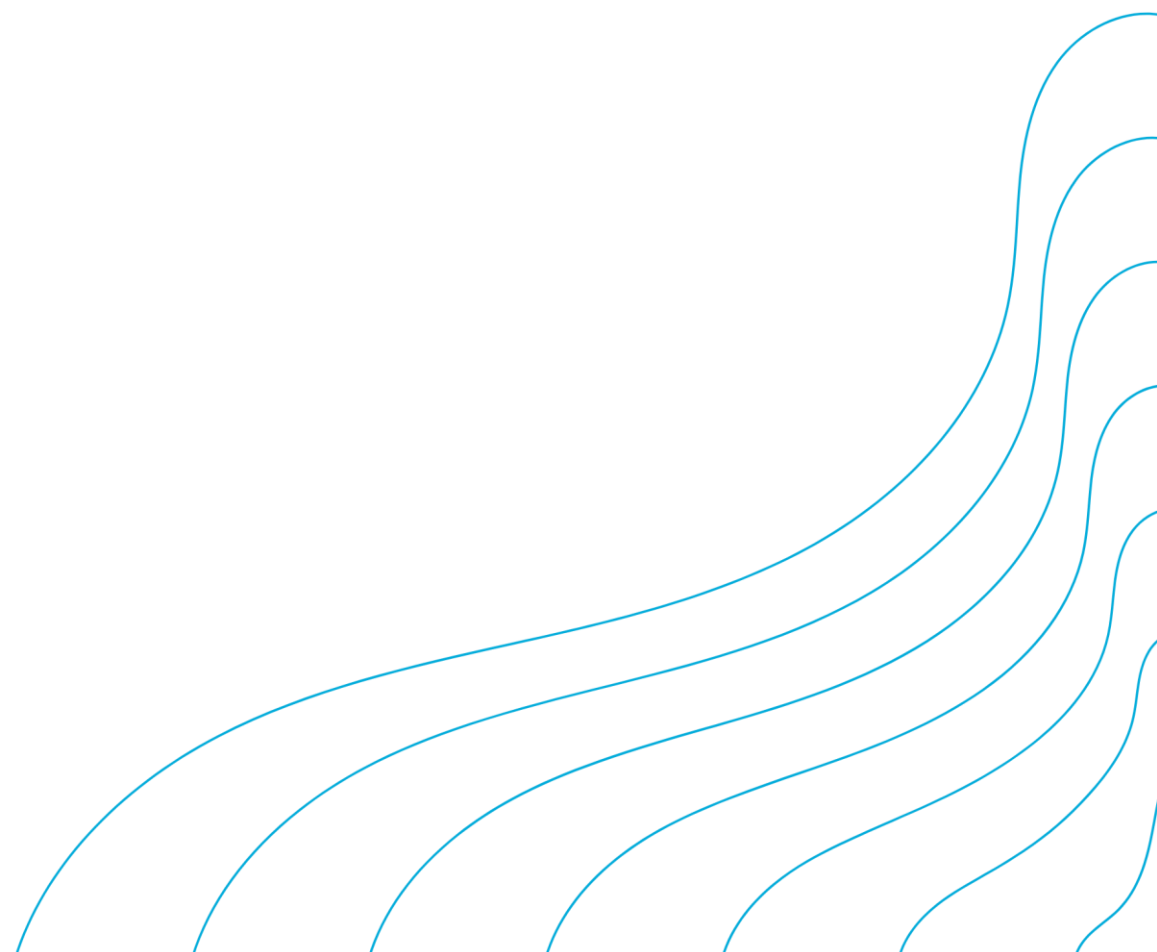
Visitors are integral to Osage County's economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of Osage County's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

KEY FINDINGS



Key Findings

Visitors Generate Significant Economic Impact

Osage County visitor spending tallied \$11.3 million in 2024, with total jobs registering 129 and state and local taxes totaling \$1.5 million.



\$11.3M VISITOR SPENDING



\$3.4M TOTAL PERSONAL INCOME



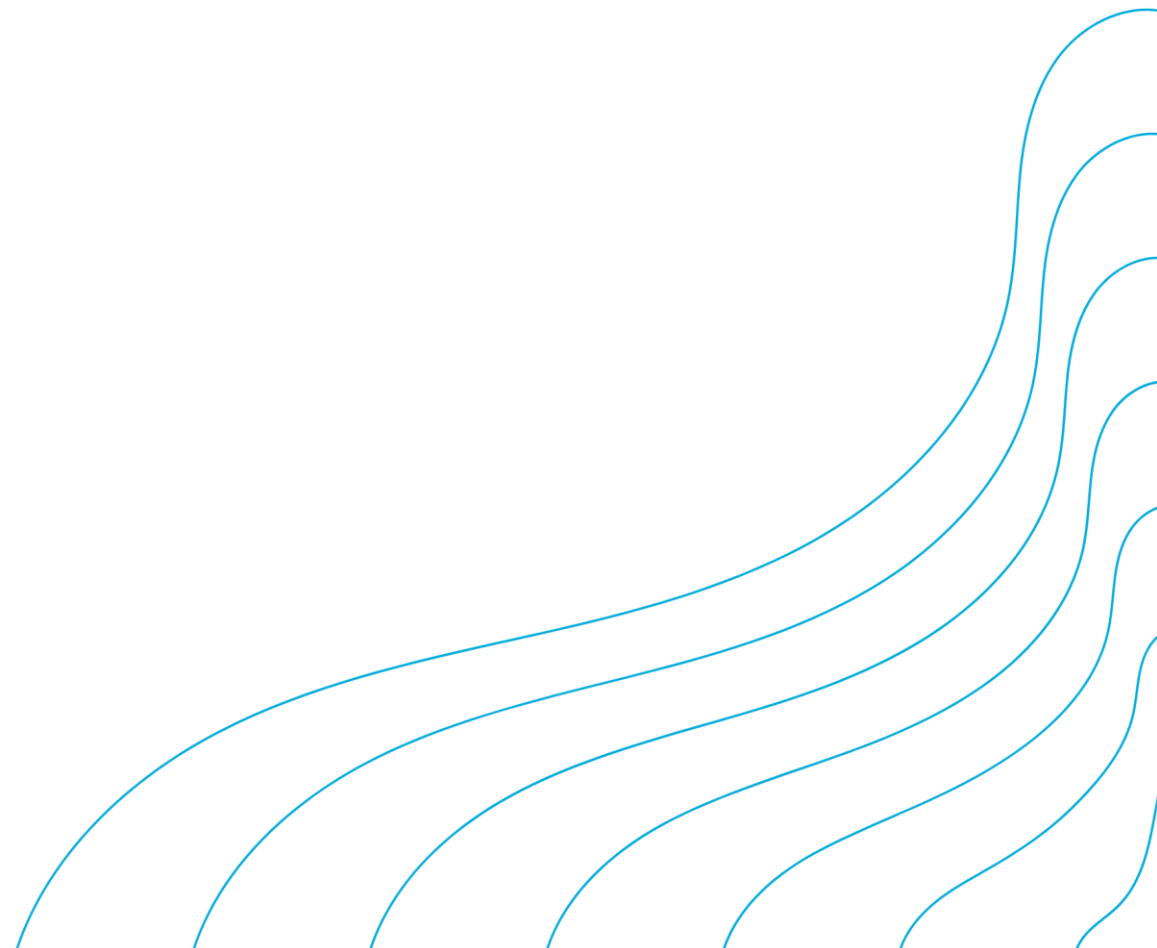
129 TOTAL JOBS SUPPORTED



\$1.5M STATE AND LOCAL TAXES



VISITOR INDICATOR TRENDS



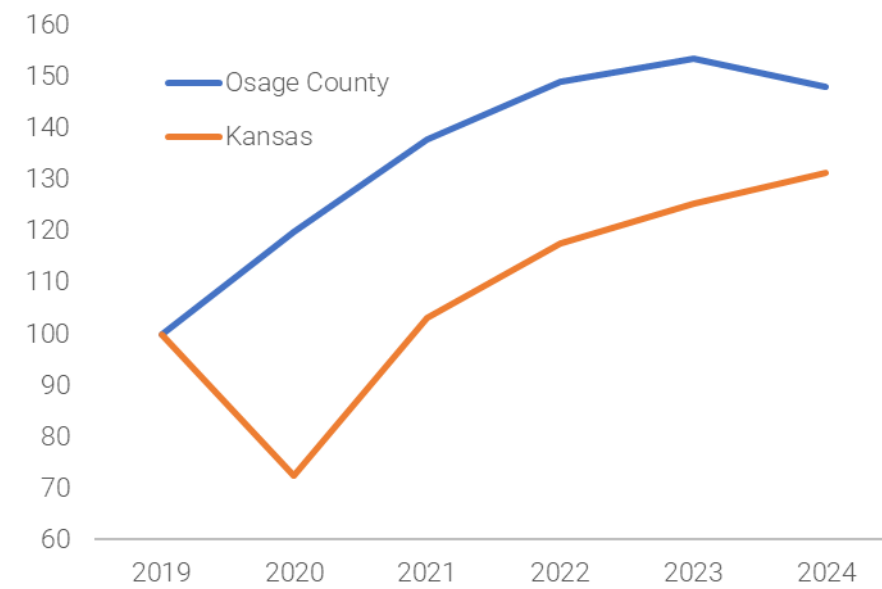
Visitor Indicator Trends

Recreation sales tax collections in Osage County fell to \$70 thousand in 2024, a decline of 3.7%. By comparison, Kansas saw a 4.7% increase in recreation taxes.

Sales tax collections from food & beverage businesses in 2024 totaled \$520 thousand, a year-over-year decrease of 5.4% while Kansas grew 2.2%.

Taxable Recreation Sales

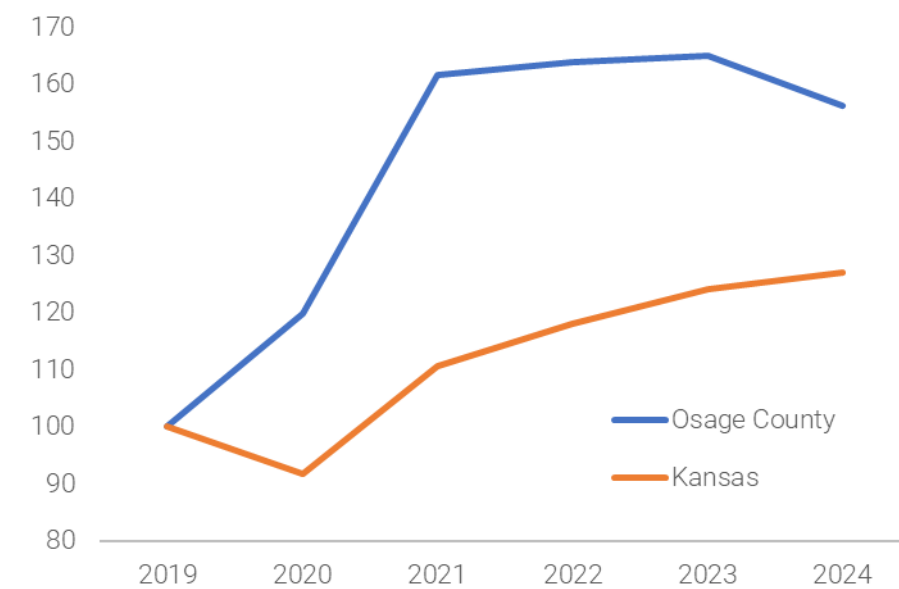
Indexed 2019 = 100



Source: Kansas Department of Revenue

Taxable Food and Beverage Sales

Indexed 2019 = 100



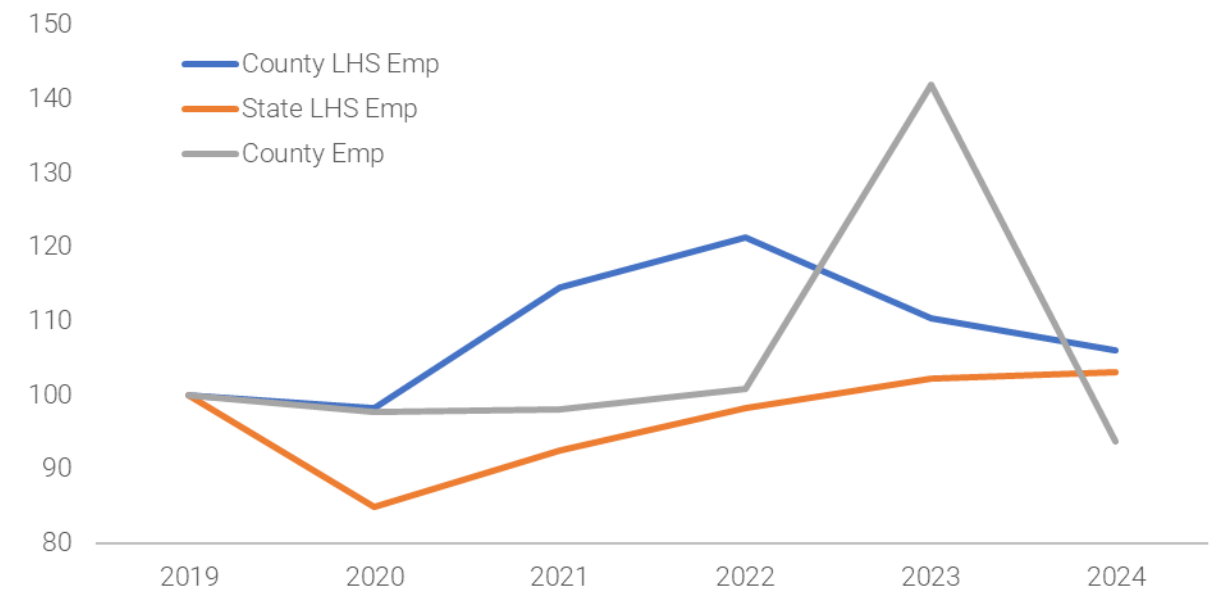
Source: Kansas Department of Revenue

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

Employment in Osage County's leisure and hospitality industry (LHS) declined -3.9% in 2024, underperforming LHS employment at the state level (0.9%).

Employment Growth

Indexed 2019 = 100



Source: BLS

VISITOR SPENDING



Visitor Spending

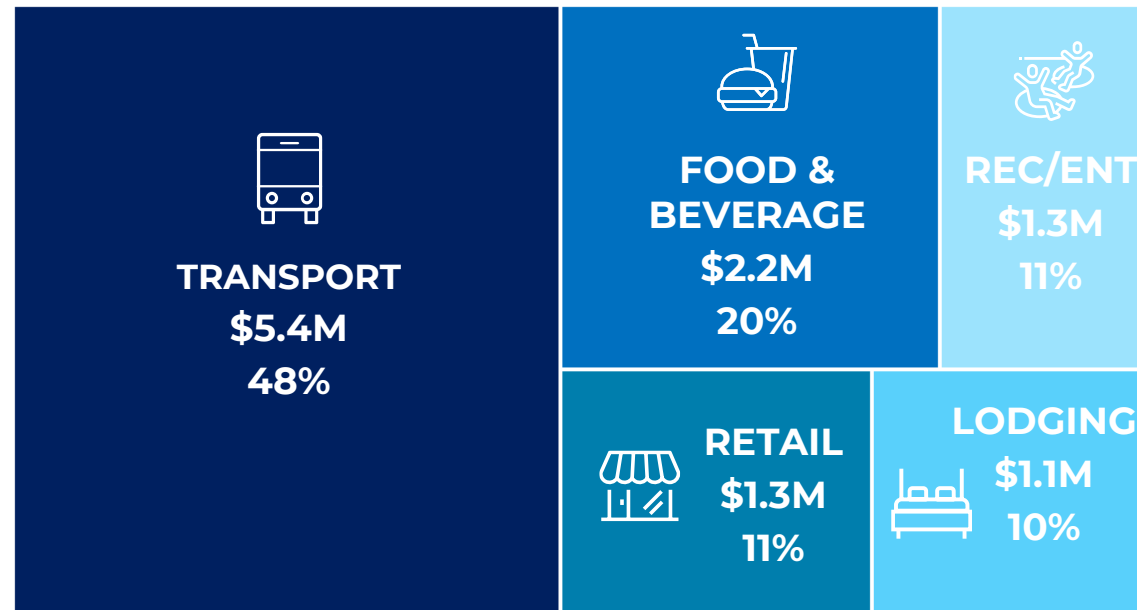
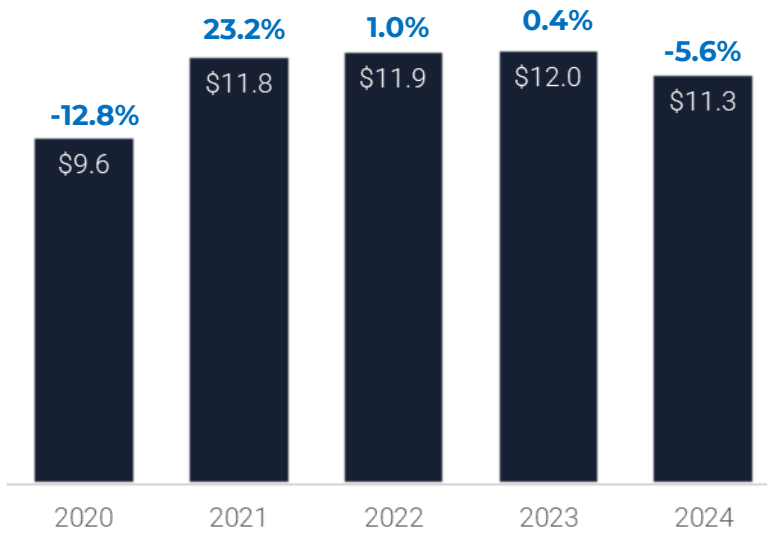
Visitor spending decreased 5.6% to \$11.3 million in 2024.

Of the \$11.3 million spent, transportation accounted for \$5.4 million—48% of all visitor spending.

Visitors spent 20% of their budget on food and beverage, or \$2.2 million in spending.

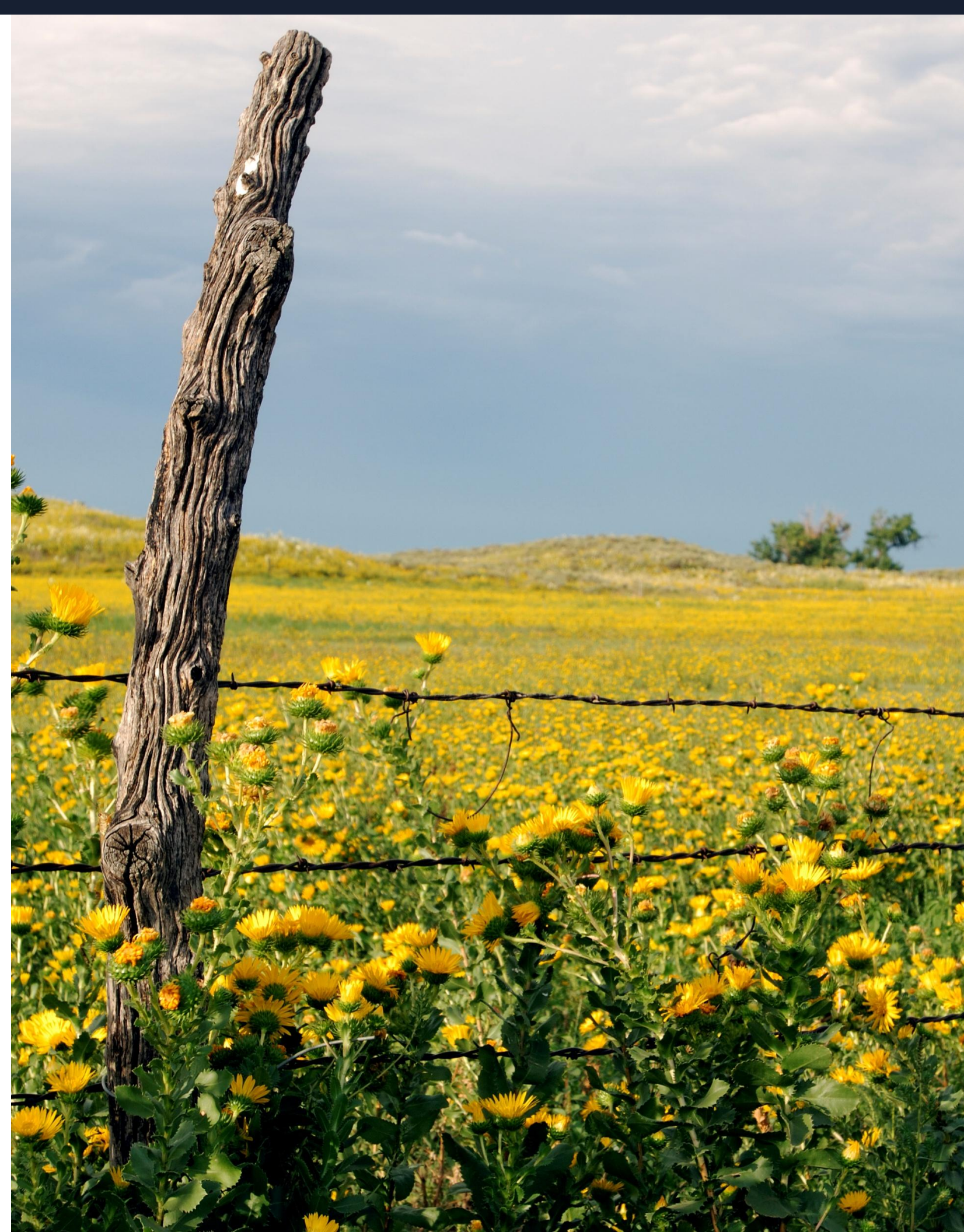
Osage County Visitor Spending

\$ millions



Source: Tourism Economics

Note: Lodging includes the value of second homes.



Visitor Volume and Spending Trends

Visitor spending decreased 5.6% in 2024, with declines concentrated in transportation (-7.3%), recreation (-5.3), and lodging (-5.3%).

However, visitor spending was buoyed by growth in retail spending, which expanded 0.1% year over year.

Osage County Visitor Spending

\$ millions

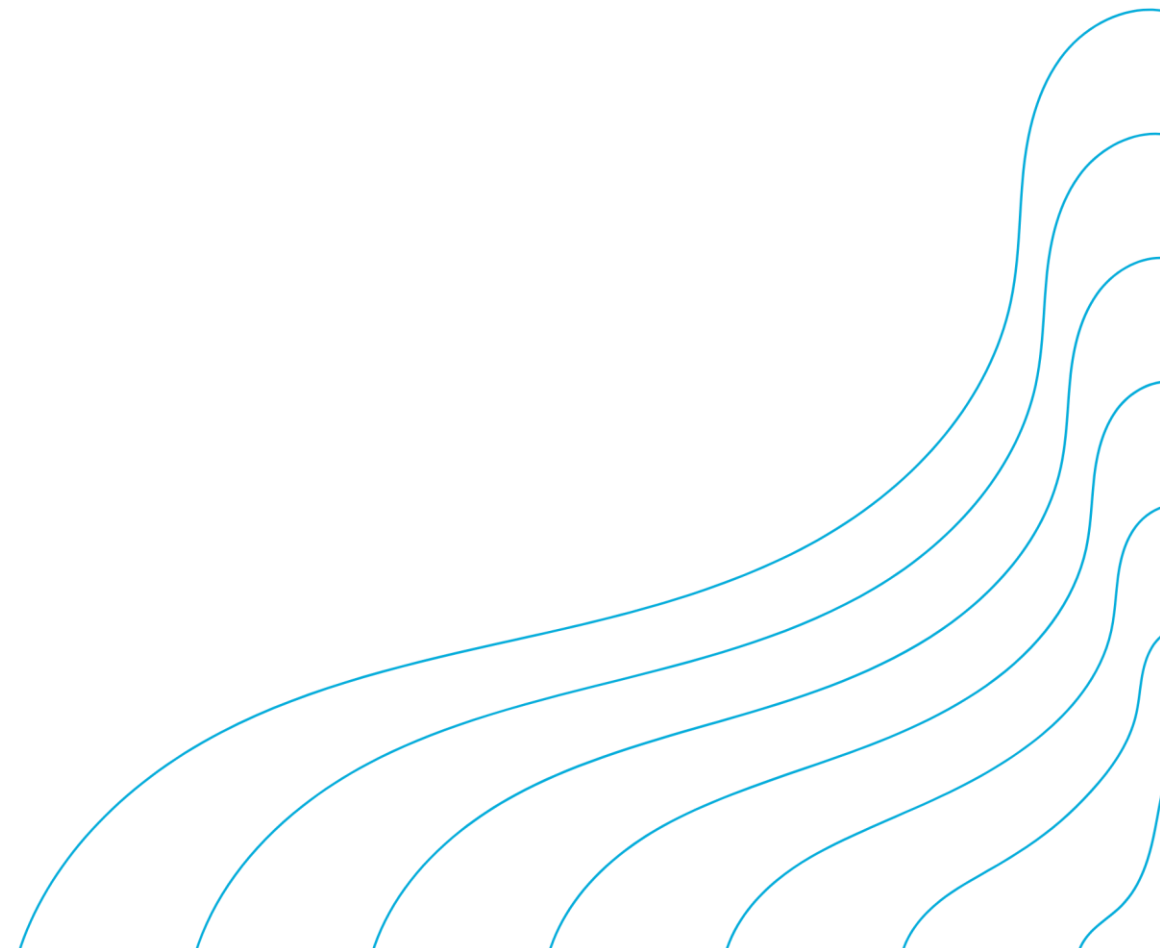
	2020	2021	2022	2023	2024	2024 Growth
Visitor spending	\$9.6	\$11.8	\$11.9	\$12.0	\$11.3	-5.6%
Transportation	\$5.3	\$5.7	\$5.8	\$5.8	\$5.4	-7.3%
Food & beverage	\$1.6	\$2.4	\$2.3	\$2.3	\$2.2	-4.5%
Recreation	\$0.9	\$1.2	\$1.3	\$1.3	\$1.3	-5.3%
Retail	\$0.9	\$1.2	\$1.2	\$1.2	\$1.3	0.1%
Lodging	\$0.8	\$1.3	\$1.2	\$1.2	\$1.1	-5.3%

Source: Tourism Economics

Note: Lodging includes the value of second homes.



ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

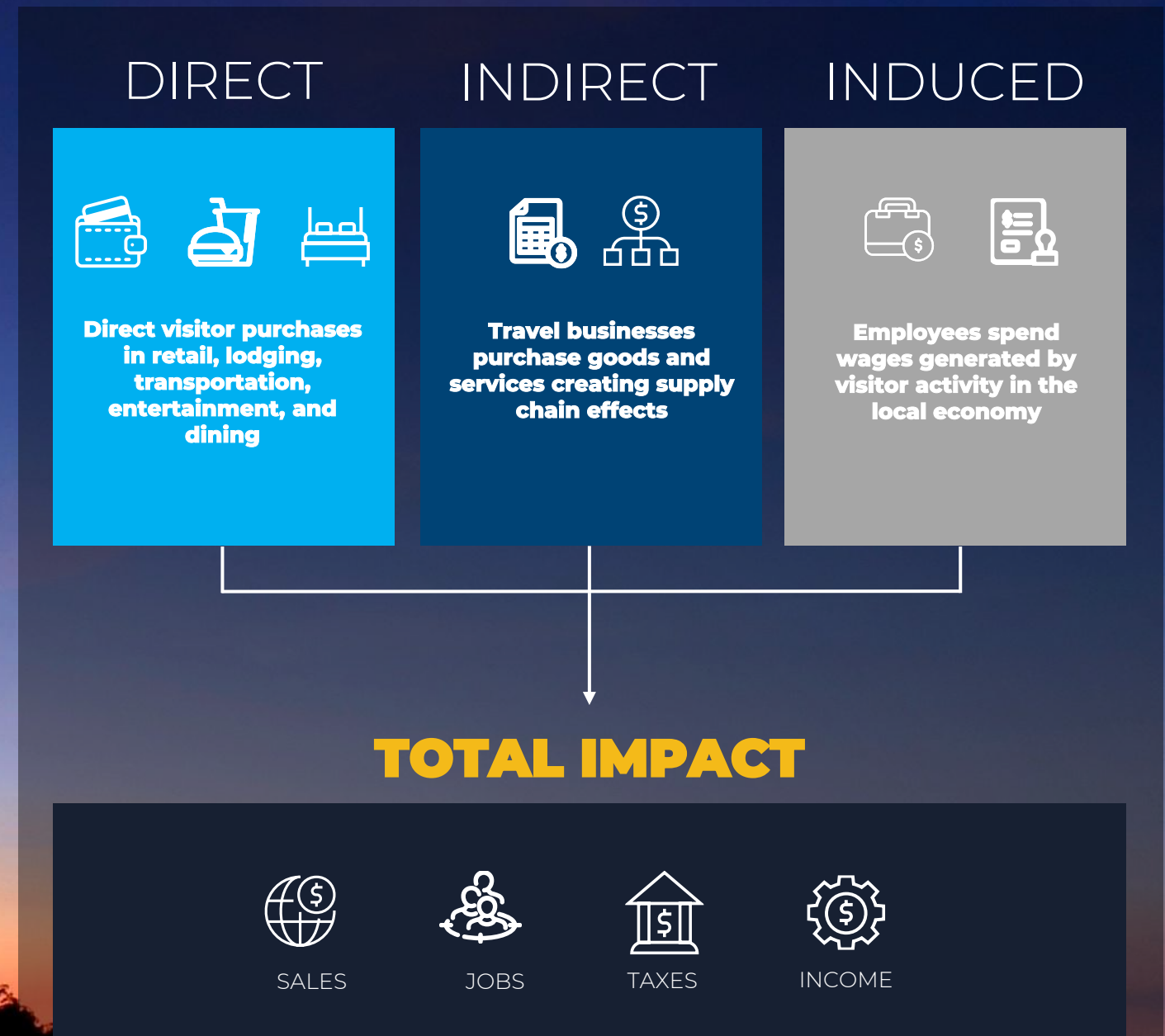
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitors through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

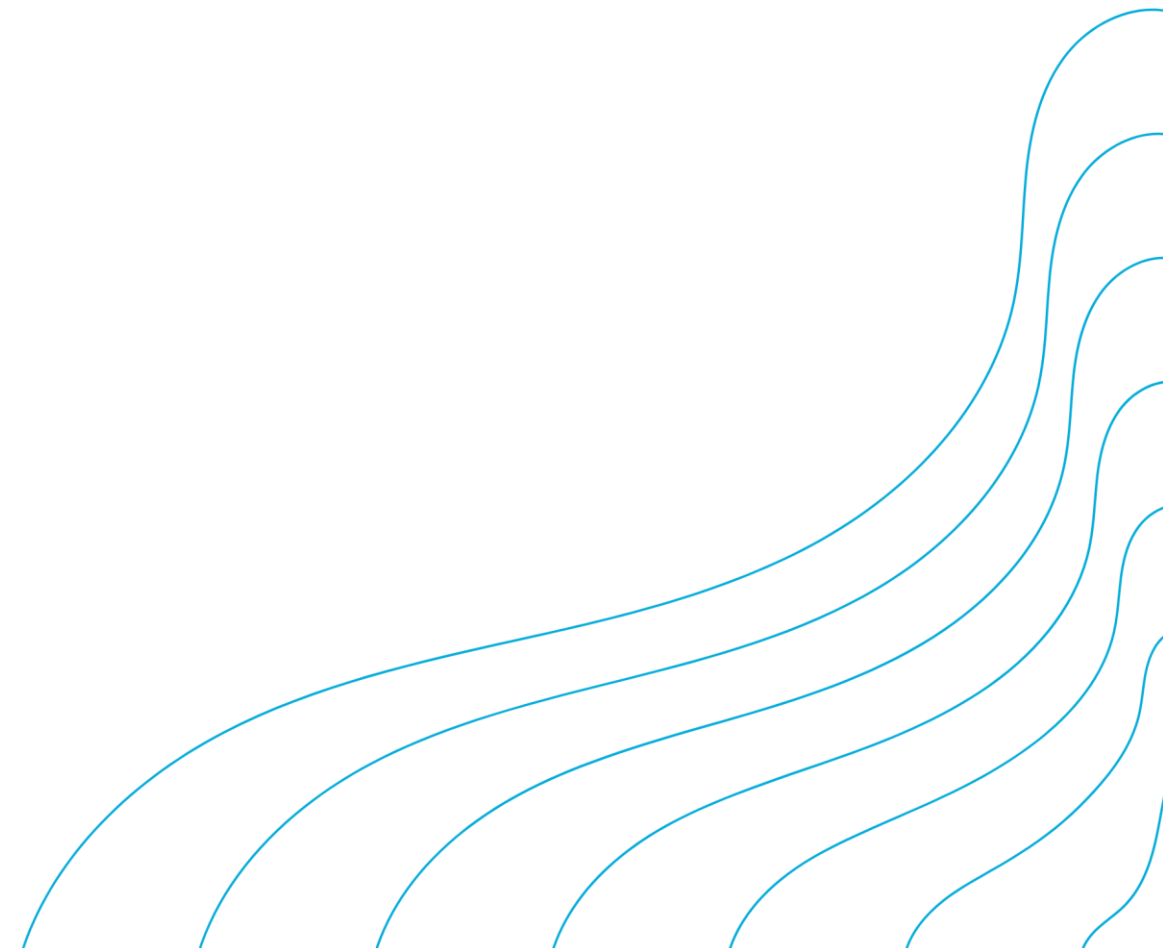
The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

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

Economic Impact Model



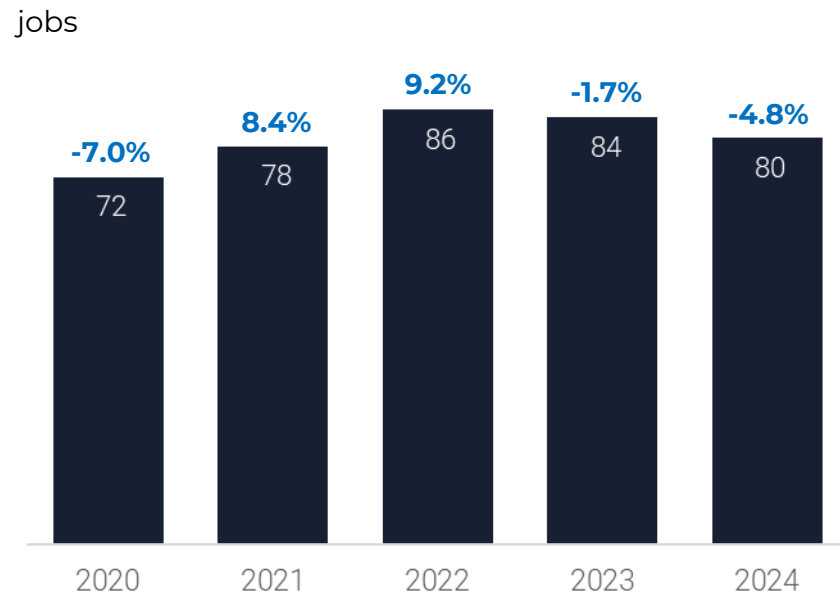
ECONOMIC IMPACT



Direct Employment

Employment directly supported by visitor activity decreased 4.8% in 2024, falling to 80 jobs. 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 11th in the county against other industries.

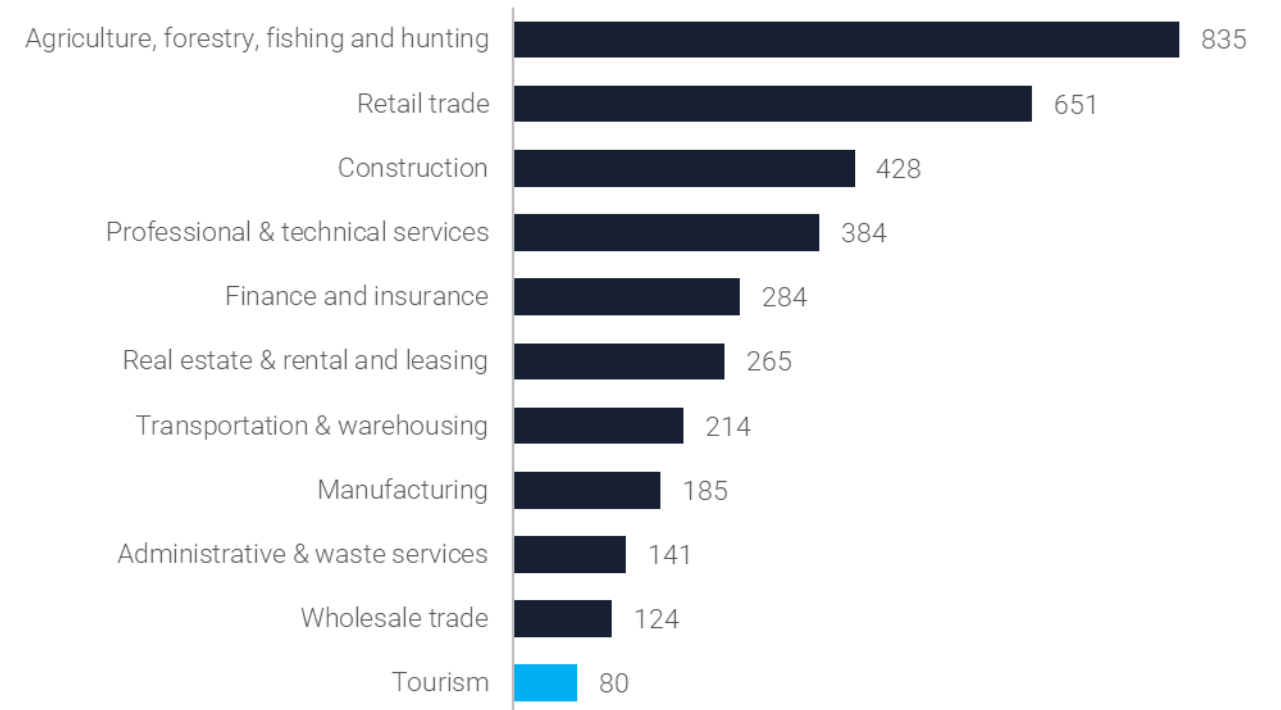
Visitor-Supported Employment in Osage County



Source: Tourism Economics

Employment in Osage County, by Major Industry

jobs

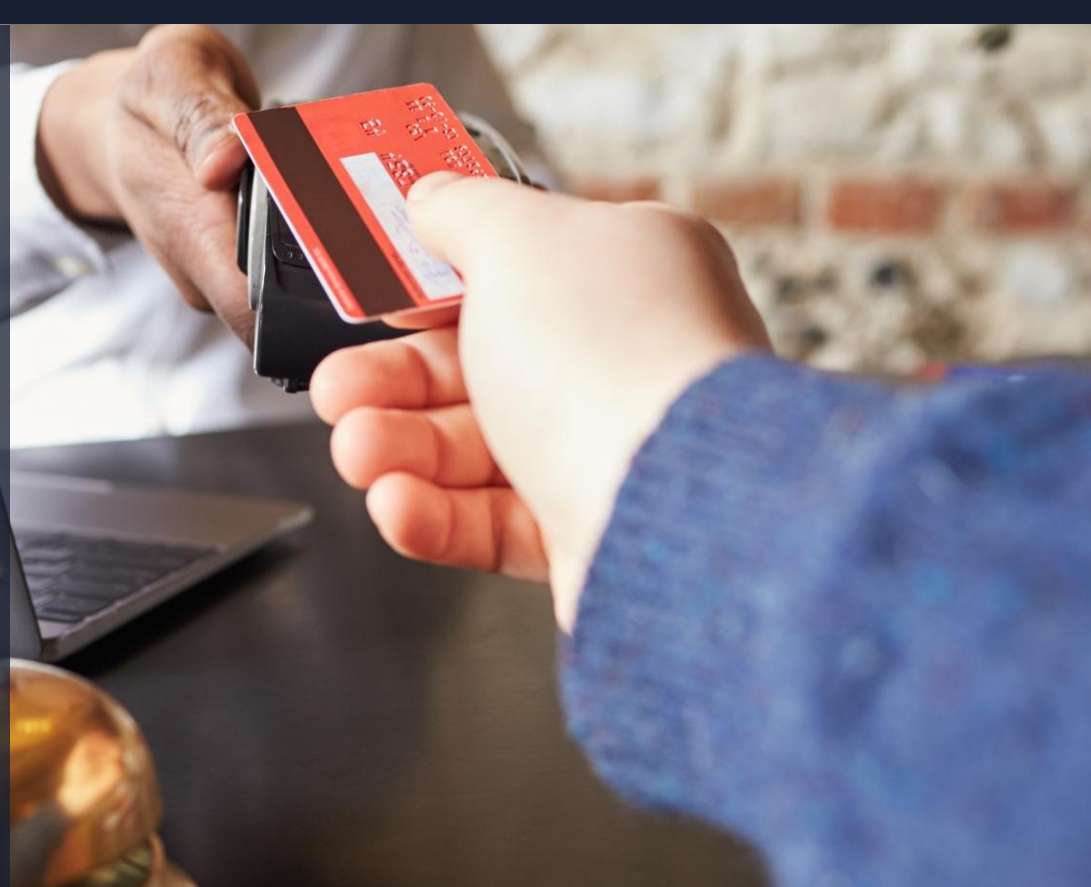


Sources: BEA, BLS, Tourism Economics

Visitor activity in Osage County directly supported nearly **100 local jobs**.



Visitors supported 2.6% of all jobs in Osage County.

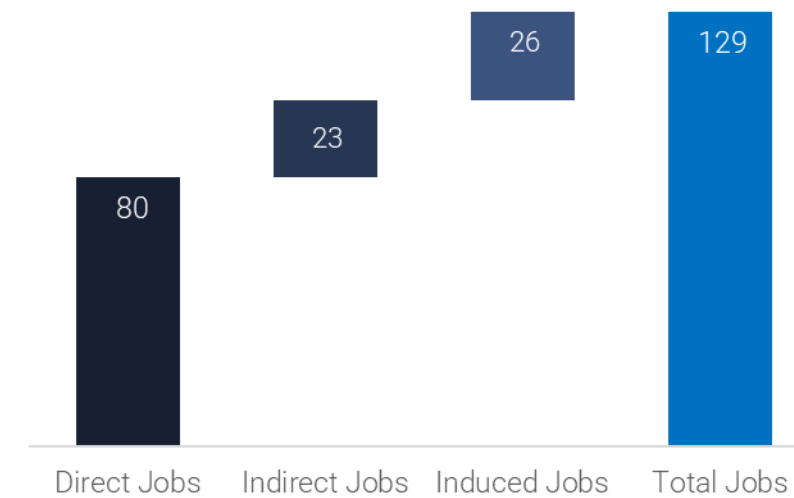


Visitor activity in Osage County directly supported 80 jobs within the county. When including indirect and induced impacts, total employment registered 129 jobs, or 2.6% of all jobs in Osage County.

Total labor income associated with this level of employment reached \$3.4 million in 2024.

Summary Employment Impacts (2024)

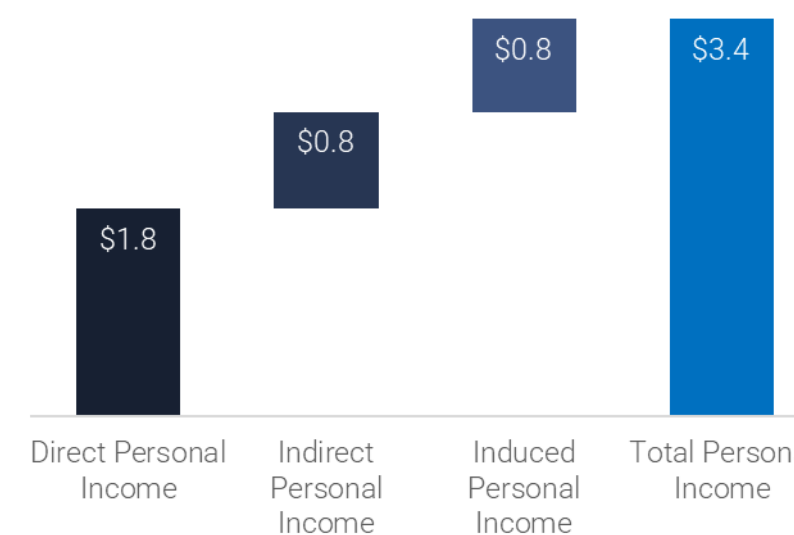
jobs



Source: Tourism Economics

Summary Personal Income Impacts (2024)

\$ millions



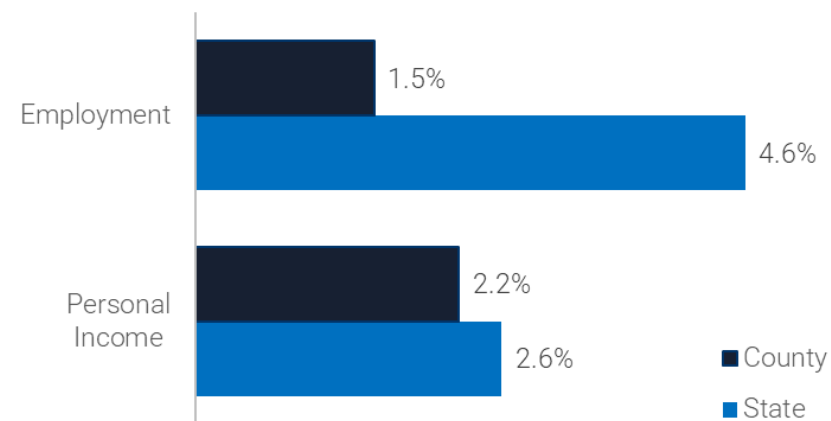
Source: Tourism Economics

Economic Impact Findings

Visitor activity supports a smaller share of direct jobs and personal income in Osage County than the statewide share, indicating a lesser reliance on tourism.

Direct Impact Shares (2024)

% share of total employment and wages



Sources: BLS, Tourism Economics

Economic Impact Findings

Osage County's \$11.3 million in visitor spending represented 0.14% of all visitor spending in Kansas. The share declined in 2024 as visitor spending growth for the state was stronger than the county.

Of all jobs directly supported by visitor activity in Kansas, 0.12% exist in Osage County.

Local employees whose jobs directly rely on visitor activity earned \$1.8 million in wages and other income.

Osage County Direct Impacts

\$ millions, jobs

	2020	2021	2022	2023	2024	2024 Growth
Visitor Spending						
Osage County	\$9.6	\$11.8	\$11.9	\$12.0	\$11.3	-5.6%
Kansas	\$5,445.7	\$6,960.3	\$7,676.8	\$8,029.2	\$8,189.1	2.0%
Share	0.18%	0.17%	0.16%	0.15%	0.14%	
Employment						
Osage County	72	78	86	84	80	-4.8%
Kansas	53,084	57,051	63,685	65,524	65,983	0.7%
Share	0.14%	0.14%	0.13%	0.13%	0.12%	
Personal Income						
Osage County	\$1.4	\$1.8	\$1.9	\$1.9	\$1.8	-7.7%
Kansas	\$1,516.6	\$1,721.5	\$2,095.0	\$2,234.4	\$2,296.8	2.8%
Share	0.10%	0.10%	0.09%	0.09%	0.08%	

Source: Tourism Economics

Visitors supported 129 total jobs in Osage County or 1-in-38 jobs.

Osage County job holders supported by visitor activity earned \$3.4 million in wages and benefits from their work.

Visitors supported \$1.5 million in state and local governmental revenues in 2024.

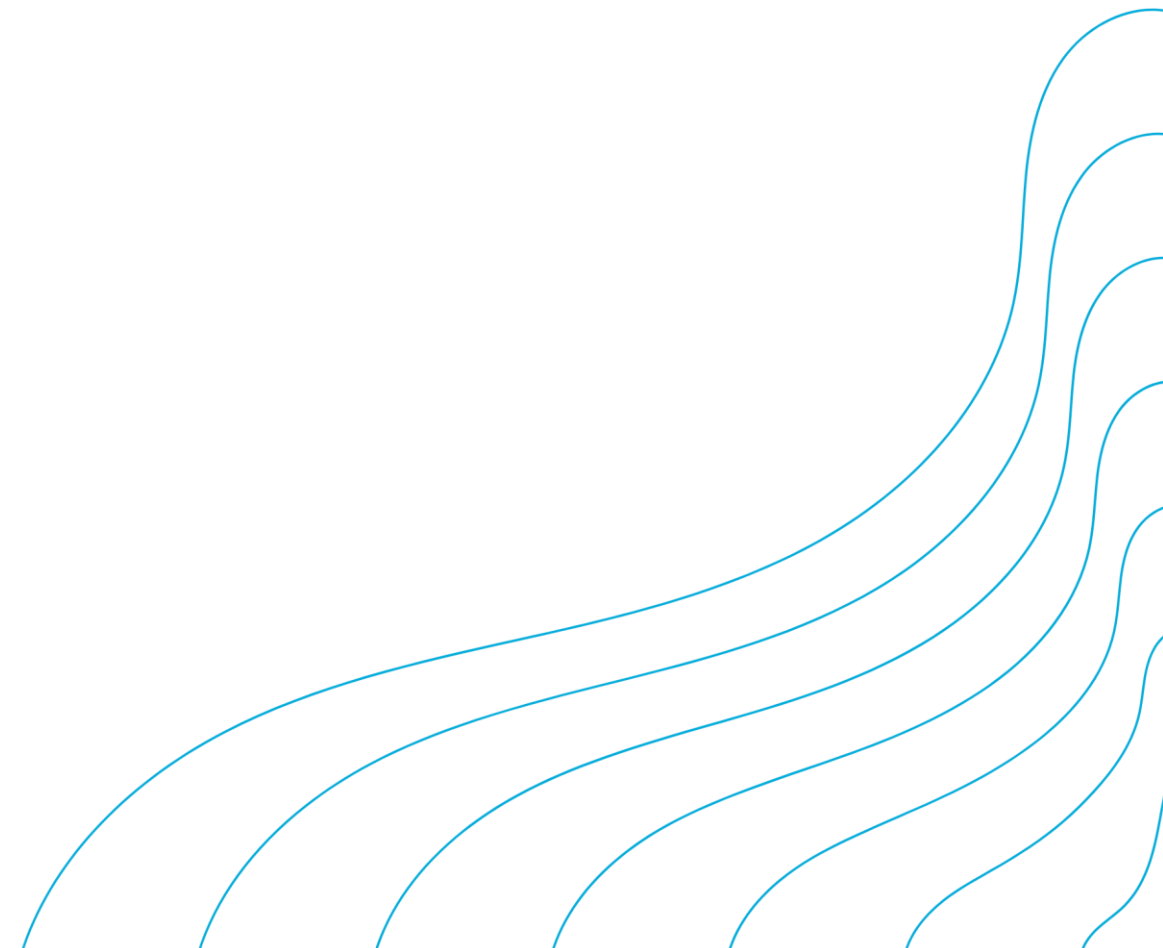
Osage County Total Impacts

\$ millions, jobs

	2020	2021	2022	2023	2024	2024 Growth
Employment						
Osage County	106	115	141	139	129	-6.6%
Kansas	80,152	84,431	88,509	90,923	91,562	0.7%
Share	0.13%	0.14%	0.16%	0.15%	0.14%	
Personal Income						
Osage County	\$2.4	\$2.8	\$3.7	\$3.7	\$3.4	-6.6%
Kansas	\$2,821.7	\$3,112.2	\$3,388.5	\$3,602.6	\$3,704.1	2.8%
Share	0.08%	0.09%	0.11%	0.10%	0.09%	
State & Local Taxes						
Osage County	\$0.9	\$1.0	\$1.5	\$1.6	\$1.5	-1.9%
Kansas	\$589.3	\$700.5	\$776.8	\$822.9	\$843.0	2.4%
Share	0.15%	0.14%	0.20%	0.19%	0.18%	

Source: Tourism Economics

APPENDIX



Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as Osage County, Kansas.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations.

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

The complete set of data inputs is provided below.

Data Sources

- **Bureau of Economic Analysis and Bureau of Labor Statistics:** Employment and wage data, by industry
- **STR:** Lodging data, including room demand, room rates, occupancy, and room revenue for hotels
- **Kansas Department of Revenue:** Transient Guest Tax data and sales tax data by category for Osage County
- **Tourism Economics:** Economic Impact of Visitors in Kansas – State and County Analysis for calendar year 2024

Glossary

SPENDING DEFINITIONS	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 & 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.
	AIR TRANSPORT	Where applicable, the local share of air transportation spending.
ECONOMIC IMPACT DEFINITIONS	SECOND HOMES	Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.
	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.
	PERSONAL INCOME	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
	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

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics 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 was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling 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.

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.



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

For more information: admin@tourismeconomics.com.