

2025

Economic Impact of Visitors to Overland Park, KS

Conducted by:



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Introduction

Visitors are integral to the Overland Park 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.

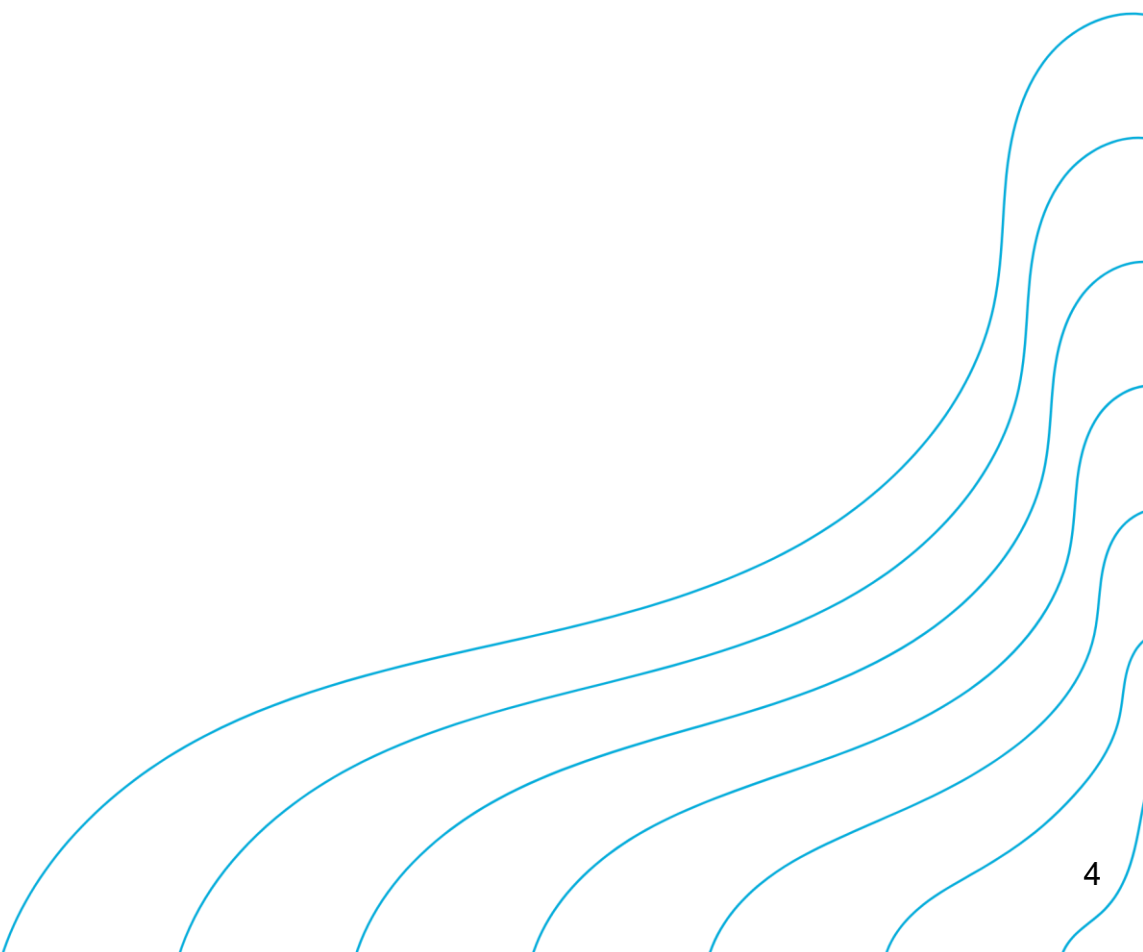
To quantify the significance of Overland Park's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

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

Data Sources

- **STR and AirDNA:** Lodging performance data, including room demand and revenue, for hotels and short-term rentals
- **Kansas Department of Revenue:** Transient guest tax and sales tax data by industry for Johnson County and its cities
- **BEA/BLS:** Employment, wage and consumer price index data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory

ECONOMIC IMPACT METHODOLOGY



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.

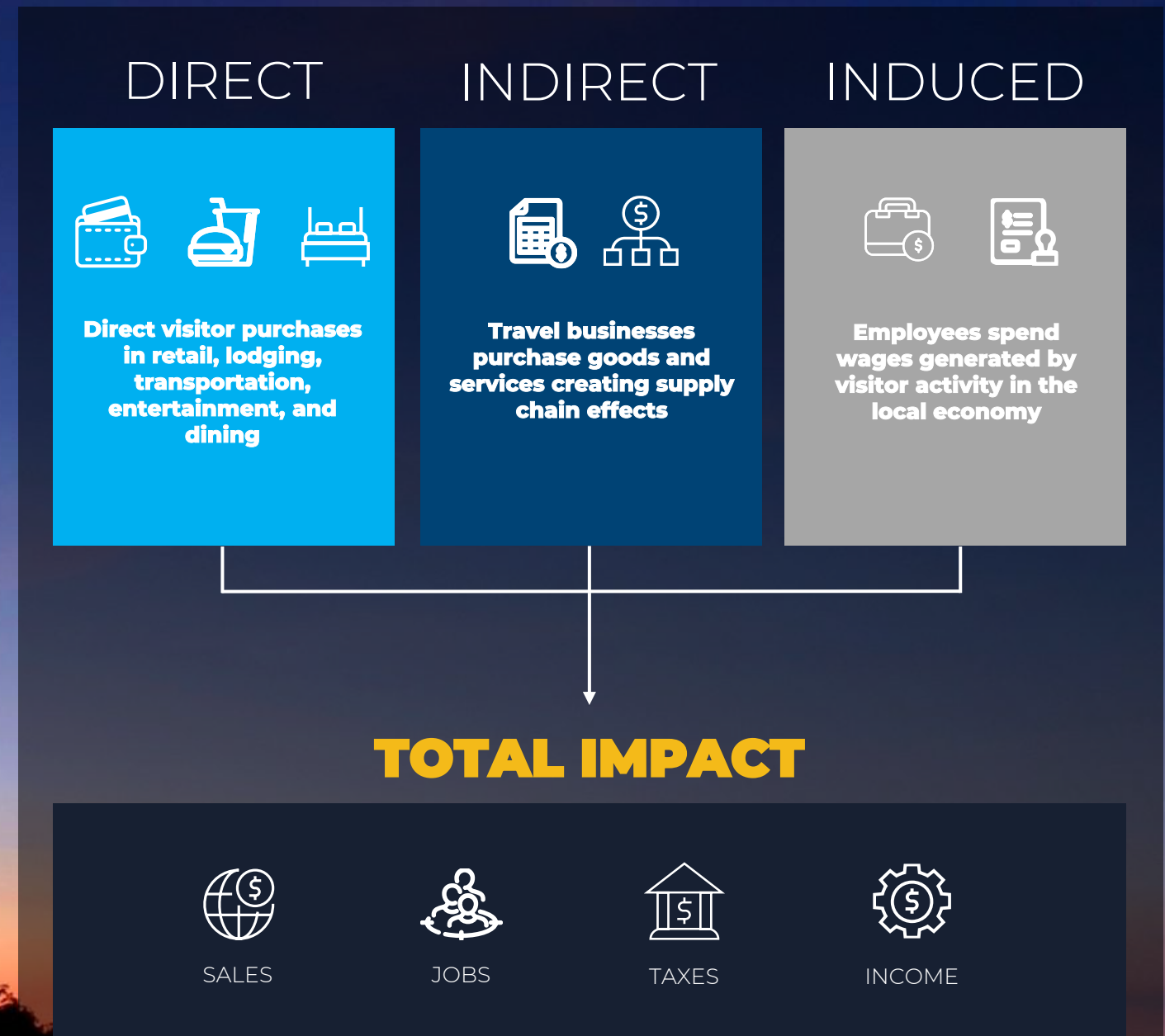
The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, GDP, 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

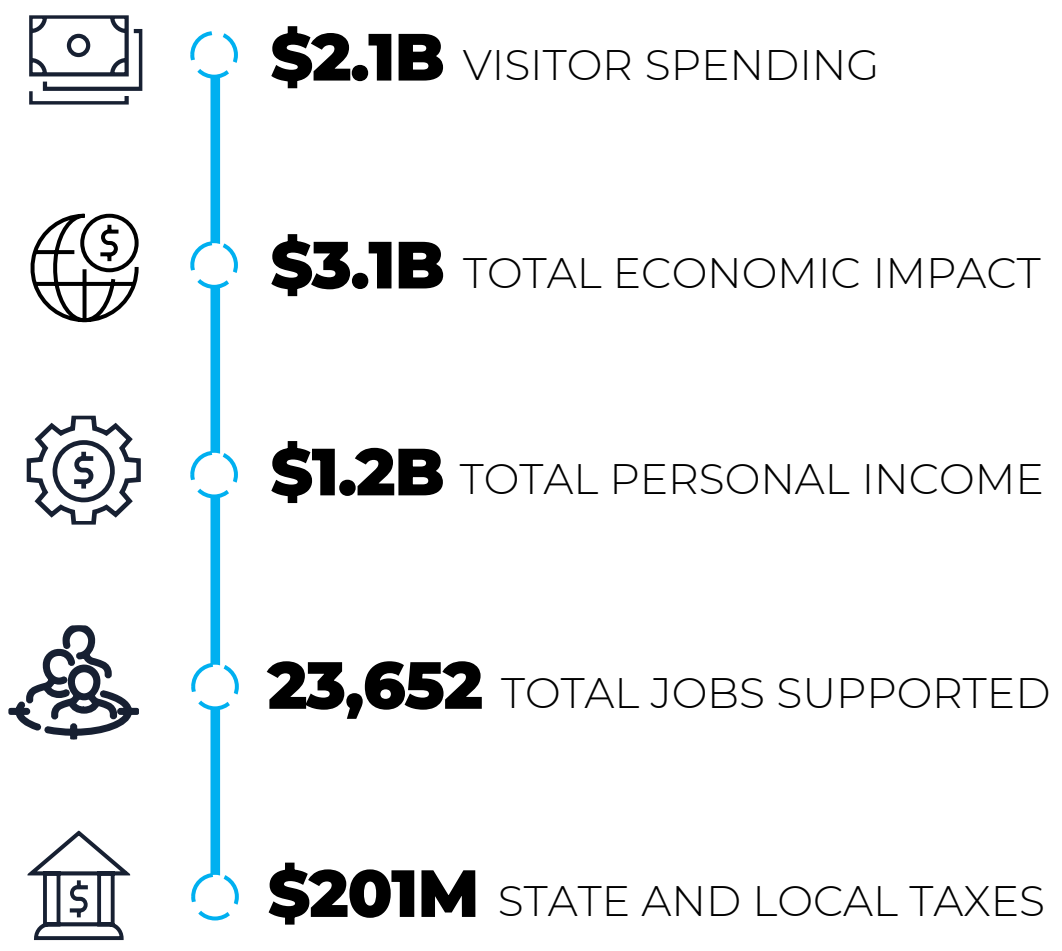


KEY FINDINGS



Johnson County Key Findings

In 2025, visitors to Johnson County spent \$2.1 billion, generating a total economic impact of \$3.1 billion.



Overland Park Key Findings

In 2025, visitors to Overland Park spent **\$1.0 billion**, generating a total economic impact of **\$1.6 billion**.



\$1.0B VISITOR SPENDING



\$1.6B TOTAL ECONOMIC IMPACT



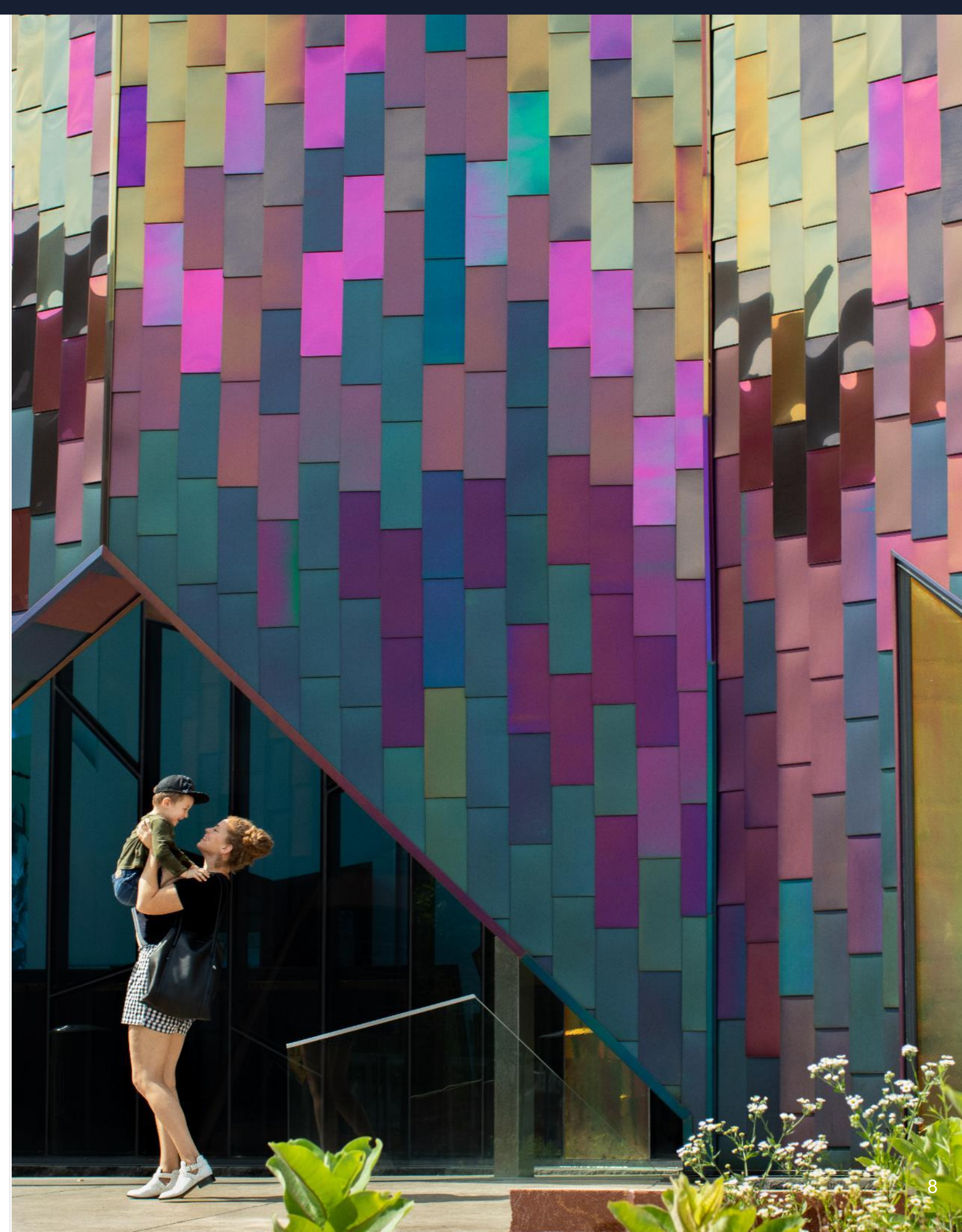
\$523M TOTAL PERSONAL INCOME



11,182 TOTAL JOBS SUPPORTED



\$108M STATE AND LOCAL TAXES



VISITOR SPENDING



Visitors to Overland Park spent \$1.0 billion in 2025.

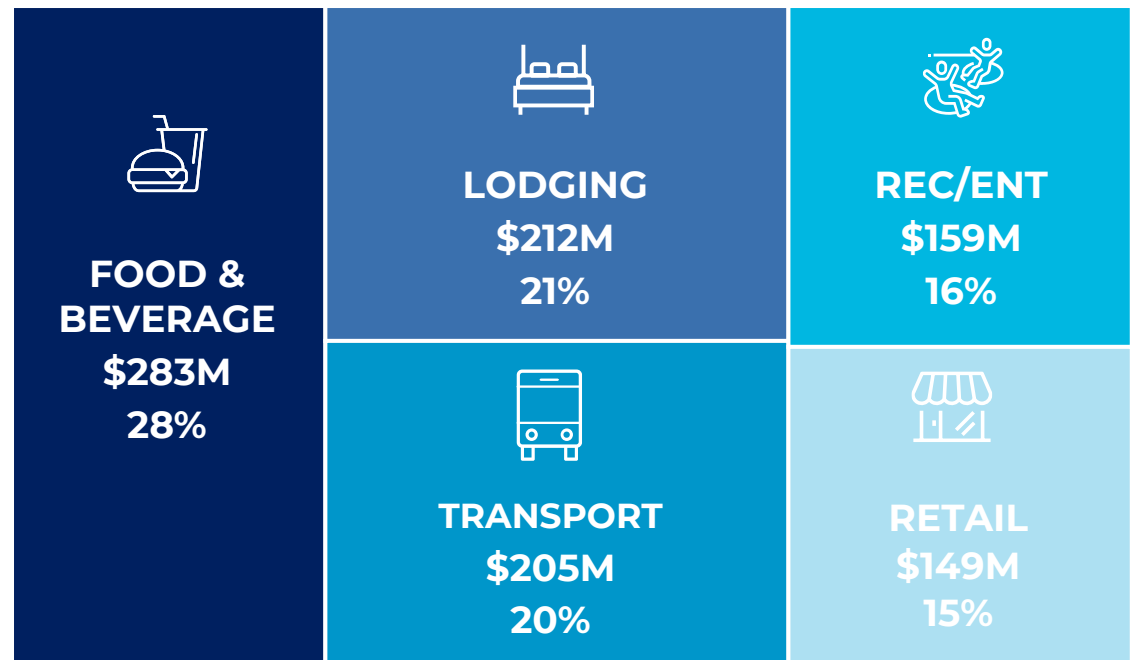
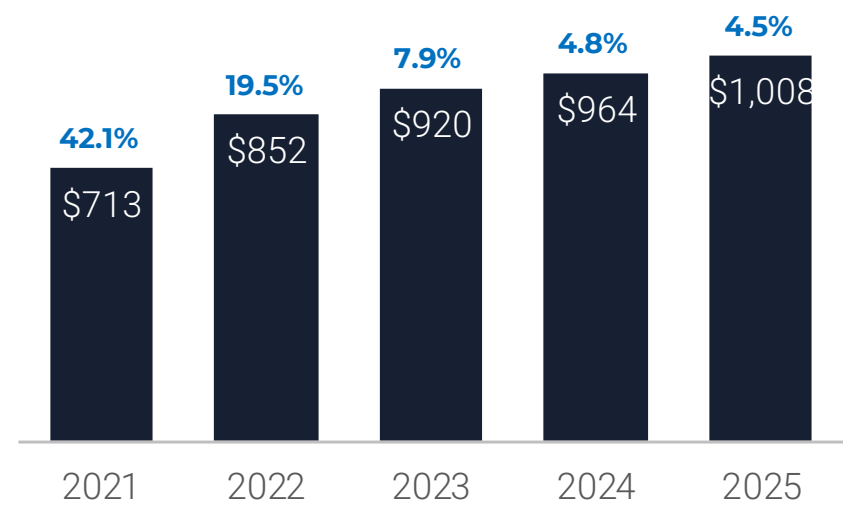


Of the \$1.0 billion spent, food and beverage accounted for \$283 million—28% of visitor spending.

Spending on lodging, including short-term rentals and the value of second homes, represented 21% of all visitor spending in 2025.

Overland Park Visitor Spending

\$ millions



Source: Tourism Economics

Note: Lodging includes all accommodation types.

Visitor Spending

In 2025, visitor spending in Overland Park grew 4.5% year-over-year, topping \$1.0 billion.

By spending category, recreation increased fastest at 7.8% year-over-year. Spending on food and beverage, and lodging, including short-term rentals and the value of second homes, both increased 6.9%.

Retail spending increased 3.6%, while transportation declined 2.2% due in part to lower gas prices.

Overland Park Visitor Spending

\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	\$713	\$852	\$920	\$964	\$1,008	4.5%
Food & beverage	\$197	\$225	\$249	\$265	\$283	6.9%
Lodging	\$132	\$163	\$183	\$198	\$212	6.9%
Transportation	\$172	\$207	\$208	\$210	\$205	-2.2%
Recreation	\$101	\$127	\$141	\$148	\$159	7.8%
Retail	\$112	\$131	\$138	\$144	\$149	3.6%

Source: Tourism Economics

Note: Lodging includes all accommodation types.

Visitor Spending Segments

In 2025, spending by overnight visitors grew 5.0%, outpacing the 3.6% increase in spending by day visitors. Overnight visitor spending of \$678 million accounted for two-thirds of all spending in Overland Park, of which lodging represented the largest share of overnight visitor spending at 31.2%. Day visitor spending of \$330 million represented the remaining one-third of total visitor spending, with transportation accounting for the largest share at 31%.

Overland Park Visitor Spending, by Segment

\$ millions

	2021	2022	2023	2024	2025	2025 Growth	2025 Share
Overnight visitor spend	\$456	\$560	\$610	\$646	\$678	5.0%	100.0%
Lodging	\$132	\$163	\$183	\$198	\$212	6.9%	31.2%
Food & beverage	\$122	\$143	\$159	\$170	\$181	6.8%	26.7%
Transportation	\$83	\$103	\$104	\$105	\$103	-2.4%	15.1%
Recreation	\$64	\$83	\$93	\$98	\$105	7.7%	15.5%
Retail	\$55	\$67	\$72	\$75	\$78	3.0%	11.4%

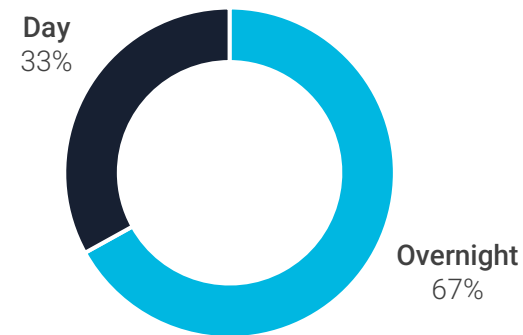
	2021	2022	2023	2024	2025	2025 Growth	2025 Share
Day visitor spend	\$257	\$292	\$309	\$319	\$330	3.6%	100.0%
Transportation	\$89	\$104	\$104	\$105	\$102	-2.1%	31.0%
Food & beverage	\$75	\$81	\$90	\$95	\$101	7.0%	30.7%
Retail	\$56	\$64	\$67	\$69	\$72	4.3%	21.8%
Recreation	\$37	\$44	\$49	\$50	\$55	8.1%	16.5%

Source: Tourism Economics

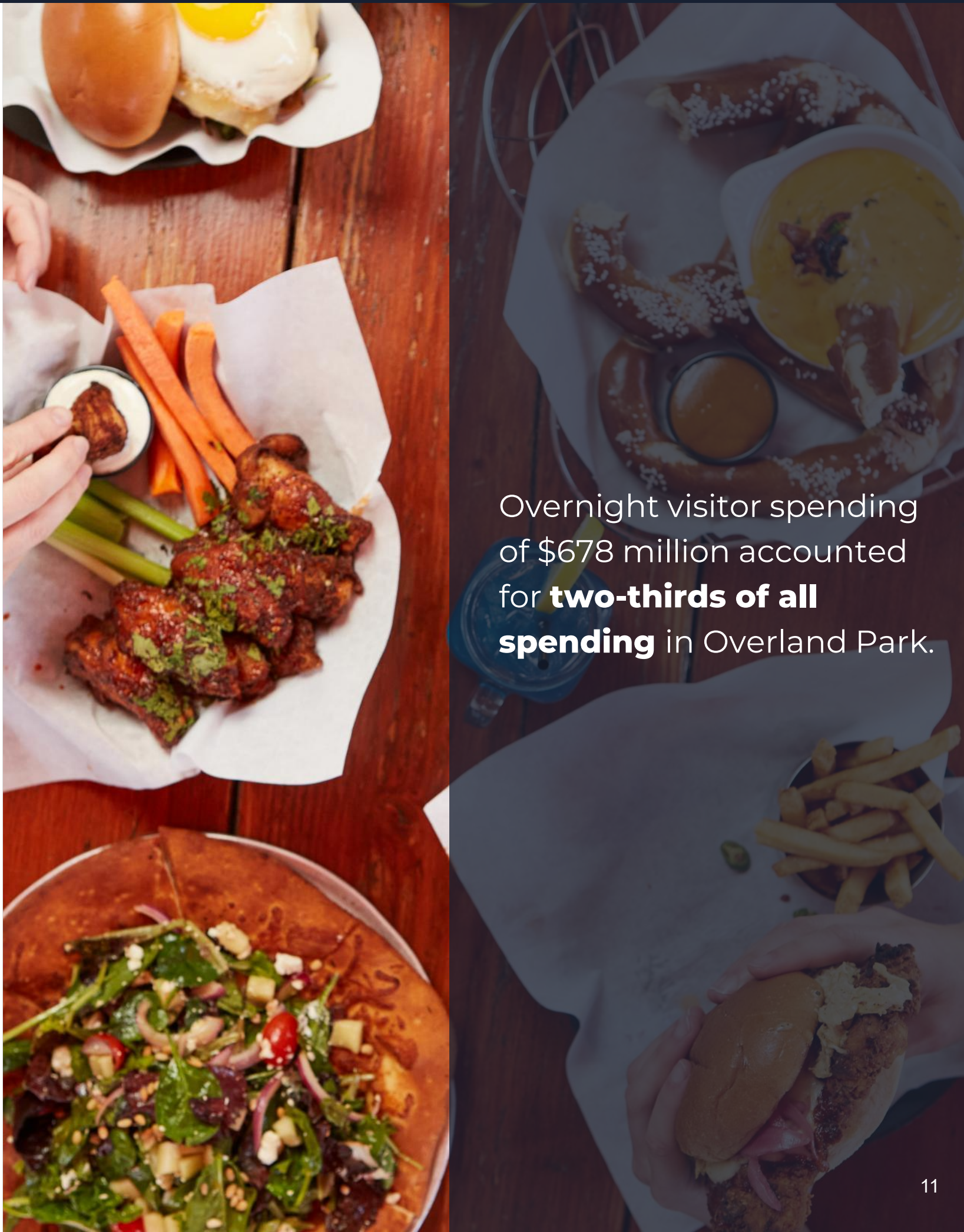
Note: Lodging includes all accommodation types.

Overland Park Visitor Spending Share, by Segment

% of total visitor spending



Source: Tourism Economics



Overnight visitor spending of \$678 million accounted for **two-thirds of all spending** in Overland Park.

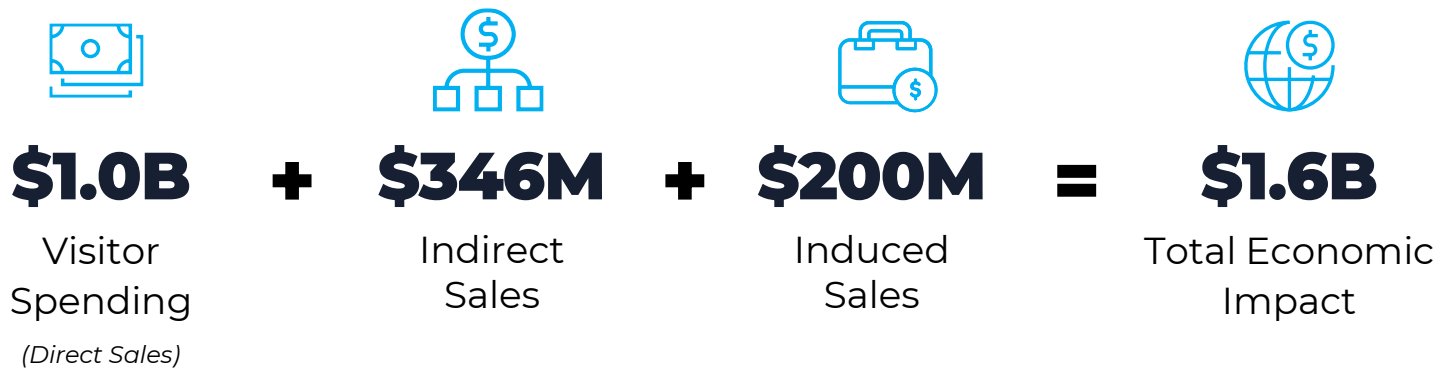
ECONOMIC IMPACT



Business Sales Impacts

Visitors spent \$1.0 billion in Overland Park in 2025. These direct impacts generated an additional \$545 million through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached \$1.6 billion in 2025.



Business Sales by Industry (2025)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$1,008	\$346	\$200	\$1,554
Food & Beverage	\$226	\$13	\$15	\$254
Retail Trade	\$206	\$3	\$16	\$225
Finance, Insurance and Real Estate	\$30	\$122	\$70	\$221
Lodging	\$210			\$210
Recreation and Entertainment	\$144	\$12	\$2	\$158
Gasoline Stations	\$145	\$0	\$1	\$146
Business Services		\$112	\$16	\$128
Education and Health Care		\$2	\$42	\$44
Other Transport	\$32	\$8	\$2	\$43
Communications		\$26	\$11	\$37
Personal Services	\$16	\$10	\$9	\$35
Wholesale Trade		\$19	\$10	\$29
Construction and Utilities		\$12	\$3	\$15
Government		\$4	\$1	\$5
Manufacturing		\$3	\$1	\$4
Agriculture, Fishing, Mining		\$0	\$0	\$0
Air Transport		\$0	\$0	\$0

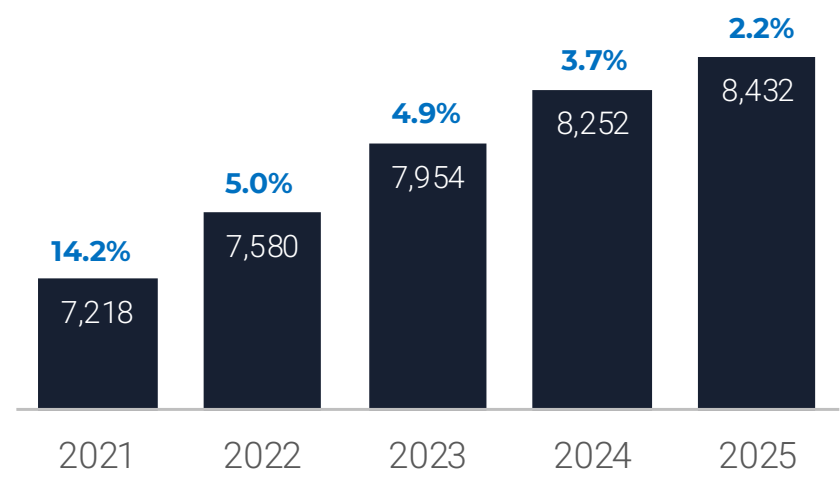
Source: Tourism Economics

Visitor spending generated a total economic impact of **\$1.6 billion**.

Direct Employment

Employment directly supported by visitor activity increased 2.2% in 2025, reaching 8,432 jobs.

Visitor-Supported Employment in Overland Park jobs



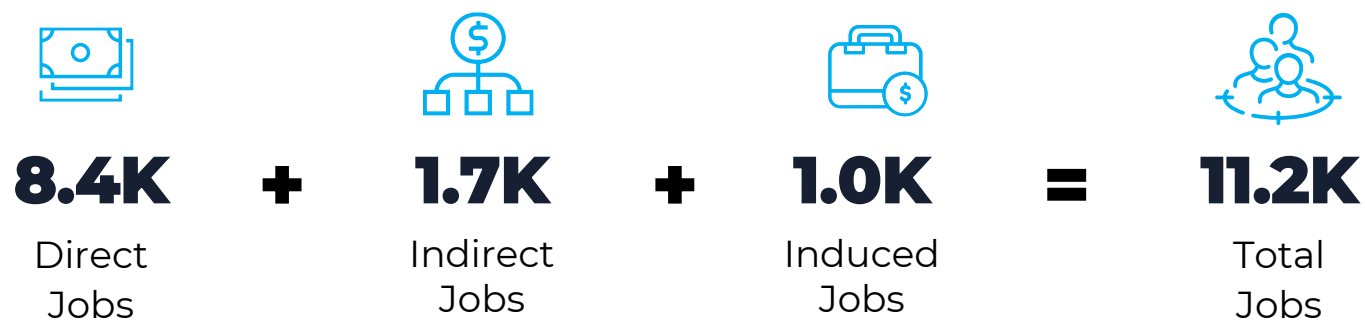
Source: Tourism Economics



The visitor economy in **Overland Park** directly supported **8,432 jobs**.

Employment Impacts

Visitor activity sustained 8,432 direct jobs in 2025, with an additional 2,751 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 11,182 in 2025, equating to 6.0% of all jobs in Overland Park.



Employment by Industry (2025)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	8,432	1,712	1,039	11,182
Food & Beverage	3,269	151	129	3,549
Recreation and Entertainment	2,208	165	25	2,397
Lodging	1,291			1,291
Retail Trade	724	27	112	863
Other Transport	610	78	17	705
Business Services		585	76	661
Finance, Insurance and Real Estate	29	457	118	603
Education and Health Care		17	430	447
Personal Services	122	66	69	257
Gasoline Stations	179	2	6	186
Communications		51	28	78
Wholesale Trade		50	20	70
Construction and Utilities		38	7	44
Government		17	2	19
Manufacturing		9	1	10
Agriculture, Fishing, Mining		0	1	1
Air Transport		0	0	0

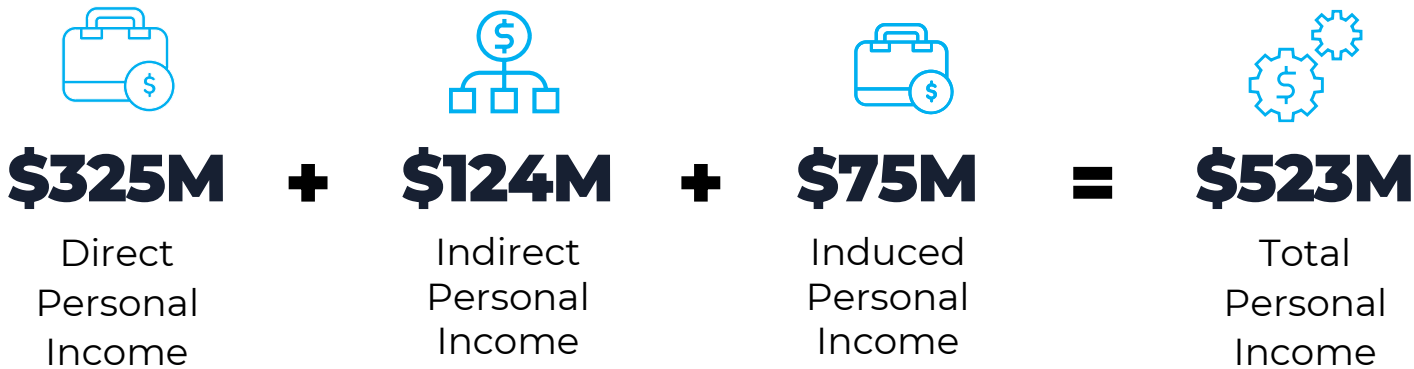
Source: Tourism Economics

The visitor economy supported **6.0% of all jobs** in Overland Park, including over 3,500 jobs in the food and beverage industry.



Personal Income Impacts

Visitor activity generated \$325 million in direct personal income in 2025. Including indirect and induced impacts, employees received \$523 million in personal income.



Personal Income by Industry (2025)

\$ millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$325	\$124	\$75	\$523
Food & Beverage	\$118	\$5	\$5	\$129
Recreation and Entertainment	\$68	\$5	\$1	\$74
Business Services		\$58	\$8	\$65
Lodging	\$50			\$50
Finance, Insurance and Real Estate	\$10	\$23	\$9	\$42
Retail Trade	\$33	\$1	\$6	\$41
Other Transport	\$26	\$4	\$1	\$31
Education and Health Care		\$1	\$29	\$30
Personal Services	\$8	\$5	\$4	\$17
Communications		\$8	\$7	\$15
Gasoline Stations	\$10	\$0	\$0	\$10
Wholesale Trade		\$6	\$3	\$9
Construction and Utilities		\$4	\$1	\$4
Government		\$2	\$0	\$3
Manufacturing		\$1	\$0	\$1
Agriculture, Fishing, Mining		\$0	\$0	\$0
Air Transport		\$0	\$0	\$0

Source: Tourism Economics



Tax Impacts

Visitor activity generated \$203 million in government revenues in 2025.

State and local taxes alone tallied \$108 million.

Each household in Overland Park would need to be taxed an additional \$1,280 to replace the visitor-generated taxes received by state and local governments in 2025, an increase of 3.2% from the prior year.

Tax Impacts (2025)

\$ millions

	Direct	Indirect / Induced	Total
Total Tax Revenues	\$141.6	\$61.8	\$203.3
Federal Taxes	\$55.2	\$39.9	\$95.1
Personal Income	\$16.0	\$12.4	\$28.4
Corporate	\$5.1	\$4.6	\$9.7
Indirect Business	\$3.1	\$0.7	\$3.8
Social Insurance	\$31.0	\$22.1	\$53.1
State and Local Taxes	\$86.3	\$21.9	\$108.3
Sales	\$38.1	\$11.3	\$49.4
Lodging	\$12.6		\$12.6
Personal Income	\$4.0	\$2.5	\$6.6
Corporate	\$1.7	\$1.5	\$3.1
Excise and Fees	\$3.3	\$0.8	\$4.1
Property	\$26.6	\$5.8	\$32.4

Source: Tourism Economics



State tax revenues totaled \$58 million. Including sales and bed taxes, \$51 million in local taxes were generated in 2025.

Of the \$18 million in local sales tax revenue, county tax collections accounted for \$9.4 million (52%), while municipal tax collections totaled \$8.8 million (48%).

State and Local Tax Impacts (2025)

\$ millions

	State	Local
Total Tax Revenues	\$57.5	\$50.7
Sales	\$31.1	\$18.2
Lodging		\$12.6
Personal Income	\$6.6	
Corporate	\$3.1	
Excise and Fees	\$2.4	\$1.7
Property	\$14.3	\$18.1

Source: Tourism Economics

RESULTS IN CONTEXT



Results in Context

The visitor economy is an economic pillar in Overland Park.



\$1.0B VISITOR SPENDING

Visitors spent \$2.76 million per day, on average, in Overland Park.



\$523M PERSONAL INCOME

Visitor spending drives income across industries, including six industries with more than \$40 million in total income each.



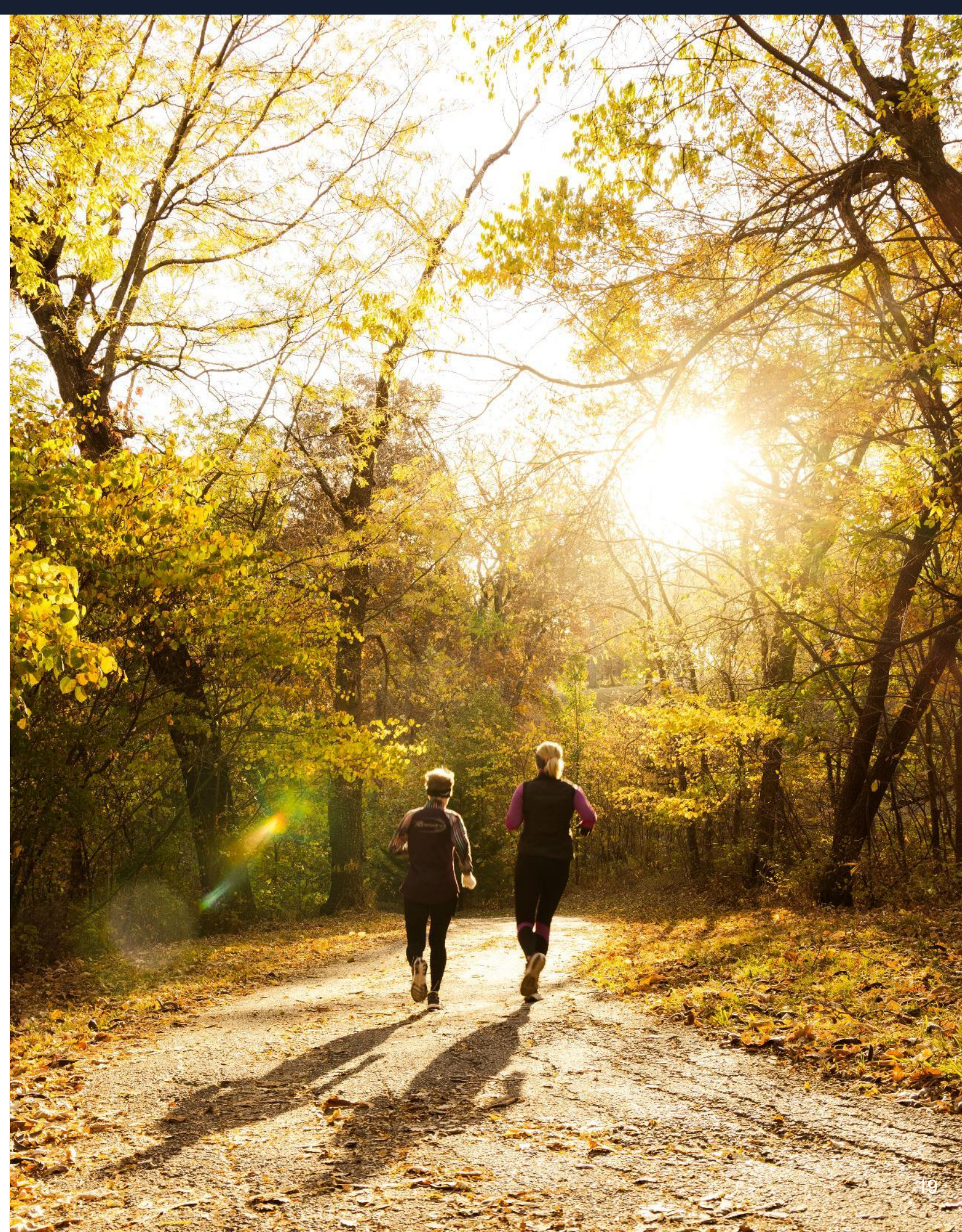
11,182 JOBS

The visitor economy sustained 6.0% of all jobs in Overland Park.



\$108M STATE & LOCAL TAXES

Each household in Overland Park would need to be taxed an additional \$1,280 to replace the visitor-generated taxes received by state and local governments in 2025, an increase of 3.2% from the prior year.



Results in Context

Local Tax Impacts in Context



\$51M LOCAL TAXES

The \$51 million in local taxes generated by Overland Park’s visitor economy is enough to pay the annual salaries of approximately 788 police officers.



\$51M LOCAL TAXES

To replace the \$51 million in local taxes generated by the visitor economy, the property tax rate will need to increase by 9.0 mills (a mill represents \$1 of property tax revenue for every \$1,000 of assessed property value).



\$51M LOCAL TAXES

The \$51 million in local taxes generated by Overland Park’s visitor economy is enough to cover the city’s 2025 public works budget 2.1 times over.



\$51M LOCAL TAXES

The \$51 million in local taxes generated by Overland Park’s visitor economy is enough to cover the city’s 2025 community development budget 1.3 times over (includes all of Parks & Recreation and Planning & Development services).

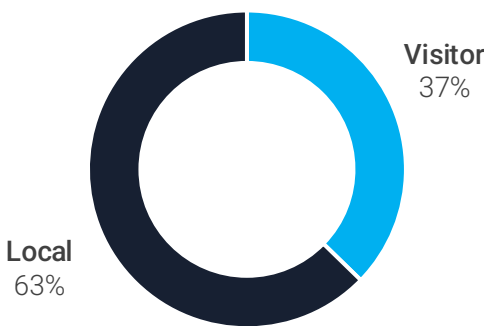
Spending per Visitor

Visitors to Overland Park spent approximately \$190 per visitor in 2025. This translates to 5.3 million visitors, a 4.7% or 200,000 increase in visitor volume. Average spending by each overnight visitor to Overland Park was \$270 in 2025, while day visitors spent \$118 on average.

Visitor vs Local Demand: Restaurant Sales

Visitors to Overland Park spent \$283 million on food and beverage in 2025. Discounting spending in grocery stores, visitors spent \$226 million; this accounts for approximately 37% of all restaurant spending in Overland Park.

Overland Park Restaurant Sales, by Segment
percent of all restaurant spending in Overland Park



Source: Tourism Economics

APPENDIX



Appendix

Methodology Overview

A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as the City of Overland Park in Johnson County, KS.

Visitor spending is derived by analyzing 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.

To assess economic impacts beyond visitor spending, 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.

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 visitor 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.

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