



2021

KANSAS STATE PARKS

Economic Contributions to Regional and State Economies



WICHITA STATE
UNIVERSITY
W. FRANK BARTON
SCHOOL OF BUSINESS



CEDBR
Center for Economic Development
and Business Research

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EXECUTIVE SUMMARY

The Kansas State Parks system properties provide a valuable outdoor recreational resource for residents and visitors to Kansas. The towns and cities around Kansas State Park sites benefit economically from state spending on improvements, as they enhance the tourism experience and build increased capacity and quality of life. Established amenity-rich locations further capture tourism spending that would otherwise leak out of the region and state. In many cases, the economic benefits generated from outdoor tourism are an integral component of the surrounding community and a key revenue source for businesses.

The purpose of this study was to examine the economic impact of the Kansas State Parks on both the regional and state economies. The study used expenditure data from the parks and spending patterns of visitors to derive the financial contributions, which captures the market transaction side of the impact. Since it does not capture the full value associated with the state-wide natural amenities, the project also included qualitative elements from guests and vendors providing goods and services.

This project emailed 39,156 qualified visitors who stayed at a park at least once between April 1 and September 11, 2020, at one of the twenty-eight locations within the Kansas State Park system. At a state-wide level, survey respondents had an average party size of 4, stayed 4.1 days, and spent about \$510 per trip. The largest share of the trip cost was for the camping site or cabin, excluding major one-time purchases like an RV, kayak, or jet ski. Groceries, transportation, and recreation gear were the following three most significant expenditures. The total estimated spending by visitors in Kansas was 170.1 million dollars in 2020.

Annual state-wide visitor traffic increased from 5.7 to 8.6 million between 2019 to 2020. The increased traffic accounted for all visitors and the number of days that they stayed within the park. The dramatic increase of 52 percent in visitor days was primarily in response to the global pandemic. This study used the annual average total visitor days of 6.8 million, which excluded 2020, to represent the impact; however, the report also analyzed the 2020 visitations.

The 6.8 million visitors engaged in nature and family-related activities at Kansas State Parks support 5,058 jobs annually, equating to 132.1 million dollars in wages. The purchases of food, gasoline, tents, and other supplies heavily support the service and retail sectors of the economy, which accounted for 96 percent of the jobs impact. The industry sales associated with those jobs were estimated to be 287.4 million dollars annually. The impact across the state mainly varied due to the level of annualized day visitors. The top three state parks were El Dorado, Hillsdale, and Tuttle Creek. All three accounted for thirty-one percent of the total annual visitors and about thirty-three percent of the output impact on the state economy. Cheney, Milford, and Clinton, the following three largest state parks, all had a similar number of visitors and economic effects.



EXECUTIVE SUMMARY (CONTINUED)

ECONOMIC CONTRIBUTION BY STATE PARK				
	ANNUAL VISITORS	LABOR	EMPLOYMENT	OUTPUT
Cedar Bluff	167,973	\$2,531,518	85	\$7,985,071
Cheney	466,244	\$10,016,267	346	\$21,213,133
Clinton	449,697	\$10,213,388	340	\$22,146,349
Crawford	289,884	\$5,740,522	207	\$11,999,504
Cross Timbers	350,090	\$6,402,672	263	\$13,623,561
Eisenhower	180,054	\$3,282,325	145	\$7,465,306
El Dorado	885,309	\$16,991,425	659	\$39,047,670
Elk City	169,188	\$3,537,408	124	\$6,914,884
Fall River	196,108	\$2,758,835	144	\$6,612,956
Flint Hills Trail	38,600	\$757,237	33	\$1,847,333
Glen Elder	185,359	\$3,288,582	140	\$6,419,964
Hillsdale	657,783	\$13,115,840	487	\$29,368,728
Kanopolis	237,015	\$4,136,021	176	\$8,169,023
Kaw River	29,333	\$675,334	21	\$1,456,235
Lake Scott	170,752	\$3,018,024	130	\$6,479,153
Little Jerusalem Badlands	3,522	\$81,423	5	\$225,028
Lovewell	237,958	\$4,309,427	166	\$7,690,924
Meade	117,318	\$1,920,535	94	\$4,305,545
Milford	464,406	\$8,197,493	326	\$16,029,794
Perry	214,313	\$3,661,792	182	\$8,921,982
Pomona	111,204	\$2,199,966	93	\$4,785,736
Prairie Dog	170,538	\$3,780,252	142	\$8,889,150
Prairie Spirit Trail	66,070	\$1,649,165	56	\$3,396,046
Sand Hills	50,646	\$1,195,078	38	\$2,482,505
Tuttle Creek	594,367	\$11,646,833	434	\$25,470,146
Webster	126,369	\$1,985,646	102	\$4,178,828
Wilson	205,438	\$1,972,182	75	\$3,942,354
Kansas State Parks	6,809,562	\$132,061,278	5,058	\$287,426,531

Source: CEDBR

EXECUTIVE SUMMARY (CONTINUED)

Another way of looking at the economic impact of the 5,058 jobs is by the tourism activity of the visitor. The visitor survey instrument asked the guests to provide their primary reason for the trip and all engagement during the visit. The impact of the specialty activities like boating and equestrian only used the primary purpose of the trip, which understates the full market value.

The top three activities were family time, hiking, and observing wildlife. Although observing wildlife and being close to nature had the most considerable estimated impact, it had the lowest number of visitors that chose that activity as their primary reason for the trip. The larger overall impact for this amenity was likely because it was ubiquitous and an underlying purpose for the trip.

Camping was the highest selected primary activity of all visitors to Kansas State Parks and had an estimated total employment impact of just less than 1,201 and \$39.3 million dollars in labor income. The average per person per day spending was just under twenty dollars.

Although equestrian activities had the lowest number of total estimated visitors and the second-lowest total impact, it had one of the most significant values for regional business owners. Equestrian visitors had the highest per person per day spending of all the activities at approximately \$52.89.

ECONOMIC CONTRIBUTION BY ACTIVITY			
PRIMARY PURPOSE BY ACTIVITY			
	LABOR INCOME	EMPLOYMENT	OUTPUT
Boating	\$7,271,523	217	\$24,426,425
Camping	\$39,274,459	1,201	\$124,908,552
Equestrian	\$3,504,071	112	\$10,558,459
Fishing	\$6,157,033	192	\$19,703,031
Other	\$6,191,203	192	\$19,684,829
Special Event	\$1,351,106	42	\$4,305,064
ALL ENGAGEMENT BY ACTIVITY			
	LABOR INCOME	EMPLOYMENT	OUTPUT
Family time	\$47,917,204	1,481	\$153,039,832
Hiking/Biking	\$28,412,814	898	\$91,623,274
Observing wildlife	\$70,208,496	2,197	\$220,425,503

Source: CEDBR

The 2020 Kansas State Park impact had an even more profound contribution, supporting an additional 1,354 jobs. Those 6,409 total jobs in 2020 generated an estimated 167.3 million dollars in wages. During the pandemic, the retail sector was one of the hardest-hit sectors, as the households shuttered in place. Nature-based tourism provided retail demand at a point when overall consumption declined, a welcomed relief as businesses were facing both layoffs and closures. The impact of this tourism consumption was predominantly felt within forty miles of the state park that they visited. Based on the survey estimates, approximately 67 percent of the spending was near their destination. Although some of the highest-trafficked parks are near urban cities, the majority are in rural areas of the state.

EXECUTIVE SUMMARY (CONTINUED)

Capital investments were not included in the total contribution impact, as the funding tends to be one-time expenditures and vary dramatically by year. Capital investments comprise spending on trail improvements, adding cabins, and other maintenance. The annualized construction impact, which includes 2020, had a total impact of 20 jobs and 1.6 million dollars in wages. Since the Kansas State Parks regularly invests in maintenance and development, the impacts should be considered as a critical value-added component to the state economy. It is important to note that all investments in state parks increase the quality and accessibility, which create a public value to society.

Although this study calculated the quantitative values associated with tourism spending, the state parks provide other measures that are not easily captured within the marketplace. In order to identify the qualitative values, the visitor survey instrument asked questions based on satisfaction, value, and perception of authenticity.

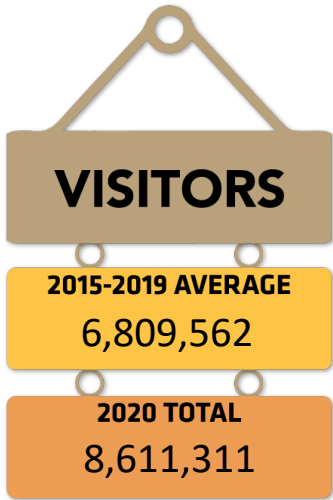
Survey respondents were, on average, quite satisfied with their trips to Kansas state parks; 91.9 percent of respondents would recommend the park to other potential visitors, and 79.9 percent were likely to revisit the same state park within 12 months. Respondents generally had positive perceptions of state parks, with at least two-thirds agreeing with each of the perception categories included in the survey.

State parks provide a unique psychological value to individuals and society. National academic research has shown that connectedness with nature is linked with happiness, well-being, and general satisfaction with life. Within the perceptions portion of the survey, just over 90 percent of respondents identified the parks as natural, which is also why they felt that it was an authentic and genuine experience. More importantly, they thought that the parks added meaning to their lives and revealed what was important.

Less than 8 percent of respondents believed the value they received from their visit was less than its cost, another sign of the high level of satisfaction visitors had with the parks. The three top benefits respondents received from their visits were spending quality time with their families, decreasing their stress levels, and increasing their quality of life. These benefits were consistent across all generations of visitors to the park, with 90 percent or more of Baby Boomers, Generation X, and Millennials getting more value from their trip than the cost.

Similar to the qualitative benefits to households, this study also identified non-market values for businesses within Kansas. When asked about their dependency on the state parks as a source of revenue, more than half of the respondents indicated that they were between moderately to very important. An overwhelming number of firms indicated that if a state park closed, forty-five percent indicated they would close, downsize, or relocate.

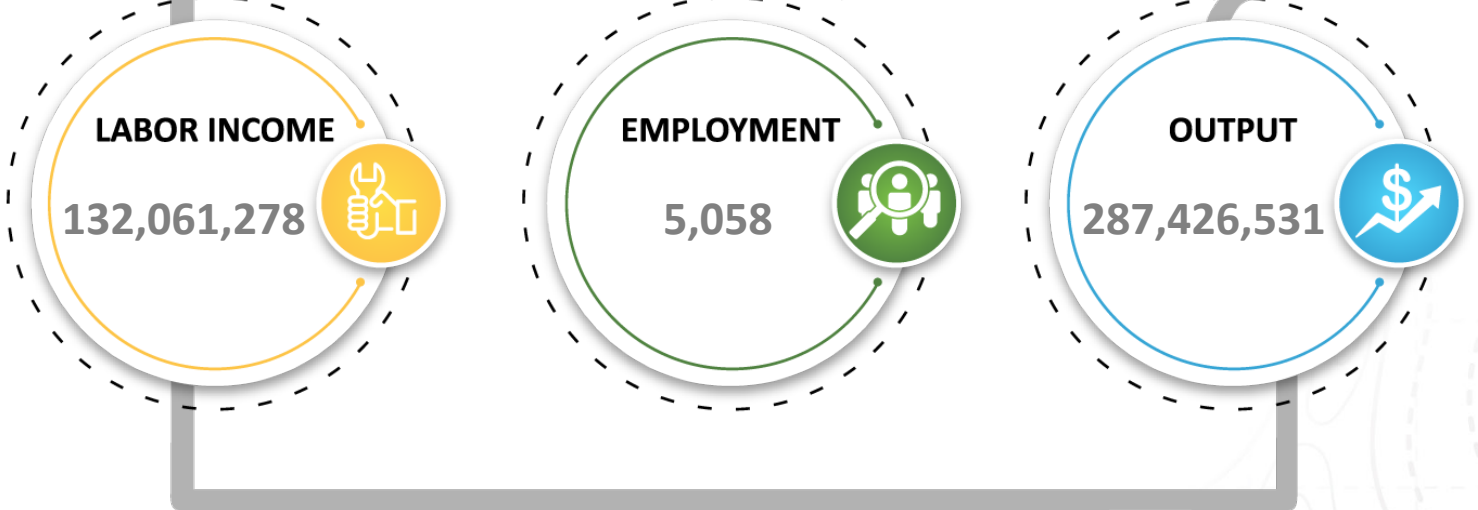
KANSAS | ECONOMIC IMPACT



*Visitor Days



Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$5,412,592	\$109,253,659	\$17,395,027	\$132,061,278
EMPLOYMENT	119	4,512	427	5,058
OUTPUT	\$4,705,635	\$219,484,125	\$63,236,771	\$287,426,531

Source: CEDBR

KANSAS | ECONOMIC IMPACT (CONTINUED)

2020 KANSAS STATE PARKS TOTAL CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$67,389	-	\$351,811
Mining 	\$150,080	4	\$2,018,131
Construction 	\$532,465	6	\$1,906,904
Manufacturing 	\$634,810	6	\$6,935,581
TIPU 	\$7,160,749	145	\$41,455,336
Trade 	\$75,182,252	3,478	\$95,077,295
Service 	\$46,733,317	1,402	\$136,396,862
Government 	\$1,600,209	18	\$3,284,582
Total	\$132,061,278	5,058	\$287,426,531

Source: CEDBR

STATE PARK TAX

	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$22,670,706	\$23,193,698	\$2,356,453	\$2,802,699	\$319,844
2020	\$29,348,151	\$30,194,568	\$3,072,265	\$3,604,667	\$410,579

Source: CEDBR





KANSAS STATE PARKS- REGIONAL

	AVERAGE		2020	
	Local	State	Local	State
Labor	\$92,127,183	\$39,934,088	\$116,767,493	\$50,487,865
Employment	3,918	1,146	4,935	1,447
Output	\$193,053,093	\$94,373,408	\$247,591,874	\$119,400,684

Source: CEDBR









KANSAS | ECONOMIC IMPACT (CONTINUED)

Construction

	DIRECT 	INDIRECT 	INDUCED 	TOTAL 
LABOR	\$1,078,129	\$227,723	\$298,724	\$1,604,576
EMPLOYMENT	19	3	6	29
OUTPUT	\$2,405,996	\$757,125	\$983,121	\$4,146,242

Source: CEDBR

2020 KANSAS STATE PARKS CONSTRUCTION SPENDING BY INDUSTRY

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$778	-	\$3,819
Mining 	\$7,192	0	\$40,009
Construction 	\$1,082,116	19	\$2,420,292
Manufacturing 	\$39,392	1	\$241,822
TIPU 	\$53,392	1	\$182,633
Trade 	\$87,209	2	\$289,528
Service 	\$327,897	6	\$949,055
Government 	\$6,600	0	\$19,085
Total	\$1,604,576	29	\$4,146,243

Source: CEDBR

Boating

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$3,858,459	\$2,059,670	\$1,353,395	\$7,271,525
EMPLOYMENT	150	38	29	217
OUTPUT	\$13,188,647	\$6,781,899	\$4,455,881	\$24,426,427

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

BOATING INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$4,745	0	\$24,381
Mining		\$13,239	1	\$162,404
Construction		\$41,869	1	\$145,167
Manufacturing		\$53,462	1	\$676,888
TIPU		\$856,621	15	\$4,655,005
Trade		\$3,643,784	135	\$10,455,798
Service		\$2,502,489	62	\$7,998,226
Government		\$155,314	2	\$308,556
Total		\$7,271,523	217	\$24,426,425

Source: CEDBR

BOATING TAX REVENUE	
	AVERAGE
Sales	\$1,118,430
Property	\$882,272
Other Production	\$110,298
Households	\$177,375
Corporations	\$21,785

Source: CEDBR

BOATING TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$22.22	\$6.54
Camping & Cabins	\$127.71	\$6.70
Other Lodging	\$4.03	\$5.53
Restaurants & Bars	\$36.49	\$18.66
Groceries	\$99.87	\$31.35
Transportation	\$97.49	\$29.46
Recreation Gear	\$102.61	\$25.95
Shopping	\$10.91	\$8.13
Entertainment	\$3.43	\$3.43
Marinas	\$87.33	\$10.36
Other	\$20.16	\$8.57
Total Spending	\$612.25	\$154.66

Source: CEDBR

Camping

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$22,340,697	\$9,624,038	\$7,309,725	\$39,274,460
EMPLOYMENT	859	185	157	1,201
OUTPUT	\$69,264,083	\$31,577,412	\$24,067,057	\$124,908,552

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

CAMPING INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$26,837	1	\$136,650
Mining		\$42,318	2	\$502,443
Construction		\$220,926	4	\$767,378
Manufacturing		\$250,753	4	\$2,500,150
TIPU		\$3,595,203	60	\$15,474,060
Trade		\$21,182,811	778	\$60,724,518
Service		\$13,426,943	346	\$43,563,303
Government		\$528,668	6	\$1,240,050
Total		\$39,274,459	1,201	\$124,908,552

Source: CEDBR

CAMPING TAX REVENUE	
	AVERAGE
Sales	\$6,340,157
Property	\$5,001,426
Other Production	\$625,256
Households	\$957,319
Corporations	\$121,314

Source: CEDBR

CAMPING TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$18.98	\$4.25
Camping & Cabins	\$96.37	\$8.03
Other Lodging	\$0.91	\$2.50
Restaurants & Bars	\$26.51	\$9.15
Groceries	\$75.54	\$24.99
Transportation	\$56.22	\$24.57
Recreation Gear	\$44.36	\$17.99
Shopping	\$9.40	\$4.43
Entertainment	\$6.12	\$2.50
Marinas	\$17.61	\$1.39
Other	\$13.86	\$5.15
Total Spending	\$365.88	\$104.96

Source: CEDBR

Equestrian

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$2,076,557	\$775,343	\$652,172	\$3,504,072
EMPLOYMENT	83	15	14	112
OUTPUT	\$5,858,492	\$2,552,697	\$2,147,270	\$10,558,460

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

EQUESTRIAN INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$2,048	0	\$10,595
Mining		\$2,878	0	\$33,423
Construction		\$18,843	0	\$65,616
Manufacturing		\$20,477	0	\$182,436
TIPU		\$269,813	4	\$1,043,619
Trade		\$2,045,879	80	\$5,554,559
Service		\$1,106,149	27	\$3,573,459
Government		\$37,984	1	\$94,752
Total		\$3,504,071	112	\$10,558,459

Source: CEDBR

EQUESTRIAN TAX REVENUE	
	AVERAGE
Sales	\$564,046
Property	\$444,947
Other Production	\$55,626
Households	\$85,399
Corporations	\$9,683

Source: CEDBR

EQUESTRIAN TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$16.81	\$12.54
Camping & Cabins	\$65.25	\$13.08
Other Lodging	\$9.73	\$11.47
Restaurants & Bars	\$20.81	\$11.13
Groceries	\$54.27	\$31.83
Transportation	\$74.45	\$46.56
Recreation Gear	\$180.89	\$110.13
Shopping	\$16.21	\$7.46
Entertainment	\$8.79	\$4.73
Marinas	\$11.76	\$0.02
Other	\$24.29	\$16.65
Total Spending	\$483.26	\$265.62

Source: CEDBR

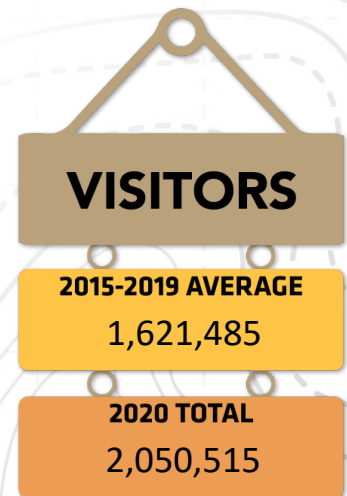
Family Time

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$27,203,672	\$11,795,252	\$8,918,280	\$47,917,204
EMPLOYMENT	1,063	227	192	1,481
OUTPUT	\$85,008,526	\$38,668,000	\$29,363,307	\$153,039,832

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

FAMILY TIME INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$33,454	1	\$172,867
Mining		\$52,089	2	\$618,619
Construction		\$268,893	5	\$933,728
Manufacturing		\$313,565	5	\$3,112,353
TIPU		\$4,318,969	72	\$18,776,067
Trade		\$24,900,988	927	\$71,260,146
Service		\$17,371,722	462	\$56,638,164
Government		\$657,524	8	\$1,527,888
Total		\$47,917,204	1,481	\$153,039,832

Source: CEDBR

FAMILY TIME TAX REVENUE	
	AVERAGE
Sales	\$7,659,435
Property	\$6,042,137
Other Production	\$755,363
Households	\$1,167,858
Corporations	\$149,857

Source: CEDBR

FAMILY TIME TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$23.18	\$5.94
Camping & Cabins	\$129.08	\$8.19
Other Lodging	\$6.60	\$6.17
Restaurants & Bars	\$33.12	\$14.17
Groceries	\$73.84	\$33.31
Transportation	\$57.99	\$28.54
Recreation Gear	\$40.91	\$24.77
Shopping	\$10.34	\$6.80
Entertainment	\$7.18	\$3.68
Marinas	\$17.76	\$2.47
Other	\$22.25	\$6.73
Total Spending	\$422.26	\$140.77

Source: CEDBR

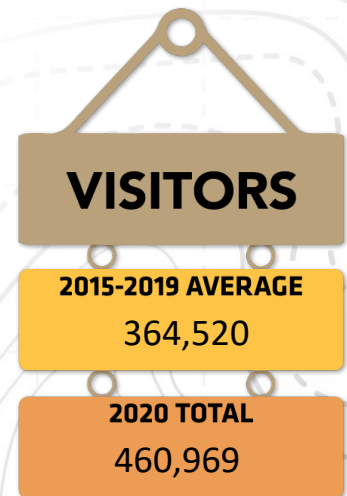
Fishing

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$3,486,259	\$1,524,839	\$1,145,934	\$6,157,032
EMPLOYMENT	138	29	25	192
OUTPUT	\$10,939,450	\$4,990,590	\$3,772,990	\$19,703,031

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

FISHING INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$4,257	0	\$21,980
Mining		\$6,559	0	\$77,625
Construction		\$35,419	1	\$123,091
Manufacturing		\$39,907	1	\$392,191
TIPU		\$550,671	9	\$2,368,637
Trade		\$3,179,253	121	\$9,204,178
Service		\$2,256,290	60	\$7,318,252
Government		\$84,677	1	\$197,077
Total		\$6,157,033	192	\$19,703,031

Source: CEDBR

FISHING TAX REVENUE	
	AVERAGE
Sales	\$1,011,197
Property	\$797,682
Other Production	\$99,723
Households	\$150,042
Corporations	\$19,030

Source: CEDBR

FISHING TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$27.29	\$7.94
Camping & Cabins	\$122.95	\$17.79
Other Lodging	\$19.10	\$7.05
Restaurants & Bars	\$33.69	\$18.76
Groceries	\$63.88	\$41.71
Transportation	\$75.61	\$52.10
Recreation Gear	\$63.22	\$44.06
Shopping	\$9.61	\$6.22
Entertainment	\$6.61	\$2.75
Marinas	\$19.70	\$4.39
Other	\$25.46	\$12.65
Total Spending	\$467.11	\$215.42

Source: CEDBR

Hiking/Biking Trail Use

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$16,099,991	\$7,024,713	\$5,288,109	\$28,412,813
EMPLOYMENT	649	136	114	898
OUTPUT	\$51,117,299	\$23,094,732	\$17,411,242	\$91,623,274

Source: CEDBR



*Visitor Days

HIKING/BIKING TRAIL USE INDUSTRY CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$21,717	1	\$115,678
Mining 	\$29,287	1	\$344,773
Construction 	\$162,465	3	\$565,089
Manufacturing 	\$195,878	3	\$1,855,619
TIPU 	\$2,414,006	39	\$10,311,342
Trade 	\$13,539,061	512	\$39,176,741
Service 	\$11,663,795	334	\$38,348,573
Government 	\$386,605	5	\$905,459
Total	\$28,412,814	898	\$91,623,274

Source: CEDBR

HIKING/BIKING TAX REVENUE

	AVERAGE
Sales	\$4,528,856
Property	\$3,572,583
Other Production	\$446,629
Households	\$692,272
Corporations	\$90,186

Source: CEDBR

HIKING/BIKING TRIP SPENDING

	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$11.81	\$5.62
Camping & Cabins	\$51.58	\$3.53
Other Lodging	\$8.65	\$4.52
Restaurants & Bars	\$28.16	\$7.68
Groceries	\$27.24	\$18.78
Transportation	\$30.49	\$22.91
Recreation Gear	\$17.50	\$58.41
Shopping	\$3.32	\$2.72
Entertainment	\$2.30	\$0.64
Marinas	\$6.83	\$0.11
Other	\$9.58	\$9.16
Total Spending	\$197.46	\$134.10

Source: CEDBR

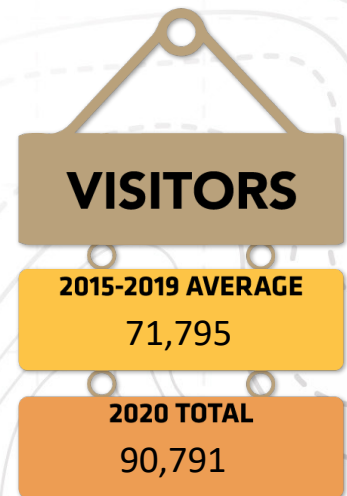
Observing Wildlife/Being Close to Nature

Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$40,713,501	\$16,428,148	\$13,066,847	\$70,208,496
EMPLOYMENT	1,596	320	281	2,197
OUTPUT	\$123,748,532	\$53,653,246	\$43,023,726	\$220,425,503

Source: CEDBR



*Visitor Days

OBSERVING WILDLIFE/BEING CLOSE TO NATURE INDUSTRY CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$50,805	2	\$265,867
Mining 	\$58,093	2	\$671,533
Construction 	\$392,335	7	\$1,365,243
Manufacturing 	\$445,256	7	\$3,896,644
TIPU 	\$5,560,976	89	\$21,147,806
Trade 	\$35,942,644	1,336	\$102,921,079
Service 	\$26,965,762	744	\$88,156,495
Government 	\$792,625	9	\$2,000,836
Total	\$70,208,496	2,197	\$220,425,503

Source: CEDBR

OBSERVING WILDLIFE TAX REVENUE

	AVERAGE
Sales	\$11,373,658
Property	\$8,972,098
Other Production	\$1,121,654
Households	\$1,709,847
Corporations	\$221,677

Source: CEDBR

OBSERVING WILDLIFE TRIP SPENDING

	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$12.64	\$8.93
Camping & Cabins	\$93.84	\$19.39
Other Lodging	\$9.80	\$8.16
Restaurants & Bars	\$22.32	\$16.70
Groceries	\$38.24	\$29.95
Transportation	\$36.35	\$20.70
Recreation Gear	\$14.03	\$90.43
Shopping	\$8.77	\$4.90
Entertainment	\$3.14	\$4.08
Marinas	\$2.40	\$0.20
Other	\$11.35	\$4.33
Total Spending	\$252.87	\$207.78

Source: CEDBR

Other

Kansas State Parks



Other









	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$3,535,887	\$1,503,033	\$1,152,283	\$6,191,203
EMPLOYMENT	139	29	25	193
OUTPUT	\$10,981,187	\$4,909,690	\$3,793,950	\$19,684,828

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

OTHER INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$4,415	0	\$22,723
Mining		\$5,811	0	\$67,976
Construction		\$35,419	1	\$123,192
Manufacturing		\$39,235	1	\$364,755
TIPU		\$533,970	9	\$2,144,851
Trade		\$3,242,562	121	\$9,456,774
Service		\$2,253,691	60	\$7,318,441
Government		\$76,100	1	\$186,117
Total		\$6,191,203	192	\$19,684,829

Source: CEDBR

OTHER TAX REVENUE	
	AVERAGE
Sales	\$1,033,188
Property	\$815,029
Other Production	\$101,892
Households	\$150,820
Corporations	\$19,219

Source: CEDBR

OTHER TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$19.42	\$4.46
Camping & Cabins	\$100.78	\$6.74
Other Lodging	\$6.69	\$6.52
Restaurants & Bars	\$28.51	\$16.79
Groceries	\$57.46	\$23.15
Transportation	\$61.45	\$32.03
Recreation Gear	\$45.82	\$7.85
Shopping	\$15.84	\$3.94
Entertainment	\$3.77	\$3.02
Marinas	\$9.71	\$0.08
Other	\$18.15	\$8.52
Total Spending	\$367.61	\$113.09

Source: CEDBR

Special Event

Kansas State Parks



Special Event









	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$777,533	\$322,109	\$251,464	\$1,351,106
EMPLOYMENT	31	6	5	42
OUTPUT	\$2,430,219	\$1,046,894	\$827,950	\$4,305,064

Source: CEDBR



*Visitor Days

KANSAS | ECONOMIC IMPACT (CONTINUED)

SPECIAL EVENT INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$961	-	\$4,922
Mining		\$1,174	-	\$13,662
Construction		\$7,596	0	\$26,190
Manufacturing		\$8,426	0	\$75,984
TIPU		\$111,315	2	\$427,108
Trade		\$697,990	26	\$2,017,071
Service		\$508,694	14	\$1,702,003
Government		\$14,950	0	\$38,124
Total		\$1,351,106	42	\$4,305,064

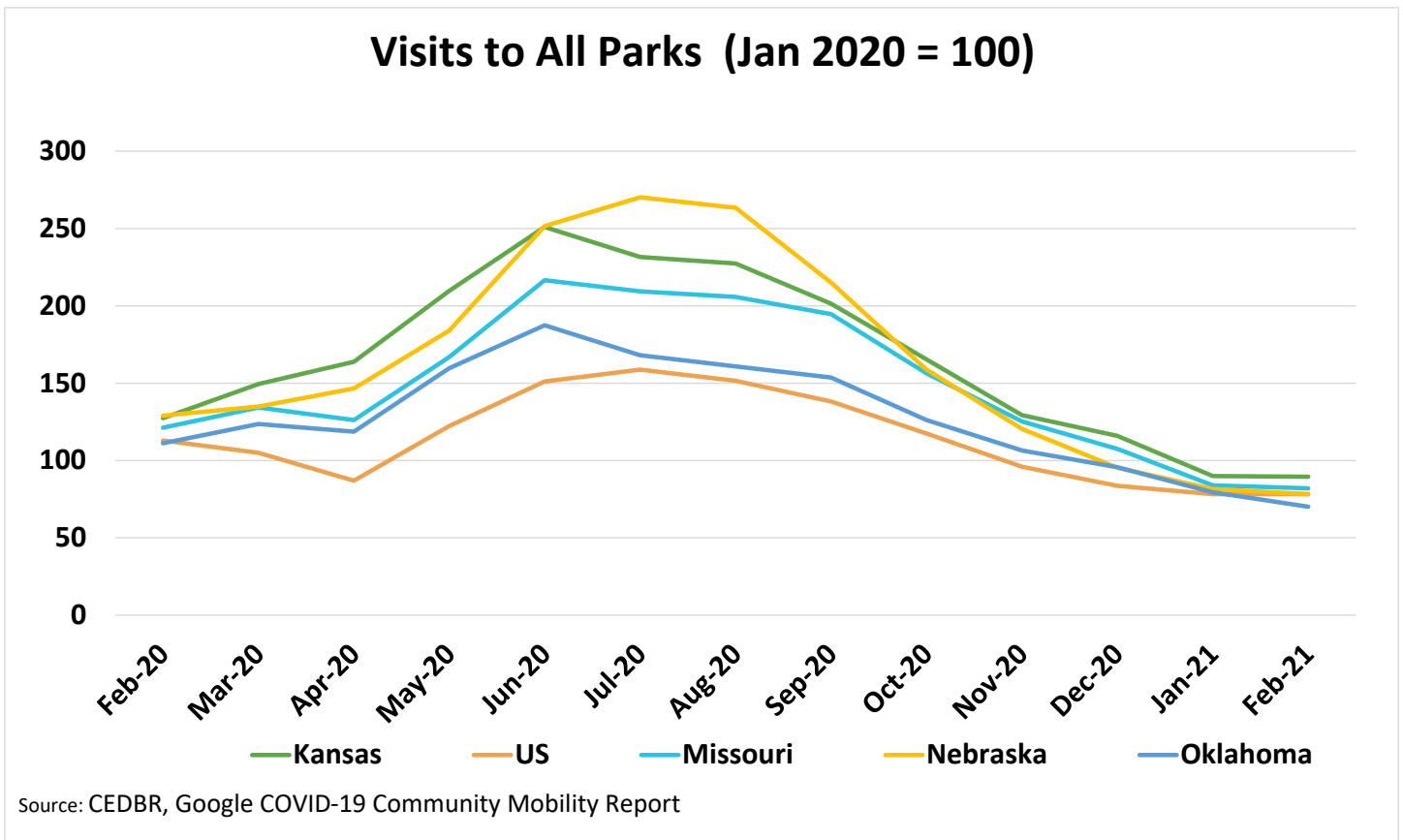
Source: CEDBR

SPECIAL EVENT TAX REVENUE	
	AVERAGE
Sales	\$221,839
Property	\$174,998
Other Production	\$21,877
Households	\$32,922
Corporations	\$4,591

Source: CEDBR

SPECIAL EVENT TRIP SPENDING		
	WITHIN 40 MILES	REST OF KANSAS
Admission fees	\$16.40	\$3.39
Camping & Cabins	\$96.70	\$1.77
Other Lodging	\$1.67	\$5.56
Restaurants & Bars	\$24.54	\$12.76
Groceries	\$67.33	\$20.72
Transportation	\$47.48	\$22.67
Recreation Gear	\$16.71	\$11.83
Shopping	\$12.06	\$3.89
Entertainment	\$21.89	\$2.22
Marinas	\$4.07	\$1.61
Other	\$26.56	\$5.89
Total Spending	\$335.40	\$92.30

Source: CEDBR



This information on the level of visitors to parks by state was collected by Google using the location data of Android phone users from January 2020 to February 2021. The January 3rd to February 6th, 2020 period was used as the baseline index, to which all other months were compared. This does not account for seasonality, but the data does show how visits to parks varied each month through the year. In this dataset, parks included local parks, state parks, national parks, public gardens, campgrounds, and national forests, among other outdoor recreational spaces.

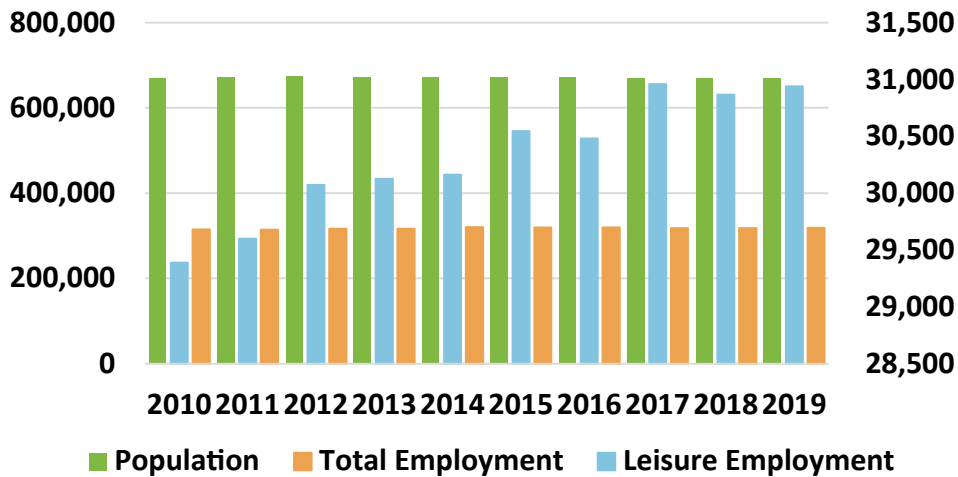
Relative to January 2020, Kansas experienced one of the largest increases in park visitors during the March 2020 to February 2021 time period. On average, park visitation increased 68.7 percent as compared to its January 2020 level, while for the US as a whole, park visitation only increased 13.9 percent. Kansas’s increase was also larger than its neighbors. While Nebraska’s parks received more visitors in the summer months, Kansas’ growth was sustained at a higher level throughout the winter, leading to a higher overall increase throughout the year. In June 2020, the level of visitors to Kansas parks peaked for the year at a level 2.51 times higher than its January 2020 level.

AVERAGE VISITORS FROM MARCH 2020 - FEBRUARY 2021						
	KANSAS	US	MISSOURI	NEBRASKA	OKLAHOMA	COLORADO
Average	168.7	113.9	150.7	166.6	129.1	130.9
<i>*January 2020 = 100</i>						
<i>Source: CEDBR, Google Covid-19 Community Mobility Report</i>						

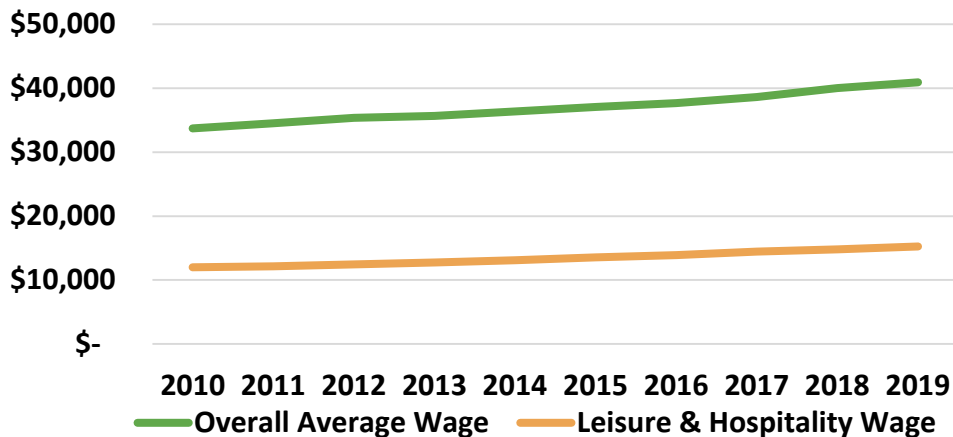
ALL STATE PARK AREAS				
	2018	2019	% CHANGE	5 YR AVG GROWTH
Total Population ¹	766,753	765,292	-0.2%	-0.1%
Total Employment	317,972	318,746	0.2%	-0.1%
Leisure & Hospitality Employment	30,867	30,941	0.2%	0.5%
Leisure & Hospitality Share	9.7%	9.7%	0.0%	0.6%
Average Annual Wage (All Industries)	\$40,013	\$40,911	2.2%	2.4%
Average Annual Wage (Leisure & Hosp)	\$14,815	\$15,240	2.9%	3.1%
L&H Employment Location Quotient	1.04	1.04	0.2%	0.0%

¹ Total Non-institutionalized population
² Ranking based on 21 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

All State Park Areas Employment

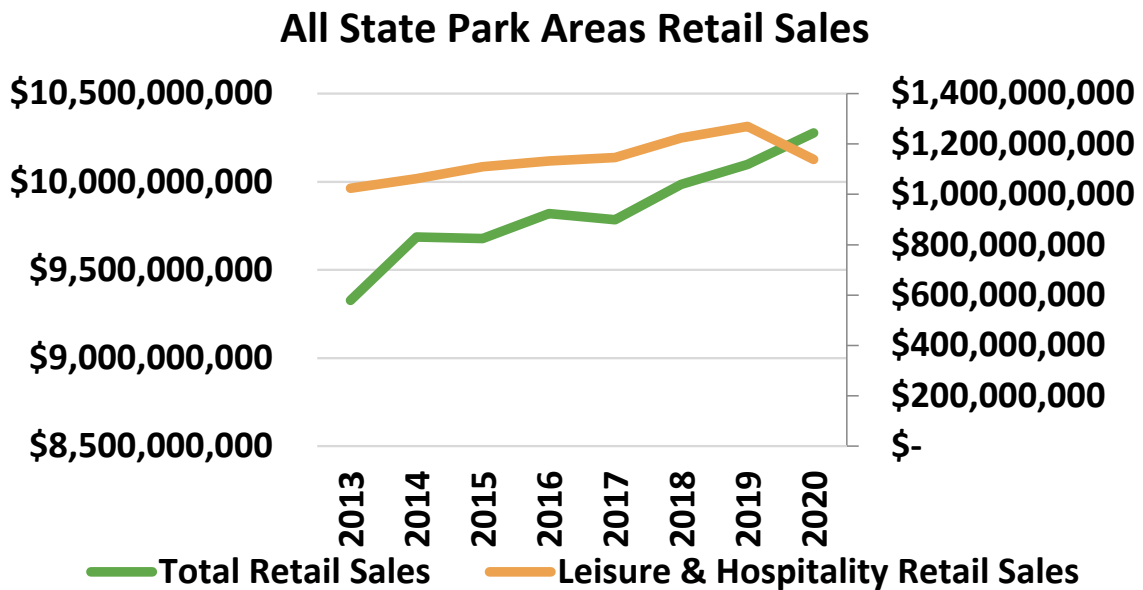


All State Park Areas Average Wages



ALL STATE PARK AREAS				
	2019	2020	% CHANGE	5 YR AVG GROWTH
Total Taxable Retail Sales	\$10,098,040,918	\$10,276,394,566	1.8%	1.2%
Leisure & Hospitality Retail Sales	\$1,269,675,229	\$1,138,041,727	-10.4%	0.5%
Per Capita Retail Sales	\$13,169.87	\$13,428.07	2.0%	1.3%
Per Capita L&H Retail Sales	\$1,655.91	\$1,487.07	-10.2%	0.6%
County Pull Factor (All Sales)	0.89	0.88	-0.9%	-0.1%
County Pull Factor (L&H Sales)	0.85	0.89	5.1%	1.1%

*1 Ranking based on 21 state park areas
Source: CEDBR, Kansas Department of Revenue*



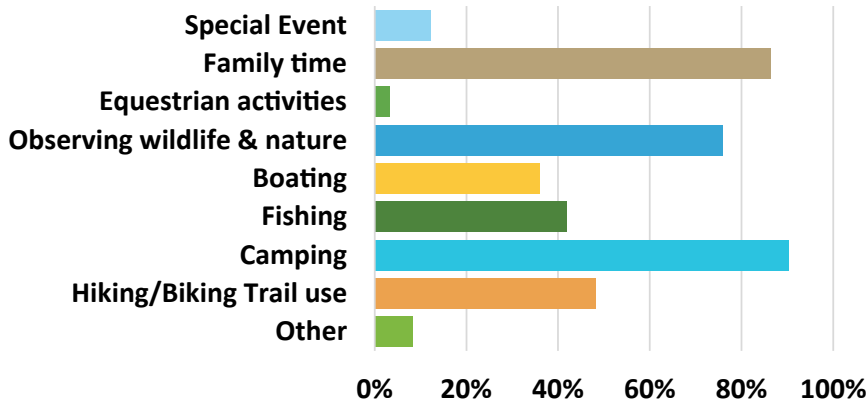
Source: CEDBR & KS Dept of Revenue

Note: Leisure is on secondary axis

Twenty-nine counties in Kansas were home to at least a portion of a Kansas state park. Those counties tended to be more rural than average and contained 26.4 percent of the state’s population in 2019. Due to being more rural, wages, both overall and in the leisure and hospitality sector, tended to be lower than the state average, but growth from 2014 to 2019 kept pace with the state average. The areas’ share of leisure and hospitality workers was 0.4 percentage points higher than the state average, while leisure and hospitality retail spending per capita was \$1,487 in state park market areas, \$184 less than the state average. The market areas’ retail pull factor was 0.88, a sign that overall retail spending in those counties was approximately 12 percent lower than the state average.

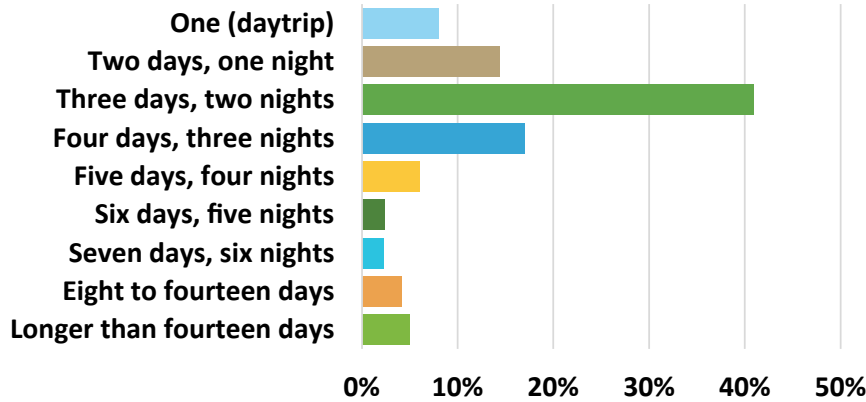
KANSAS | VISITORS SURVEY RESULTS

Visitor Activities



Source: CEDBR

Overall Length of Stay at Park



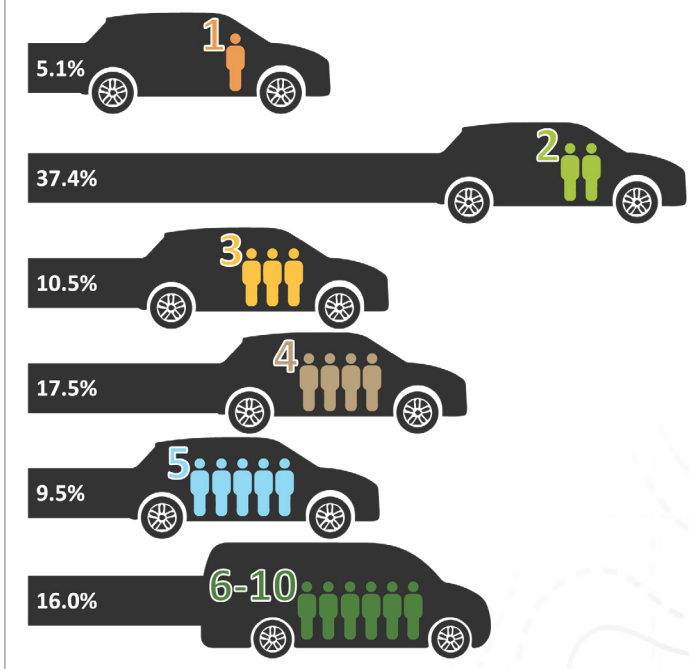
Source: CEDBR

Among survey respondents, the three most popular activities were camping, spending time with family, and observing nature, each of which were engaged in by more than three-quarters of respondents on their most recent state parks visit. More than 54 percent of respondents engaged in at least one of the water-based activities included in the survey, boating or fishing. The average size of respondents' groups was 4 people, and the most common group size was 2 people, which was reported by 37.4 percent of respondents. These groups stayed, on average 4.1 days at the state park on their visit, with 40.9 percent opting for a three day stay.



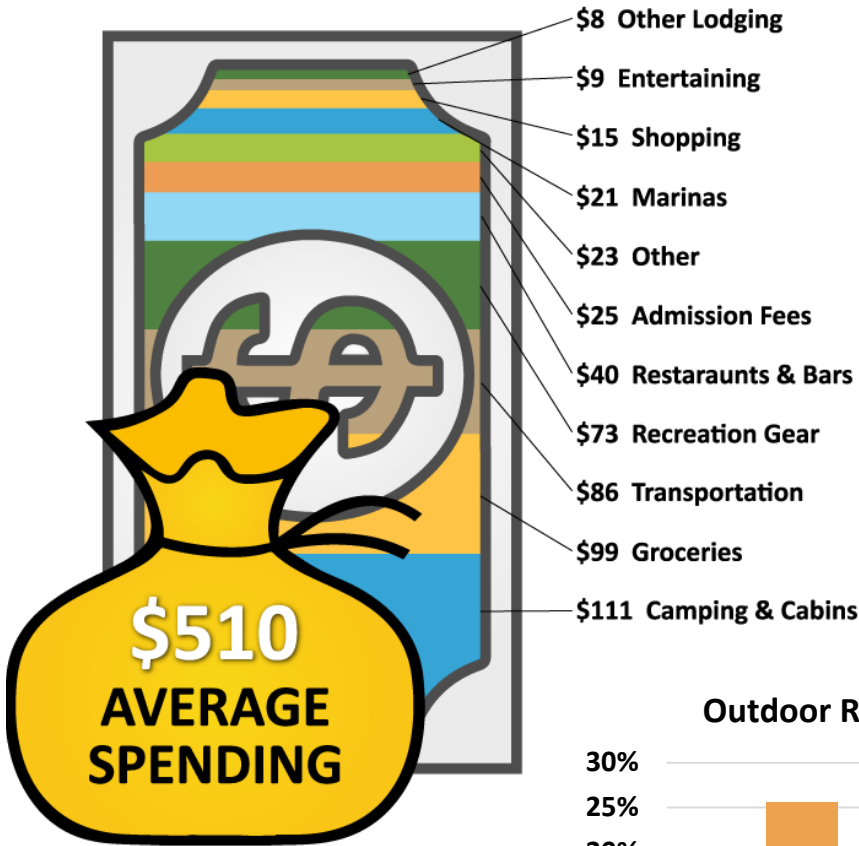
AVERAGE LENGTH OF STAY

Overall Size of Visitors' Parties



AVERAGE GROUP SIZE

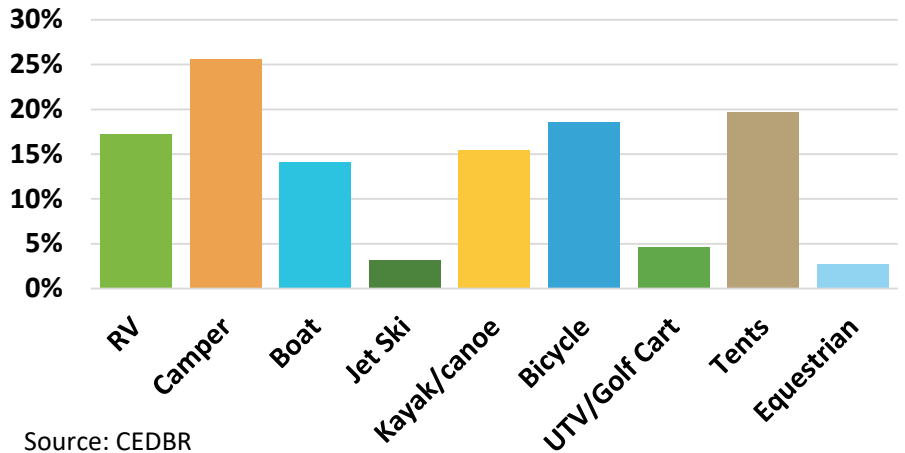
Average Spending by Visitors at Kansas Parks



The average total group spending for a state park trip was \$510 and the single largest expense for the average trip was camping and cabin fees, which averaged \$111. Approximately 75 percent of that spending was within 40 miles of the state park, while the remaining 25 percent was elsewhere in Kansas. Among survey respondents, 60.7 percent reported buying outdoor recreational equipment for use at Kansas state parks. The most common purchase was camping equipment, with 47.7 percent of respondents purchasing at least one tent, RV, or camper.

When asked about increasing fees to improve state park facilities, 64.4 percent supported the increase, though respondents were dividing on which fees they would prefer were increased. The highest support was for increased park entrance fees, at 29.7 percent, and increased camping fees, at 28.3 percent.

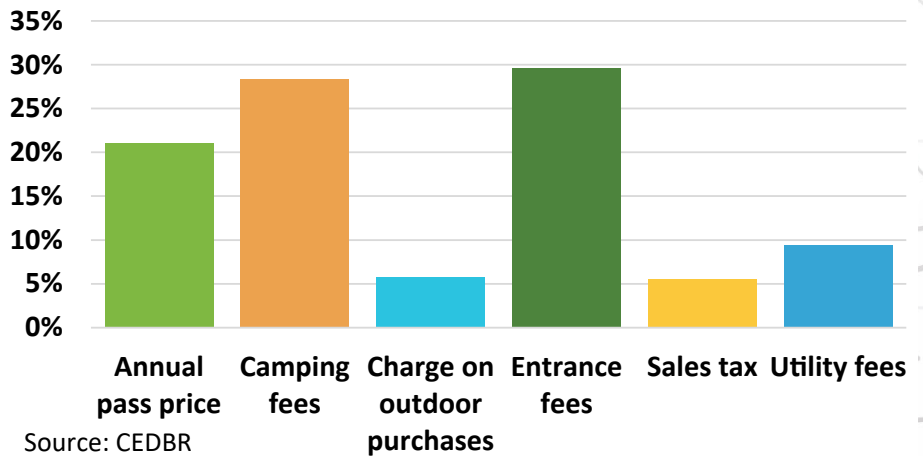
Outdoor Recreational Equipment Investment



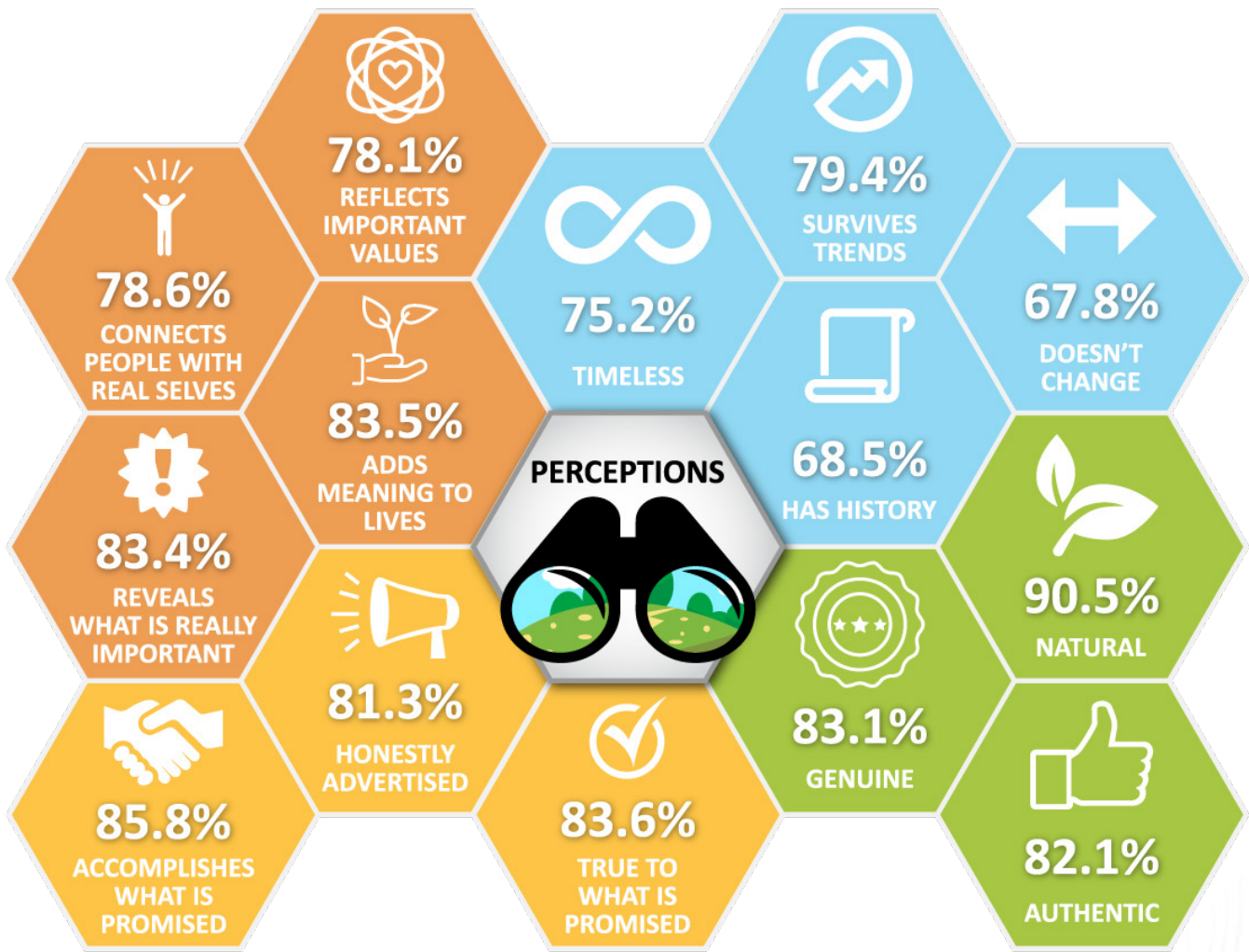
SUPPORT FOR INCREASED FEES



Overall Preferred Fee Increase

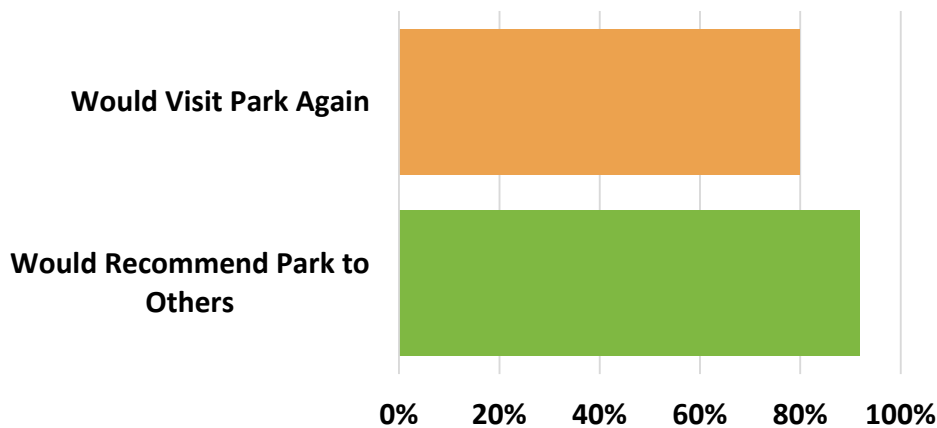


KANSAS | VISITORS SURVEY RESULTS (CONTINUED)



*Values indicate somewhat to strongly agree
 **N= 8,397
 Source: CEDBR survey 2020

Overall Visitor Satisfaction



Source: CEDBR

Survey respondents were, on average, quite satisfied with their trips to Kansas state parks; 91.9 percent of respondents would recommend the park to other potential visitors, and 79.9 percent were likely to visit the same state park again within 12 months. Respondents had generally positive perceptions of state parks, with at least two-thirds agreeing with each of the perception categories included in the survey. The most strongly held perceptions were that state parks are natural places that accomplish what they promise, and places that add meaning to people's lives.

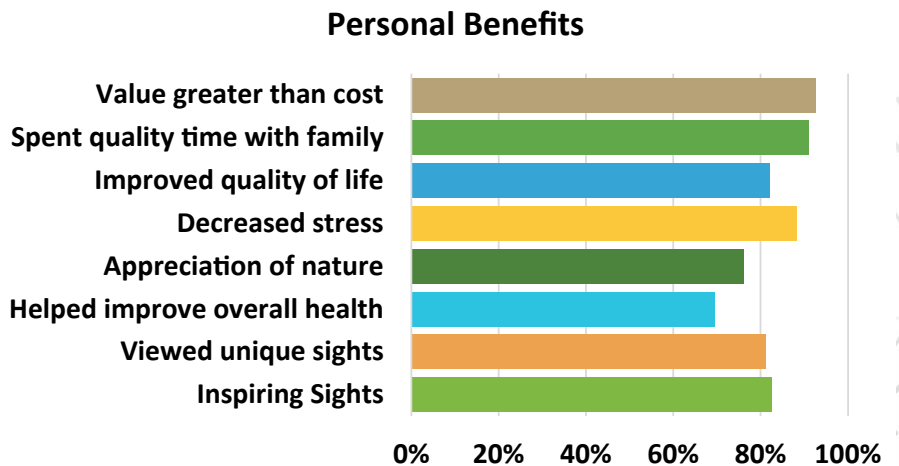
KANSAS | VISITORS SURVEY RESULTS (CONTINUED)



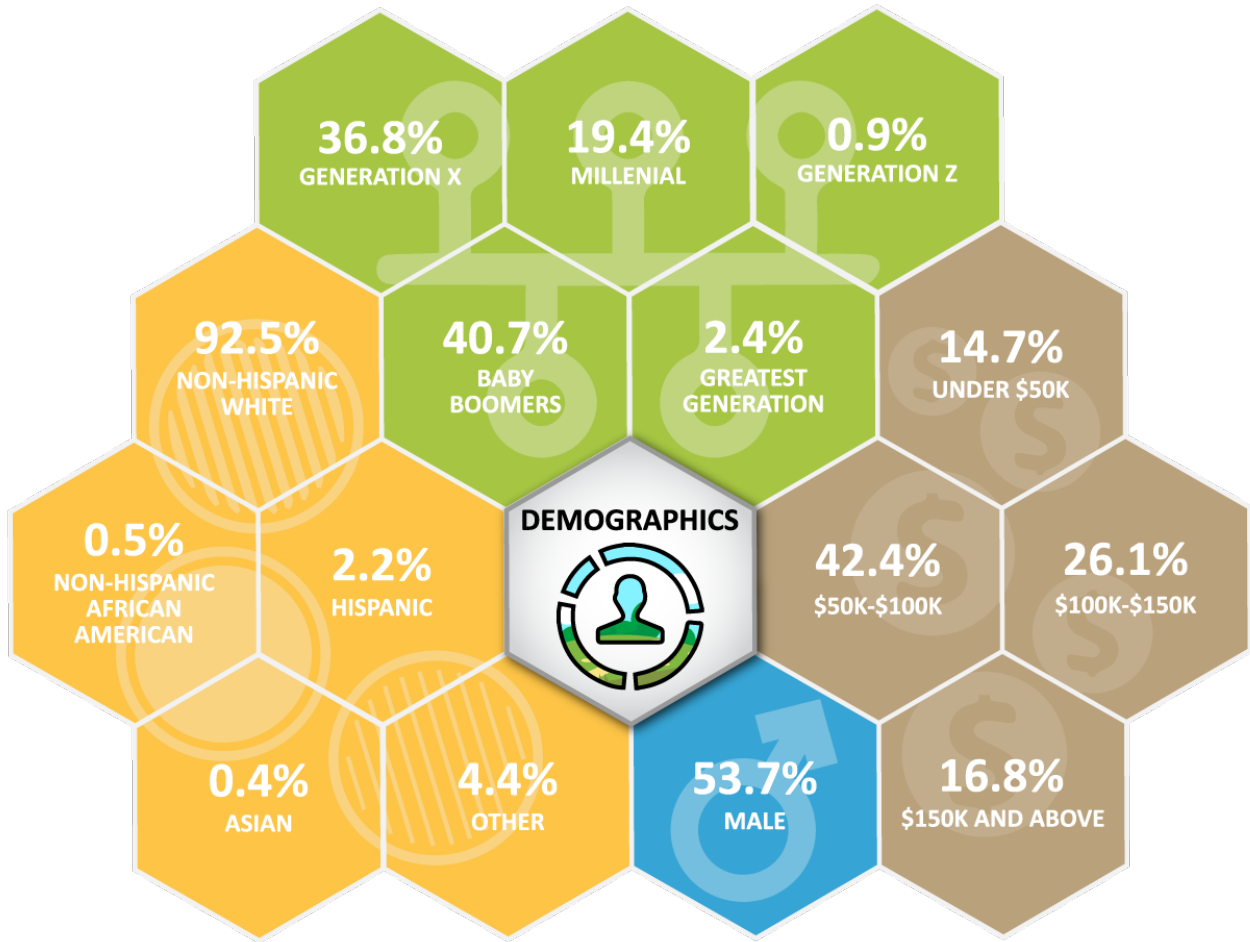
Less than 8 percent of respondents believed the value they received from their visit to a state park was less than its cost, another sign of the high level of satisfaction visitors had with the parks. The two most common benefits respondents received from their visits were spending quality time with their families, and decreasing their stress levels, with 82 percent reporting their trip increased their quality of life. These benefits were consistent across all generations of visitors to the park, with 90 percent or more each of Baby Boomers, Generation X, and Millennials getting more value from their trip than the cost.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	82%	84%	82%
Viewed unique sights	80%	83%	81%
Helped Improve Overall Health	68%	73%	69%
Appreciation of nature	76%	78%	76%
Decreased stress	87%	92%	88%
Improved Quality time with Family	80%	85%	82%
Spent quality time with family	90%	93%	91%
Value greater than cost	92%	94%	93%

Source: CEDBR



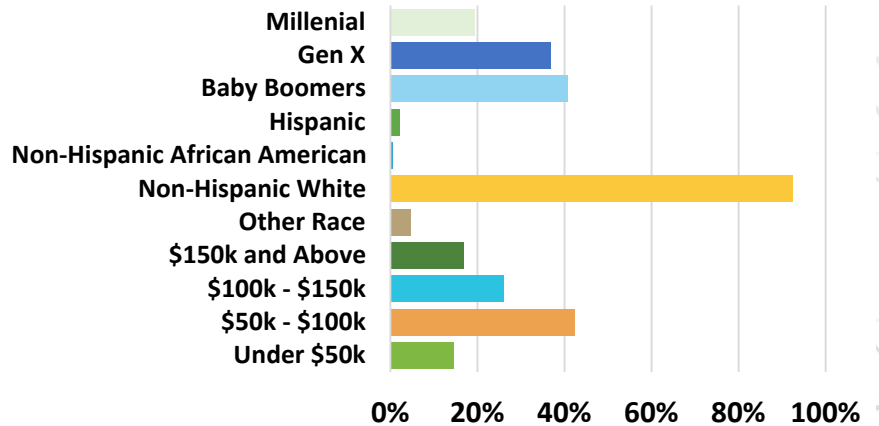
KANSAS | VISITORS SURVEY RESULTS (CONTINUED)



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

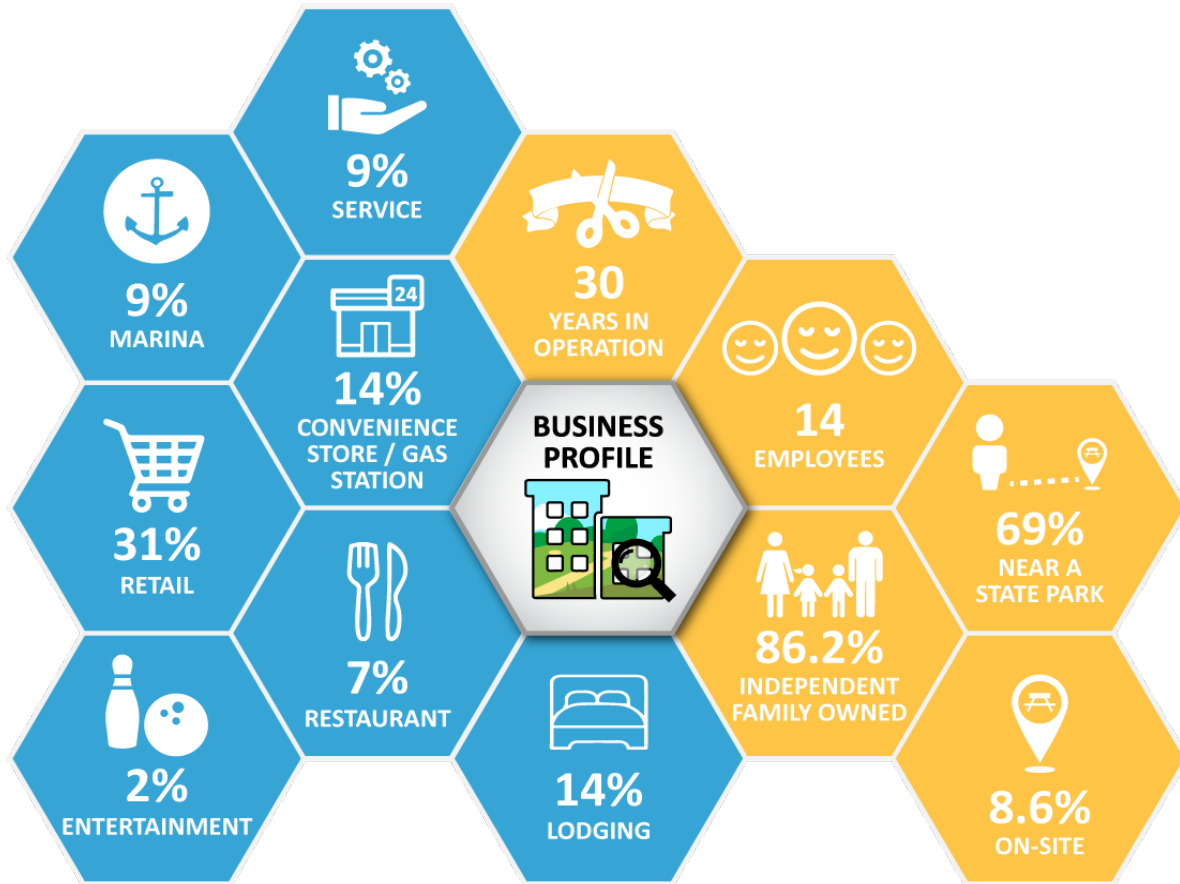
Kansas state parks attracted a wide variety of visitors of different generations, ethnicities, and income levels. Baby Boomers were the largest generation among respondents, comprising 40.7 percent, and the respondents' average age was 52 years old in 2020. More than 7 percent of respondents identified people of color, with 2.2 percent identifying as Hispanic and less than 1 percent identifying as either African American or Asian. Respondents of all income levels attended the parks; 57.2 percent had annual incomes of less than \$100,000, while 16.8 percent reported an income of greater than \$150,000.

Visitor Demographics



Source: CEDBR

KANSAS | VENDORS SURVEY RESULTS



*N=101
Source: CEDBR survey 2021

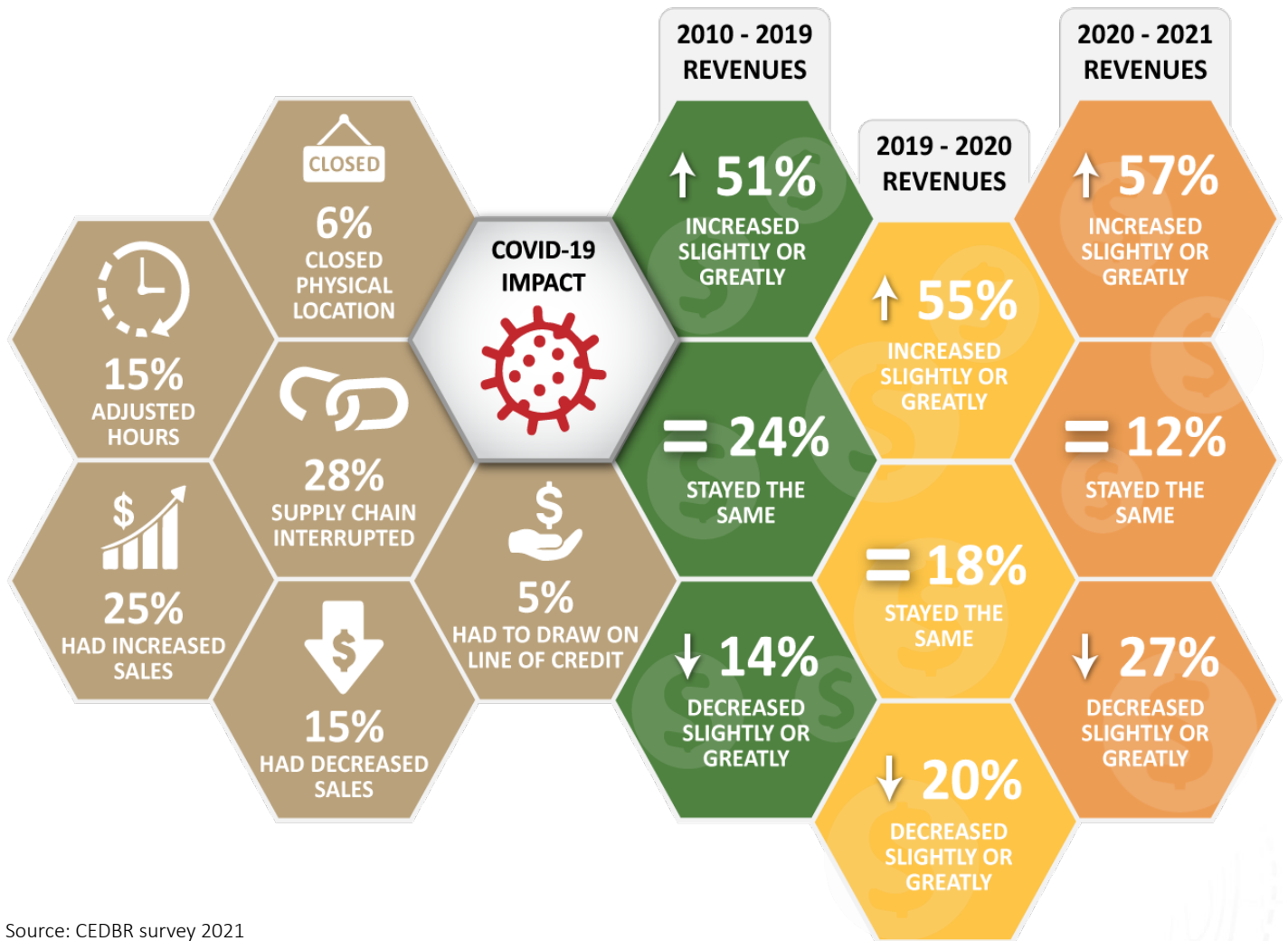
Kansas State Parks are interconnected with businesses that provide services and goods. The vendors support the parks directly by improving the state parks with materials and indirectly by providing resources for guests to engage the state parks. This study surveyed vendors supplied by each of the state parks. The profile of respondents included establishments like retail, lodging, and convenience stores.

The average or typical vendor had 14 employees (full and part-time), was independently owned, and was within ten miles of a state park. When asked about the importance of park services on their revenue, the top two were camping and family time. Fishing, boating, special events, and hiking/biking were all highly ranked, even though they were not in the top two spots. It is important to note that although equestrian and other activities were ranked lower, this does not mean that they are not valuable revenue generators for some vendors within the state.



Source: CEDBR

KANSAS | VENDORS SURVEY RESULTS (CONTINUED)



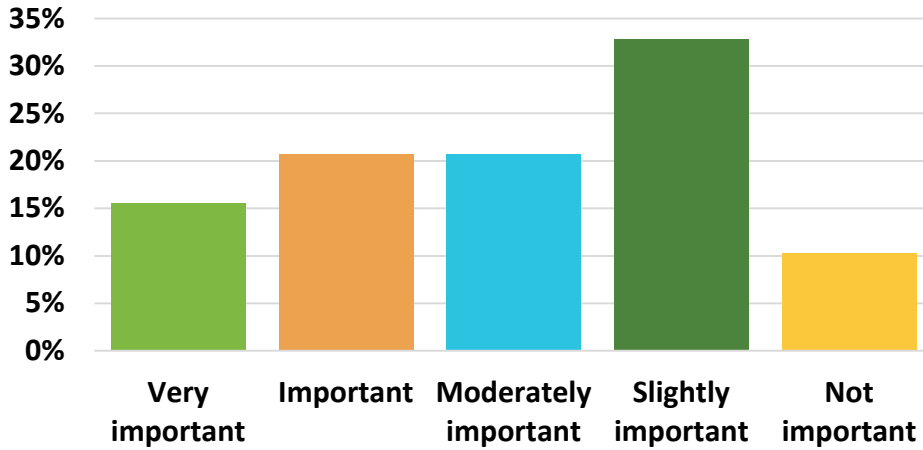
Source: CEDBR survey 2021

Prior to the pandemic, fifty-one percent of the businesses indicated that revenues were increasing, while twenty-four percent said that they were flat. As the vendors entered 2020, the impact of COVID-19 varied widely and depended more on the sector than the physical location or any specific park. When asked about the coronavirus’ effect on revenue, fifty-five percent indicated a positive increase, four percentage points higher than the pre-pandemic timeframe. This does not mean there were no disruptions, as twenty percent of the respondents had a decline in retail sales, as compared to only fourteen percent of respondents in 2019.

The vendors were asked to describe how COVID-19 impacted their operations. Twenty-eight percent indicated they had supply chain issues, five percent had to draw on a line of credit, and fifteen percent adjusted their hours of operations. The adjustments were critical to deal with either the sudden decline or increase in demand.

The outlook for 2021 is both more optimistic and pessimistic for the respondents of the vendor survey. Fifty-seven percent indicated that revenues would increase, two percentage points higher, and twenty-seven percent expect declines. Although there was a higher share with a negative outlook, this is likely a reflection of slowing growth from the unexpected bump in 2020.

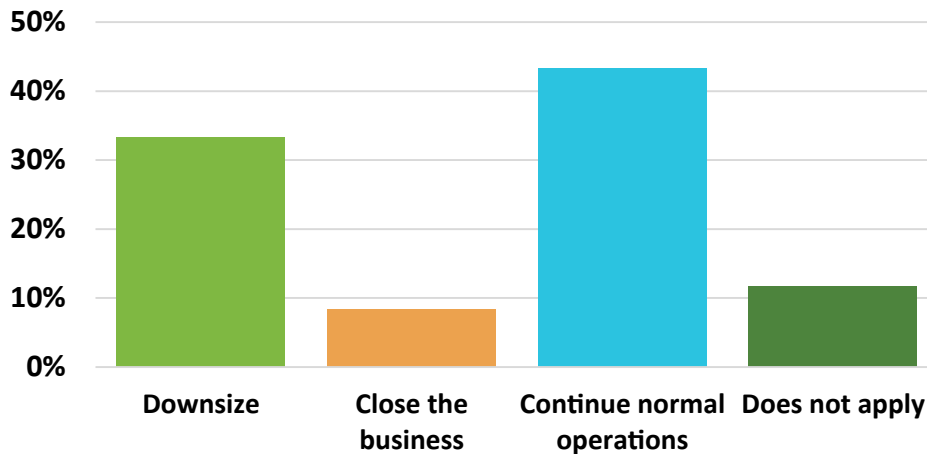
Revenue Dependency



Source: CEDBR

The same businesses were asked about their dependency on the state parks as a source of revenue. More than half of the respondents (57%), indicated that the parks were between moderately to very important. Another thirty-three percent of the respondents stated that they were slightly important, as the business primarily served a local-regional market.

If a state park closed, the impact would be...



Source: CEDBR

To further understand the importance of the state parks, the same vendors were asked a hypothetical question about the impact of a park closing on their finances and long-term viability. Just over forty-three percent stated that they would continue, as their primary business was to a local community by providing items like groceries and gasoline. However, an overwhelming number, forty-five percent of the respondents, indicated that they would close, downsize, or relocate.

CEDAR BLUFF STATE PARK | TREGO COUNTY

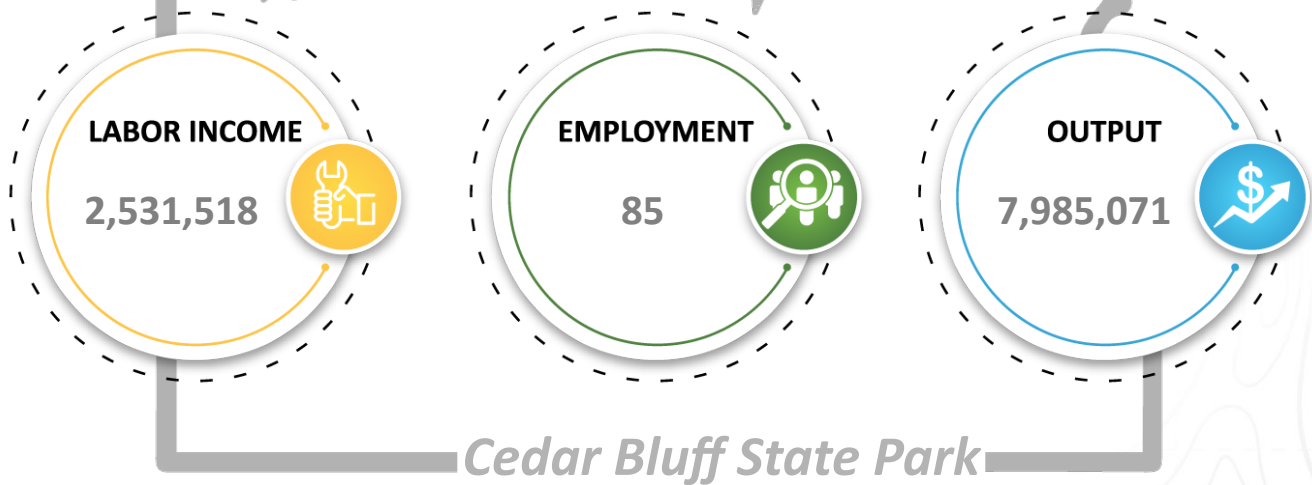
Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT 	INDIRECT 	INDUCED 	TOTAL
LABOR	\$189,893	\$2,044,660	\$296,963	\$2,531,518
EMPLOYMENT	4	75	7	85
OUTPUT	\$97,254	\$6,694,924	\$1,192,894	\$7,985,071

Source: CEDBR

CEDAR BLUFF STATE PARK | TREGO COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$2,139	-	\$10,478
Mining		\$6,064	0	\$99,912
Construction		\$7,938	-	\$34,500
Manufacturing		\$10,745	-	\$199,002
TIPU		\$218,871	4	\$1,403,292
Trade		\$1,067,210	48	\$2,901,778
Service		\$1,161,836	33	\$3,215,654
Government		\$56,716	0	\$120,454
Total		\$2,531,518	85	\$7,985,071

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$408,998	\$460,506	\$29,897	\$49,354	\$6,171
2020	\$456,882	\$498,280	\$34,621	\$55,623	\$6,902

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,544,120	\$987,396	\$1,608,794	\$1,244,761
Employment	57	28	75	37
Output	\$5,625,636	\$2,359,433	\$5,746,443	\$2,875,074

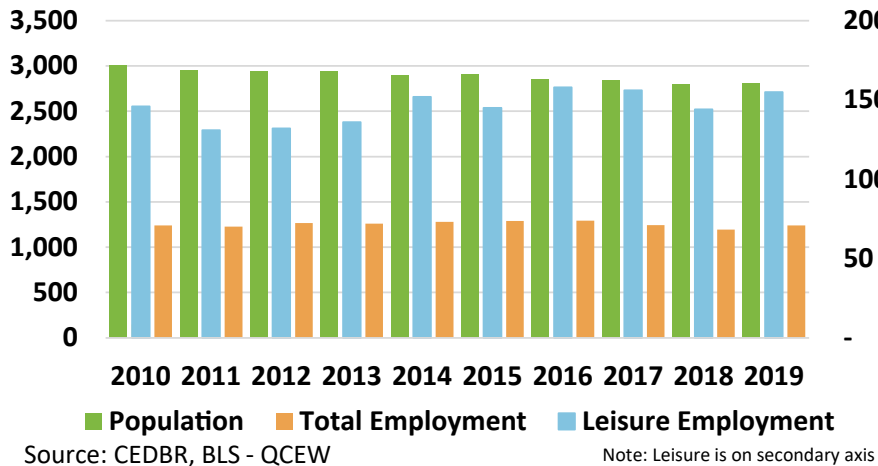
Source: CEDBR

Market Data

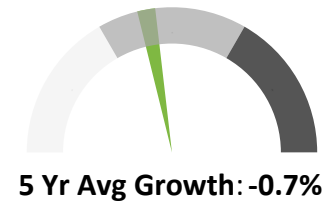
TREGO COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	2,793	2,803	0.4%	-0.7%	15
Total Employment	1,194	1,240	3.9%	-0.6%	17
Leisure & Hospitality Employment	144	155	7.6%	0.4%	12
Leisure & Hospitality Share	12.1%	12.5%	0.4%	1.0%	8
Average Annual Wage (All Industries)	\$34,792	\$34,517	-0.8%	1.0%	22
Average Annual Wage (Leisure & Hosp)	\$27,919	\$28,189	1.0%	2.5%	16
L&H Employment Location Quotient	1.29	1.34	3.8%	0.4%	5

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

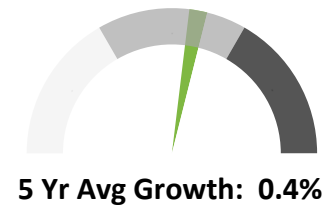
Trego Employment



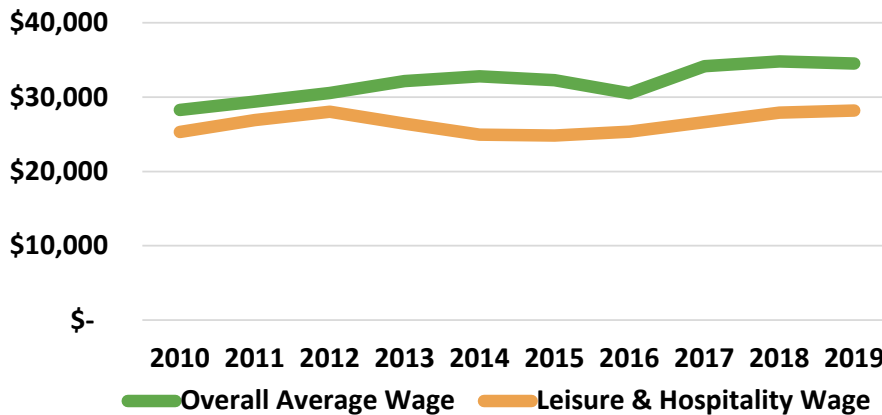
Total Population



Leisure Employment



Trego Average Wages



Average Leisure Wages



TREGO COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$36,498,947	\$39,580,180	8.4%	-0.5%	21
Leisure & Hospitality Retail Sales	\$6,734,567	\$5,989,403	-11.1%	0.4%	16
Per Capita Retail Sales	\$13,068.01	\$14,120.65	8.1%	0.2%	20
Per Capita L&H Retail Sales	\$2,411.23	\$2,136.78	-11.4%	1.1%	13
County Pull Factor (All Sales)	1.01	0.87	-14.4%	-4.5%	23
County Pull Factor (L&H Sales)	1.23	1.28	3.7%	1.6%	13

*1 Ranking based on 26 state park areas
Source: CEDBR, Kansas Department of Revenue*



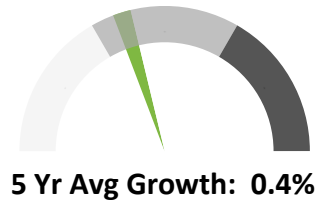
Note: Leisure is on secondary axis

Cedar Bluff’s market area was the second smallest among Kansas state park market areas in 2019 with a population of 2,803, following a population decline of approximately 100 residents from 2014 to 2019. Total employment decreased at a similar rate, but leisure and hospitality employment remained robust, growing 2 percent. The area had the second-highest share of leisure and hospitality employment in 2019, at 12.5% of total employment. At \$28,199, the Cedar Bluff market had the highest average annual leisure and hospitality wages of any park. The area also had an out-sized pull factor for leisure and hospitality retail sales of 1.28, indicating sales per capita were more than a quarter higher than the state average.

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)

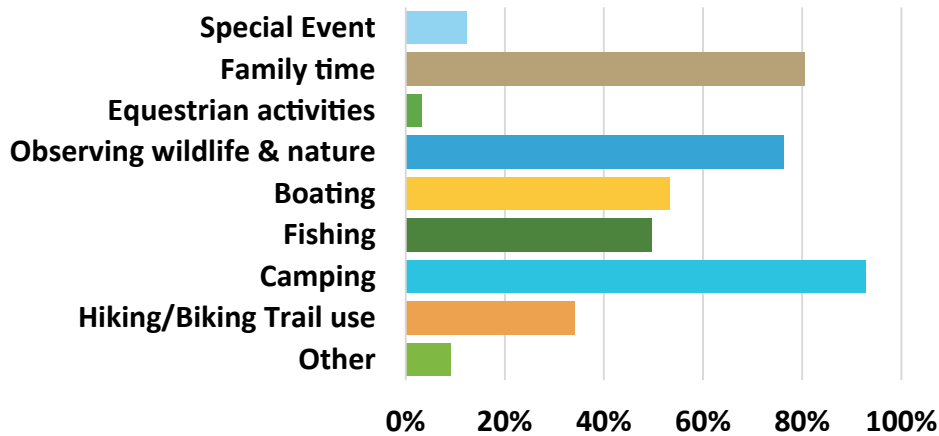


County Pull Factor (L&H)



Visitor Survey

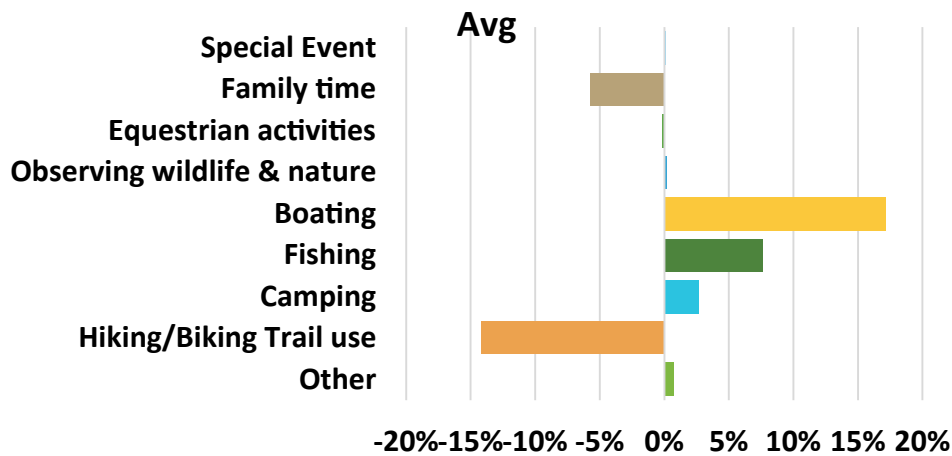
Park Visitor Activities



Camping was the most popular activity at Cedar Bluff State Park, with more than 92 percent of respondents reporting camping on their most recent visit to the park. More than half of respondents went boating at Cedar Bluff, 17.2 percentage points higher than the average for all state parks.

Source: CEDBR

Park Visitor Activities Relative to State



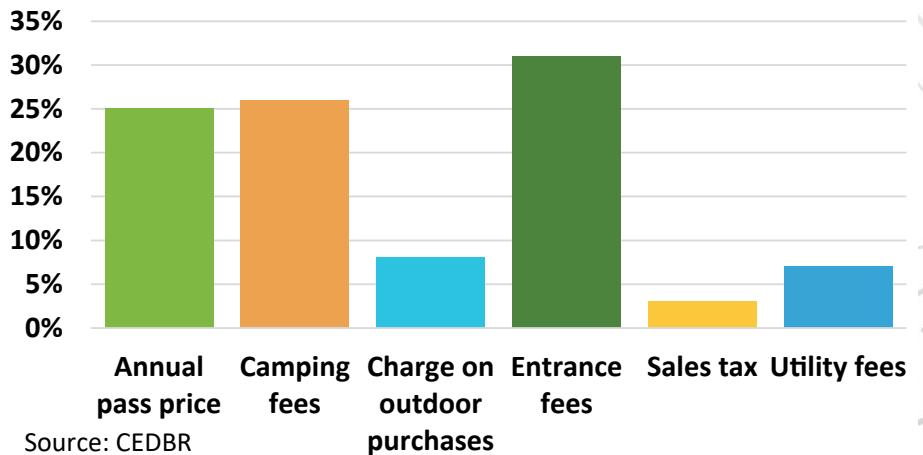
Hiking and cycling were less common activities than at other state parks; respondents at Cedar Bluff were 14.2 percentage points less likely to engage in those activities than average.

Source: CEDBR

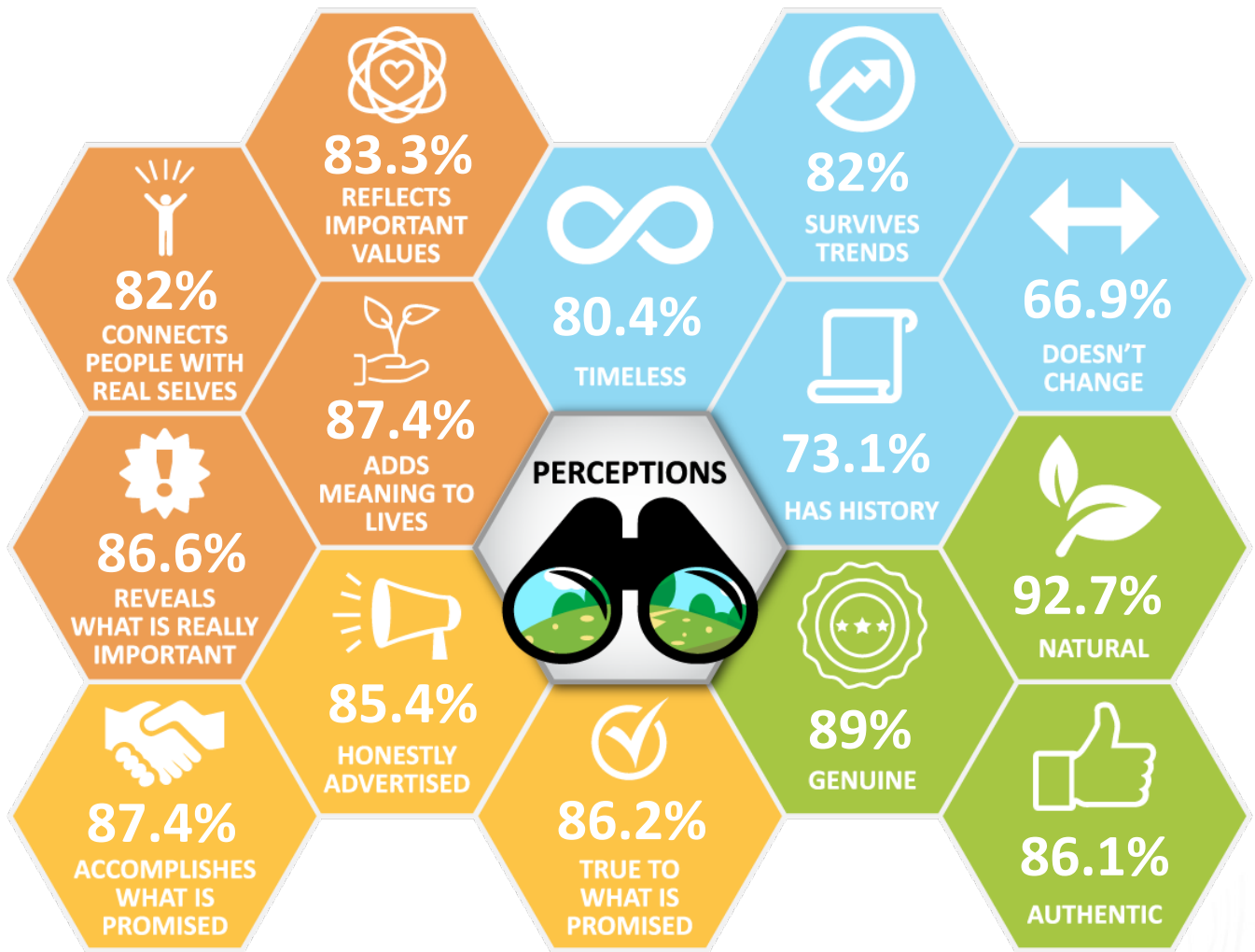
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



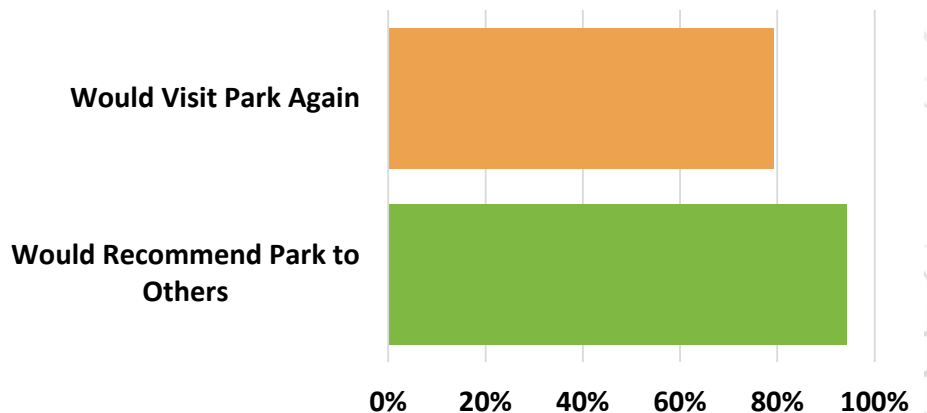
Source: CEDBR



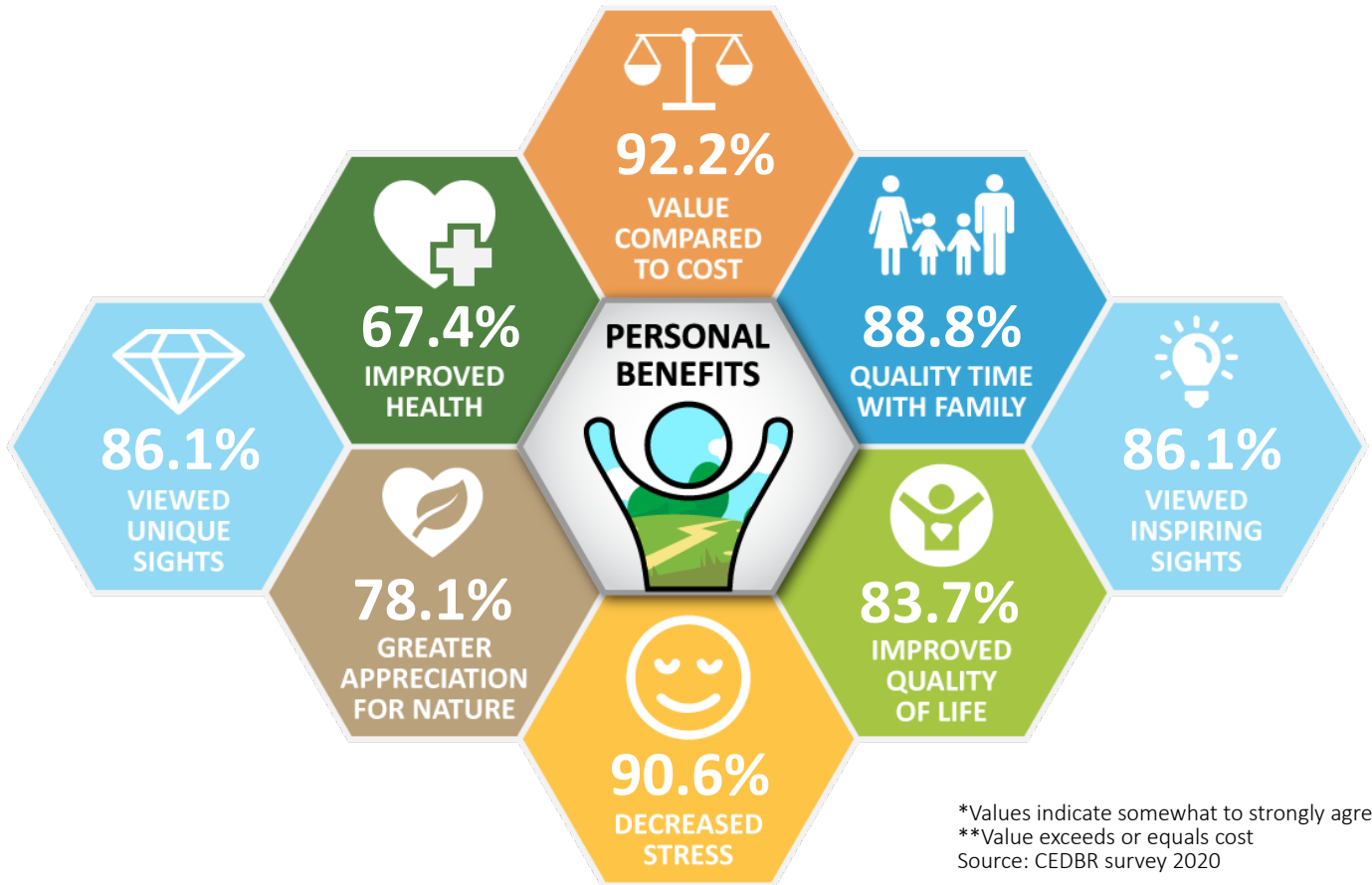
*Values indicate somewhat to strongly agree
 **N= 357
 Source: CEDBR survey 2020

Of survey respondents who visited Cedar Bluff State Park, 94.3 percent would recommend the park to other potential visitors, a rate 2.4 percent higher than the state park system average. Almost four in five respondents were likely to revisit the park themselves within the next year, both signs of highly satisfied visitors. Some common perceptions included that the park was natural, authentic, and that it added meaning to people’s lives, all of which were reported at rates 2 percentage points higher than the statewide average.

Park Visitor Satisfaction



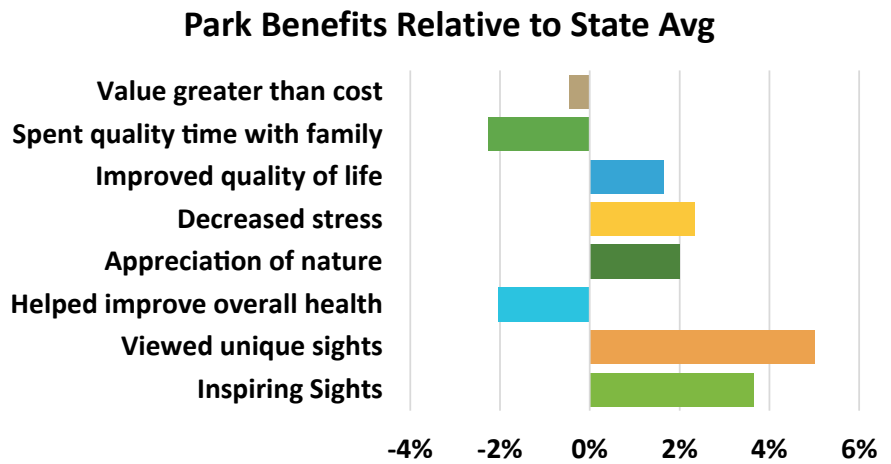
Source: CEDBR

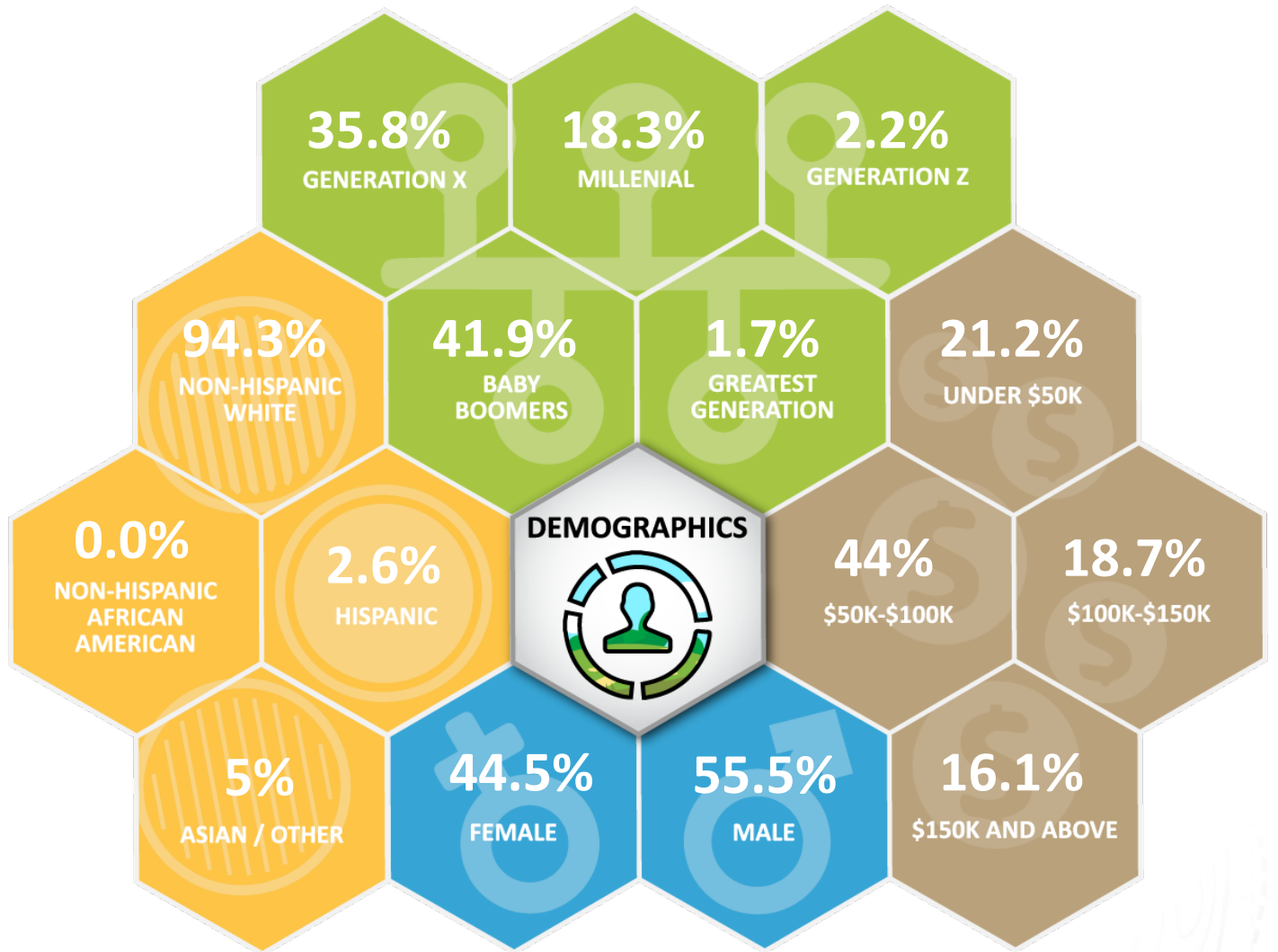


More than 92 percent of survey respondents who visited Cedar Bluff State Park found the value of their visit to be greater than or equal to the cost, a rate only 0.5 percentage points below the state park system average. This rate was highest among Millennials, at 92.9 percent, and lowest among members of Generation X, at 91.5 percent. The personal benefit gained by the smallest share of Cedar Bluff visitors was improving overall health, by 67.4 percent of respondents, a rate 2.3 percentage points below the state average.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	88%	88%	81%
Viewed unique sights	88%	88%	81%
Helped Improve Overall Health	66%	66%	71%
Appreciation of nature	75%	80%	79%
Decreased stress	86%	98%	90%
Improved Quality time with Family	84%	83%	83%
Spent quality time with family	83%	96%	90%
Value greater than cost	93%	91%	93%

Source: CEDBR

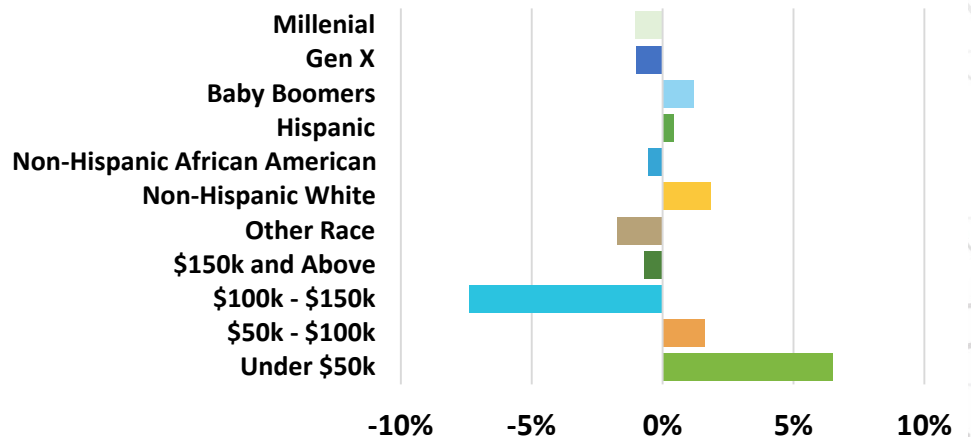




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Cedar Bluff State Park’s survey respondents tended to be younger, lower-income, and fewer people of color than the average state park. The share of Cedar Bluff respondents who earned less than \$100,000 was 8.1 percentage points higher than average, while the share of non-Hispanic white respondents was 1.8 percentage points higher than average. The average age of Cedar Bluff respondents was 51 years old, while the average for the overall park system was 52 years old.

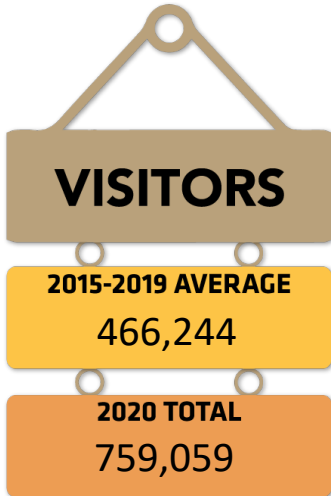
Park Visitor Demographics Relative to State Avg



Source: CEDBR

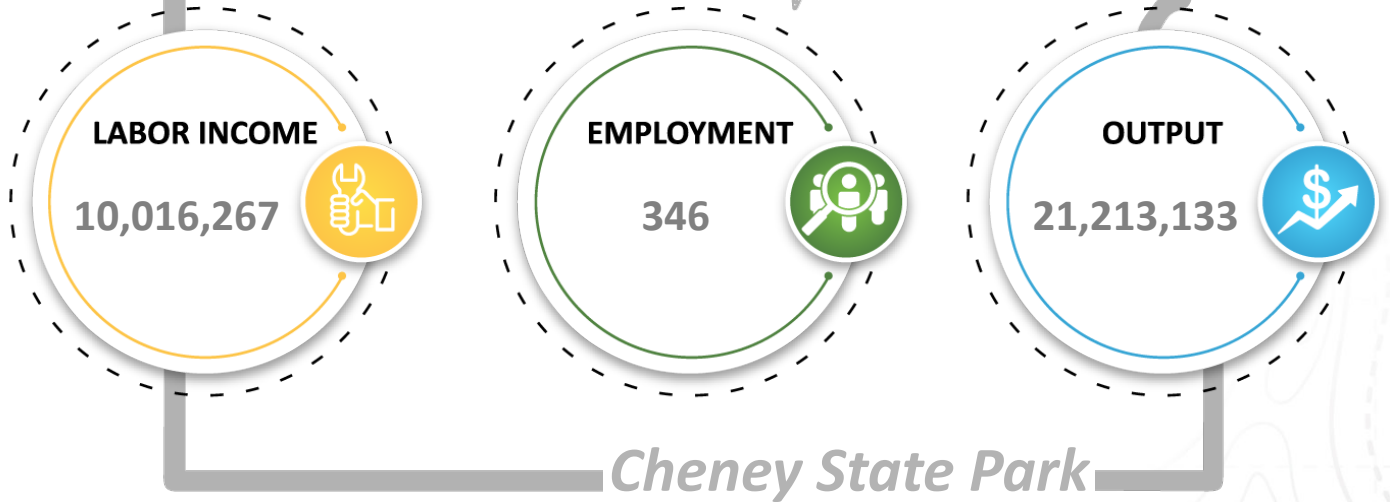
CHENEY STATE PARK | KINGMAN COUNTY

Economic Impact



*Visitor Days









Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$282,828	\$8,060,271	\$1,673,171	\$10,016,267
EMPLOYMENT	6	298	41	346
OUTPUT	\$246,075	\$15,200,684	\$5,766,381	\$21,213,133

Source: CEDBR

CHENEY STATE PARK | KINGMAN COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION			
INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$5,617	-	\$29,659
Mining 	\$11,269	0	\$158,084
Construction 	\$38,065	1	\$140,425
Manufacturing 	\$53,044	1	\$565,779
TIPU 	\$546,817	12	\$3,311,313
Trade 	\$5,866,866	229	\$6,736,261
Service 	\$3,384,930	101	\$10,084,668
Government 	\$109,659	2	\$186,945
Total	\$10,016,267	346	\$21,213,133

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$1,678,401	\$1,608,772	\$150,023	\$213,267	\$24,504
2020	\$2,723,791	\$2,610,463	\$243,477	\$344,534	\$39,416

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$7,586,649	\$2,429,623	\$11,987,075	\$3,946,241
Employment	272	73	433	119
Output	\$15,542,649	\$5,670,487	\$24,656,195	\$9,199,367

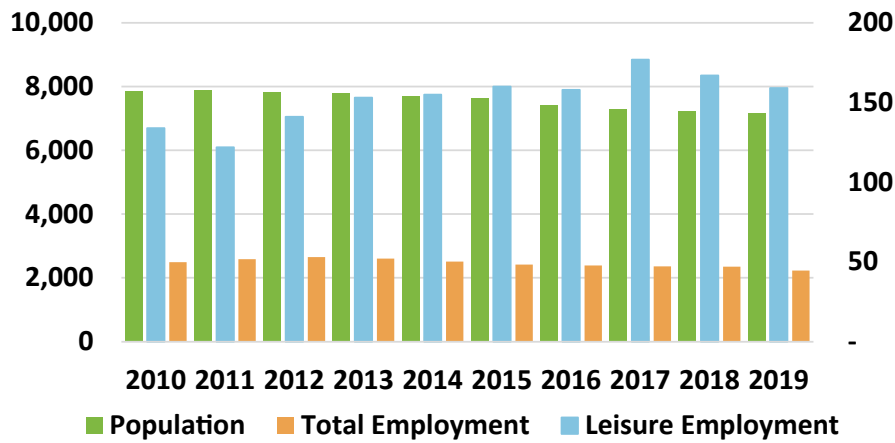
Source: CEDBR

Market Data

KINGMAN COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	7,310	7,152	-2.2%	-1.5%	24
Total Employment	2,354	2,233	-5.1%	-2.4%	22
Leisure & Hospitality Employment	167	159	-4.8%	0.5%	11
Leisure & Hospitality Share	7.1%	7.1%	0.0%	2.9%	4
Average Annual Wage (All Industries)	\$35,112	\$35,732	1.8%	1.1%	21
Average Annual Wage (Leisure & Hosp)	\$9,769	\$10,857	11.1%	2.1%	18
L&H Employment Location Quotient	0.76	0.76	0.5%	2.3%	3

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Kingman Employment



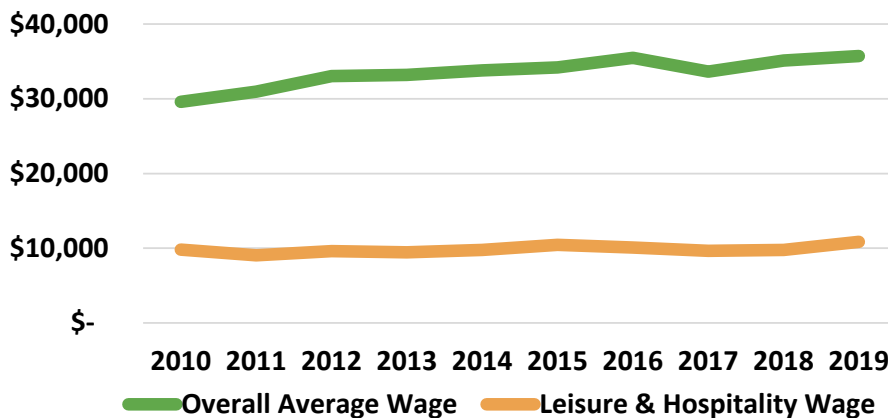
Total Population



Leisure Employment



Kingman Average Wages

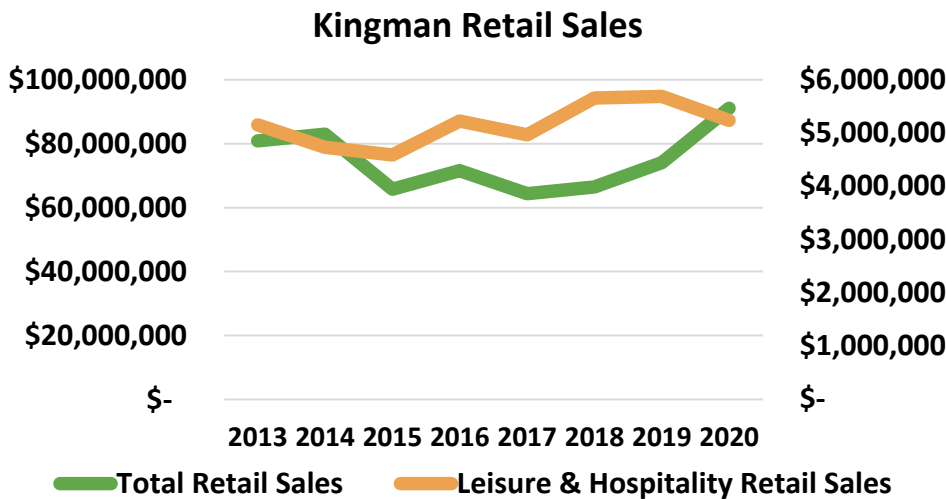


Average Leisure Wages



KINGMAN COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$74,085,415	\$91,128,945	23.0%	6.8%	1
Leisure & Hospitality Retail Sales	\$5,690,589	\$5,239,235	-7.9%	2.7%	7
Per Capita Retail Sales	\$10,134.80	\$12,741.74	25.7%	8.3%	1
Per Capita L&H Retail Sales	\$778.47	\$732.56	-5.9%	4.2%	7
County Pull Factor (All Sales)	0.62	0.69	11.4%	-1.9%	18
County Pull Factor (L&H Sales)	0.40	0.44	10.2%	4.7%	7

*1 Ranking based on 26 state park areas
Source: CEDBR, Kansas Department of Revenue*



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Cheney Park’s market area, the 14th-largest Kansas state park market area in terms of population, experienced a population decline of 7.1 percent from 2014 to 2019, the third-fastest rate of decline. The area’s concentration of leisure and hospitality workers grew at the fourth-fastest rate, growing to 7.1 percent of the area’s total employment in 2019. Per capita leisure and hospitality retail sales were \$733 in the area, less than half the state average, a sign that residents may be spending a disproportionate amount of their leisure dollars outside the local area.

Total Taxable Retail Sales



5 Yr Avg Growth: 6.8%

Leisure Retail Sales



5 Yr Avg Growth: 2.7%

County Pull Factor (All)



5 Yr Avg Growth: -1.9%

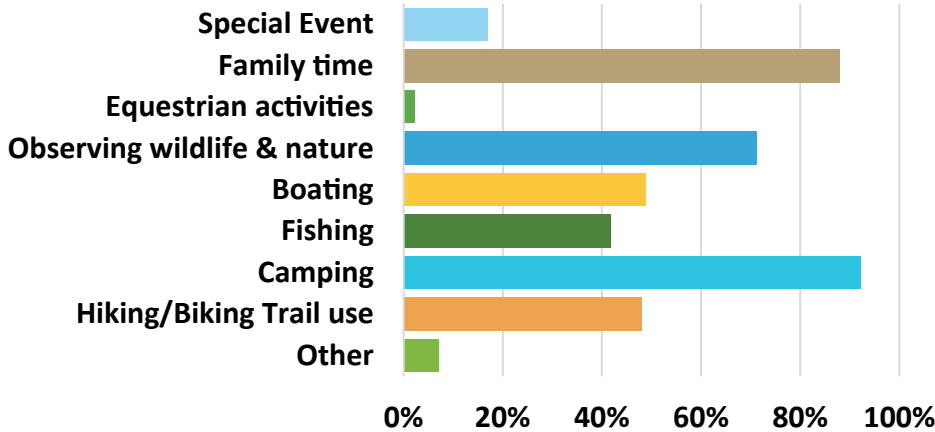
County Pull Factor (L&H)



5 Yr Avg Growth: 4.7%

Visitor Survey

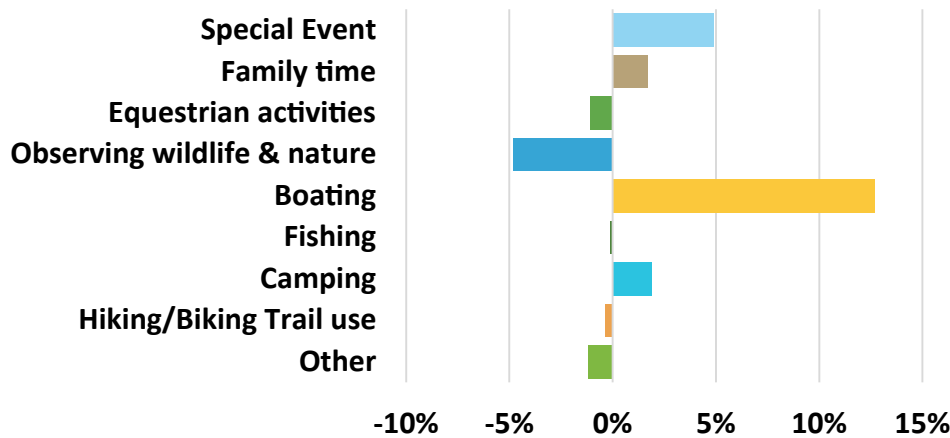
Park Visitor Activities



Source: CEDBR

Boating and special events were the two activities at Cheney State Park most popular relative to the average in the state park system. Respondents were 12.7 and 4.9 percentage points, respectively, more likely to engage in those activities than the state park average.

Park Visitor Activities Relative to State Avg



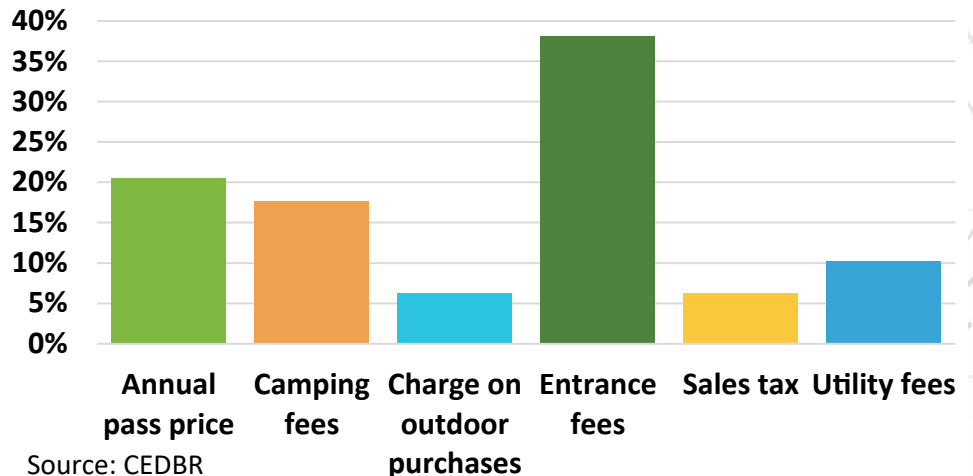
Source: CEDBR

Observing nature had 4.8 percentage points fewer respondents at Cheney than the state average. Support for fee increases to fund increased park services was 5.2 percentage points higher at Cheney than average.

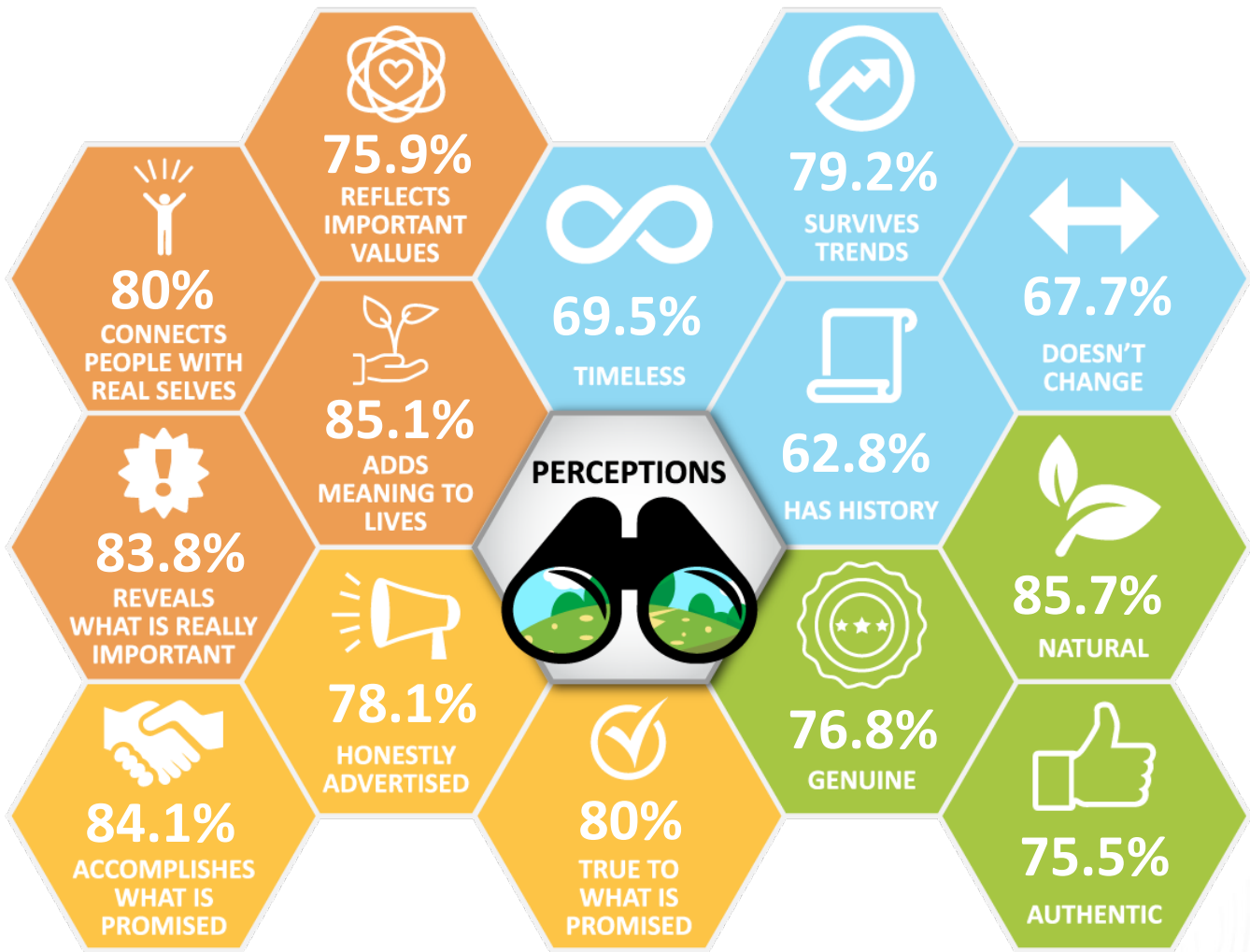
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



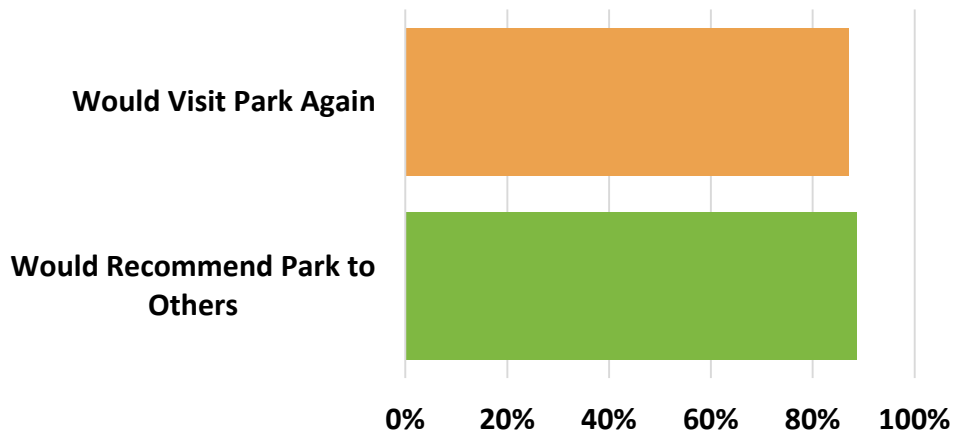
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 570
 Source: CEDBR survey 2020

Cheney State Park’s survey respondents had one of the highest levels of expected return visits to the park in the state, with 87.1 percent of respondents expecting to return to the park within 12 months. In addition, 88.7 percent of respondents would recommend the state park to others. The park drew high marks for perceptions of being natural, adding meaning to people’s lives, and connecting people to their real selves, but had a lower-than-average perception of being timeless.

Park Visitor Satisfaction



Source: CEDBR

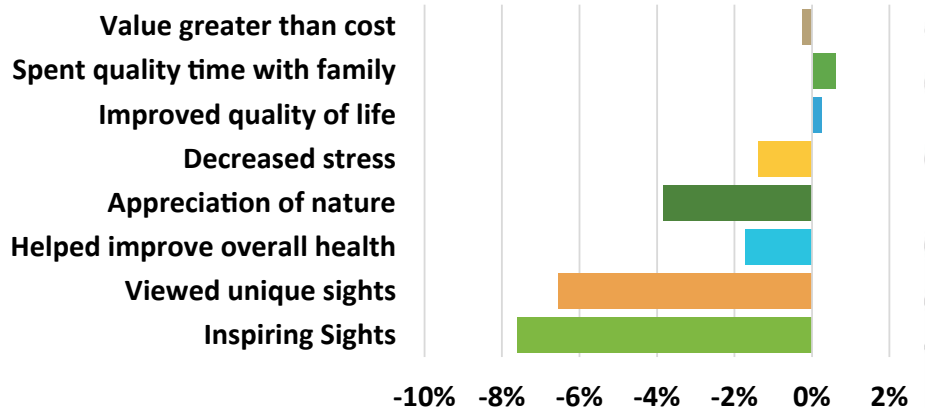


Only 7.5 percent of survey respondents who visited Cheney State Park believed the cost of their visit was higher than the value they received. Only 2.5 percent of Millennial respondents found the cost higher than the value. The most common benefit of visiting the park was spending quality time with family members, which occurred at Cheney at a rate 0.6 percentage points higher than the state average. While three-quarters of respondents believed they viewed inspiring or unique sights, this one of the lowest rates in the state park system, more than six percentage points below average.

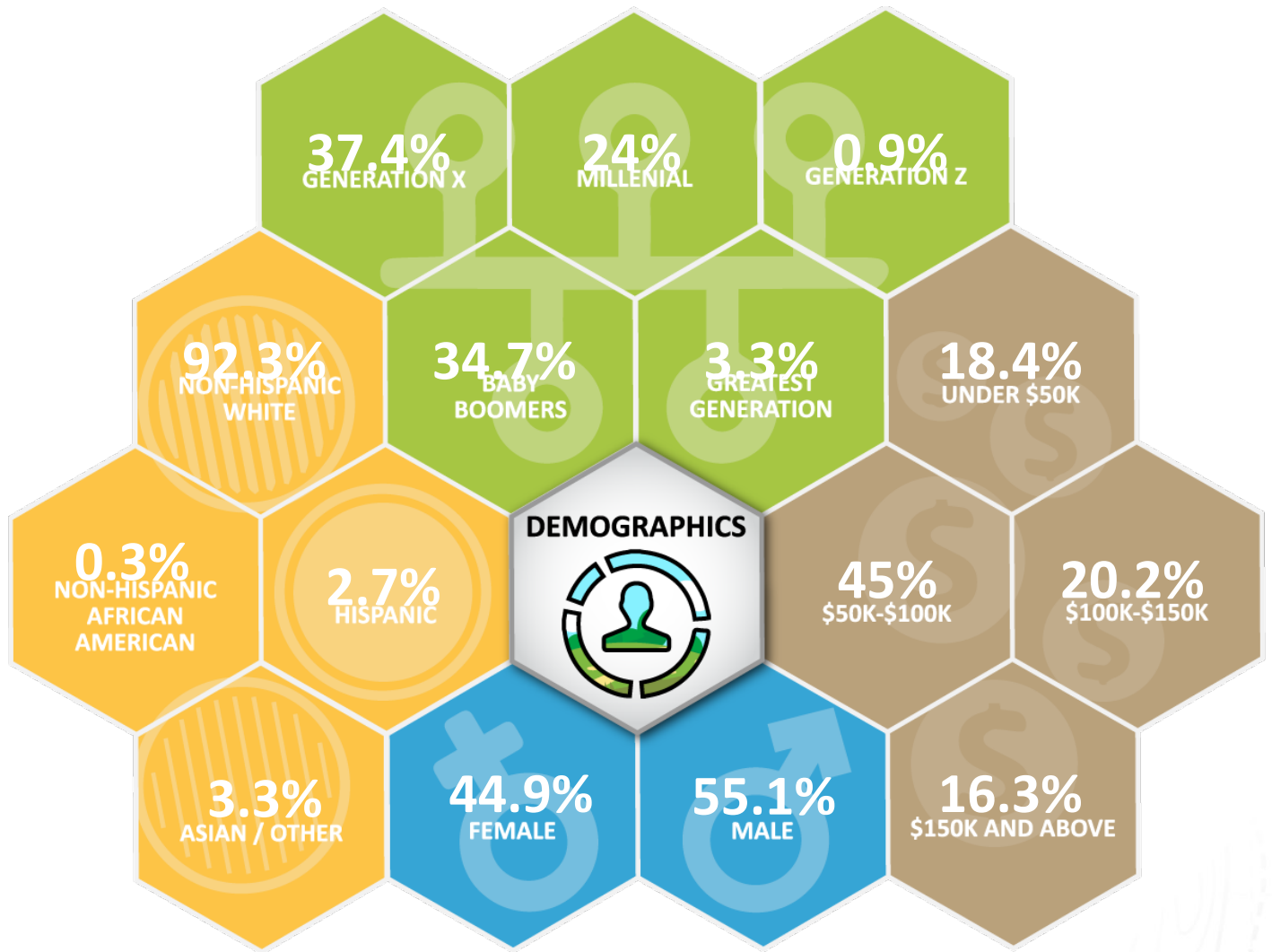
PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	74%	76%	78%
Viewed unique sights	71%	73%	77%
Helped Improve Overall Health	60%	72%	76%
Appreciation of nature	70%	72%	77%
Decreased stress	81%	92%	91%
Improved Quality time with Family	81%	83%	85%
Spent quality time with family	91%	90%	95%
Value greater than cost	91%	91%	97%

Source: CEDBR

Park Benefits Relative to State Avg



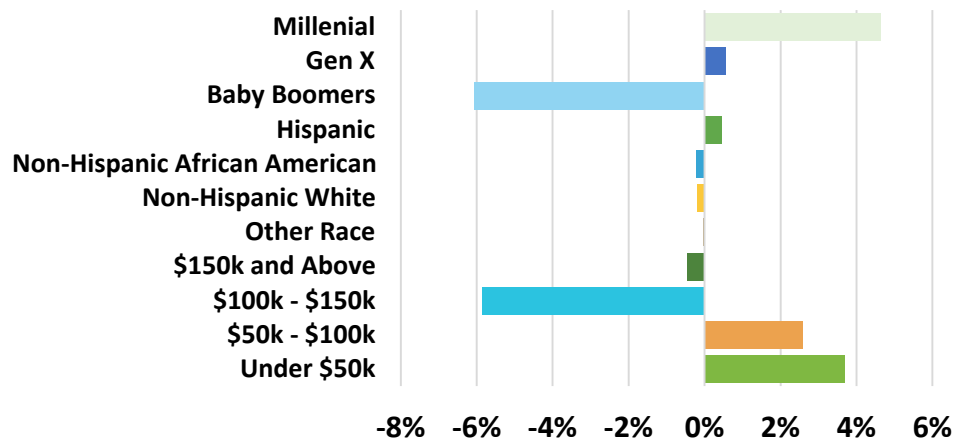
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Cheney State Park were younger than the average state park-goer due to a higher share of Millennials, 5.4 percentage points greater than the overall park system and fourth highest of any state park in Kansas. Cheney’s respondents also tended to be lower-income, with both the share of respondents earning less than \$50,000 and the share earning \$50,000 to \$100,000 each 3 to 4 percentage points higher than average.

Park Visitor Demographics Relative to State Avg



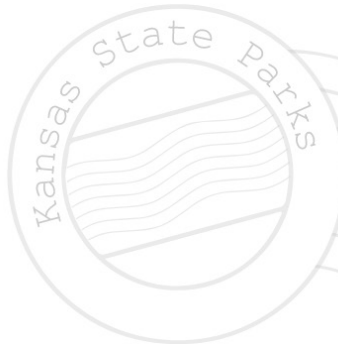
Source: CEDBR

CLINTON STATE PARK | DOUGLAS COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$269,195	\$8,266,516	\$1,677,676	\$10,213,388
EMPLOYMENT	6	292	41	340
OUTPUT	\$239,557	\$16,019,979	\$5,886,813	\$22,146,349

Source: CEDBR

CLINTON STATE PARK | DOUGLAS COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION			
INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$4,502	-	\$18,092
Mining 	\$9,482	0	\$135,713
Construction 	\$47,227	1	\$165,231
Manufacturing 	\$73,431	2	\$626,561
TIPU 	\$586,126	11	\$3,336,951
Trade 	\$5,776,147	220	\$6,577,875
Service 	\$3,583,356	105	\$10,999,240
Government 	\$133,116	2	\$286,686
Total	\$10,213,388	340	\$22,146,349

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$1,815,305	\$1,361,241	\$162,341	\$210,352	\$29,805
2020	\$2,586,263	\$1,939,403	\$231,300	\$299,061	\$42,195

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$7,345,584	\$2,867,808	\$10,202,502	\$4,084,581
Employment	261	79	365	113
Output	\$15,234,556	\$6,911,793	\$21,517,047	\$9,837,560

Source: CEDBR

Market Data

DOUGLAS COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	121,436	122,259	0.7%	1.0%	2
Total Employment	49,203	49,641	0.9%	0.9%	4
Leisure & Hospitality Employment	7,083	7,089	0.1%	1.2%	6
Leisure & Hospitality Share	14.4%	14.3%	-0.1%	0.3%	14
Average Annual Wage (All Industries)	\$39,148	\$40,906	4.5%	2.8%	6
Average Annual Wage (Leisure & Hosp)	\$15,540	\$16,171	4.1%	3.6%	6
L&H Employment Location Quotient	1.54	1.53	-0.6%	-0.3%	11

1 Total Non-institutionalized population
2 Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Douglas Employment



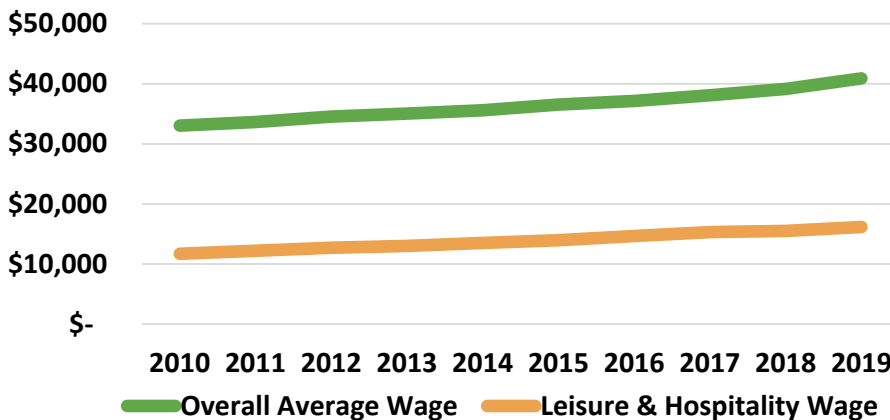
Total Population



Leisure Employment



Douglas Average Wages



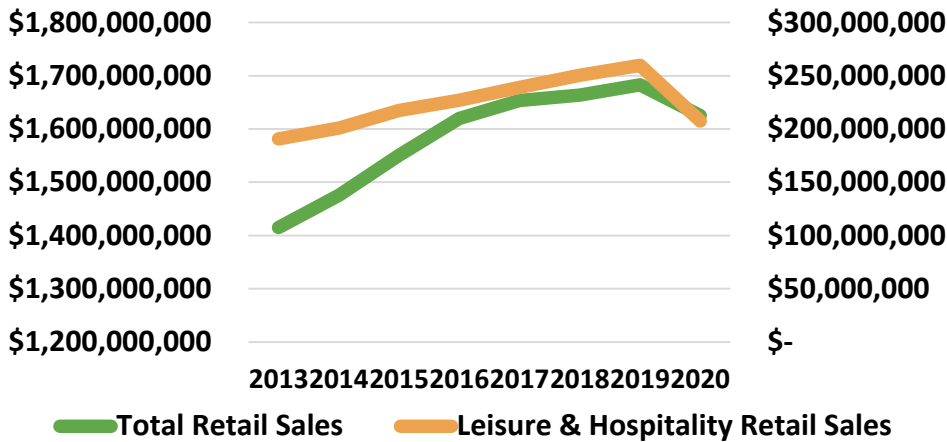
Average Leisure Wages



DOUGLAS COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$1,682,925,234	\$1,625,026,773	-3.4%	0.9%	12
Leisure & Hospitality Retail Sales	\$259,778,046	\$207,611,431	-20.1%	-0.9%	21
Per Capita Retail Sales	\$13,858.54	\$13,291.67	-4.1%	0.0%	22
Per Capita L&H Retail Sales	\$2,139.22	\$1,698.13	-20.6%	-1.8%	25
County Pull Factor (All Sales)	0.93	0.92	-1.7%	0.6%	3
County Pull Factor (L&H Sales)	1.09	1.02	-7.1%	-1.4%	25

*1 Ranking based on 26 state park areas
Source: CEDBR, Kansas Department of Revenue*

Douglas Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: 0.9%

Leisure Retail Sales



5 Yr Avg Growth: -0.9%

County Pull Factor (All)



5 Yr Avg Growth: 0.6%

County Pull Factor (L&H)

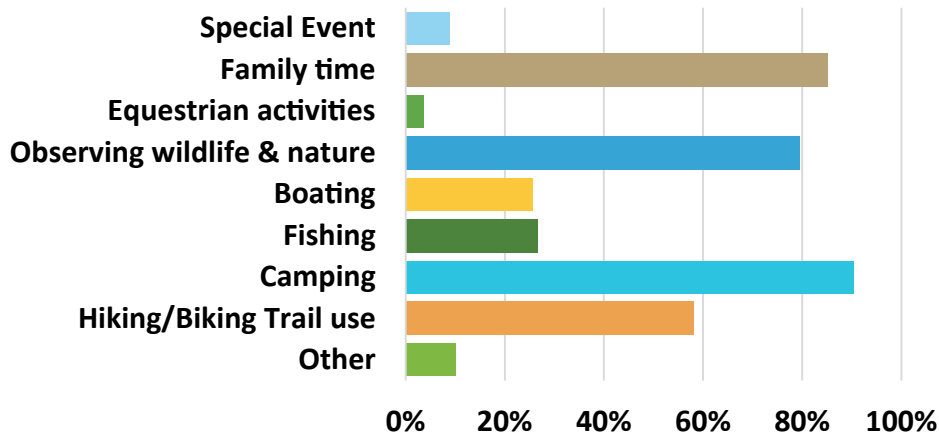


5 Yr Avg Growth: -1.4%

The Clinton Park market area was the second-fastest-growing of Kansas' state park market areas, averaging 1 percent population growth for the past five years, and in terms of retail sales, employment, and population, the area was the second largest. In both average annual overall wages and leisure and hospitality wages, the area's 2019 average was the fourth-highest among state park areas, though those wages were 14.9 and 6.8 percent below the state average, respectively. The leisure and hospitality pull factor of 1.02 in 2020 indicates that, on a per resident basis, the area had hospitality spending 2 percent higher than the state average.

Visitor Survey

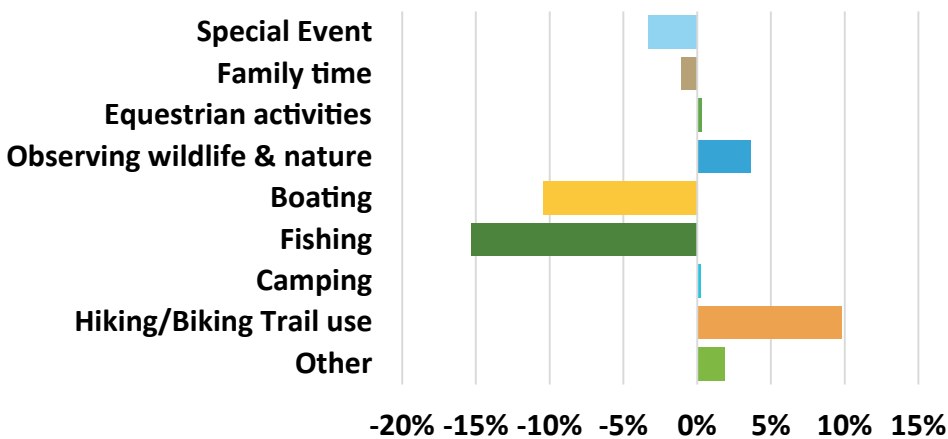
Park Visitor Activities



Camping and family time were the two most popular activities at Clinton State Park, with a strong majority of respondents participating in both. Fishing and boating, both still engaged in by 41.8 and 48.7 percent of respondents, were considerably less popular at Clinton State Park than the state average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



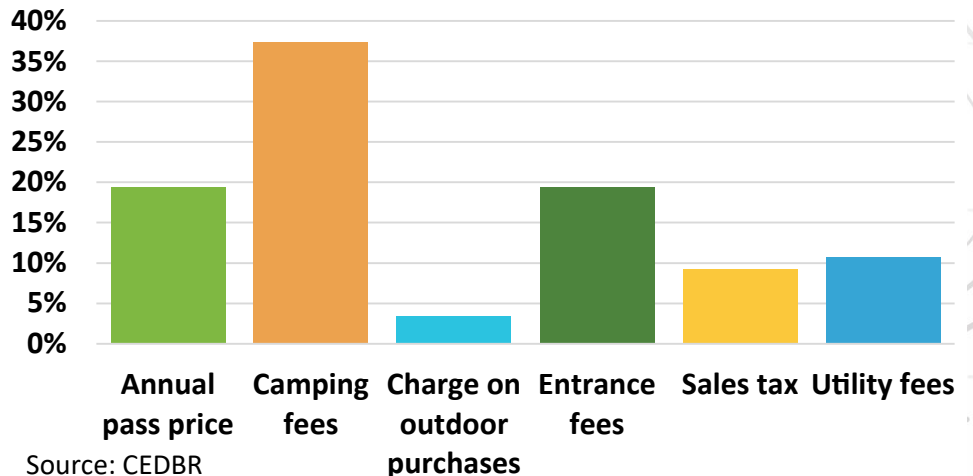
More than two-thirds of respondents from Clinton State Park supported increased fees to fund expanded park services, with strong support for increasing the prices on camping to fund them.

Source: CEDBR

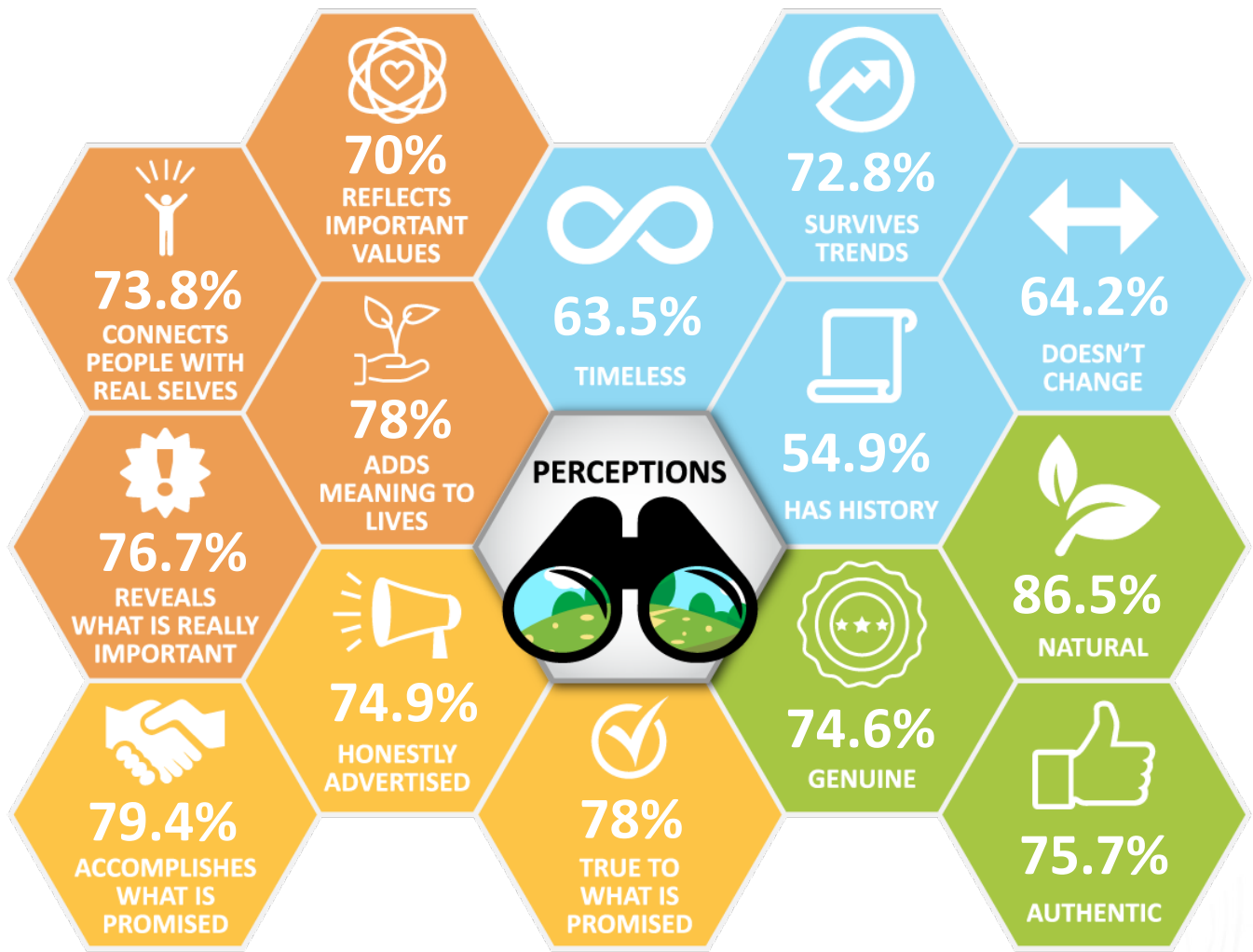
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



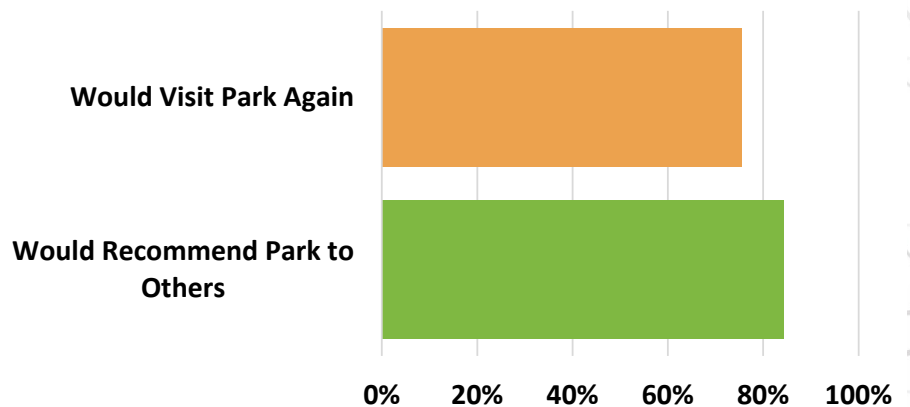
Source: CEDBR



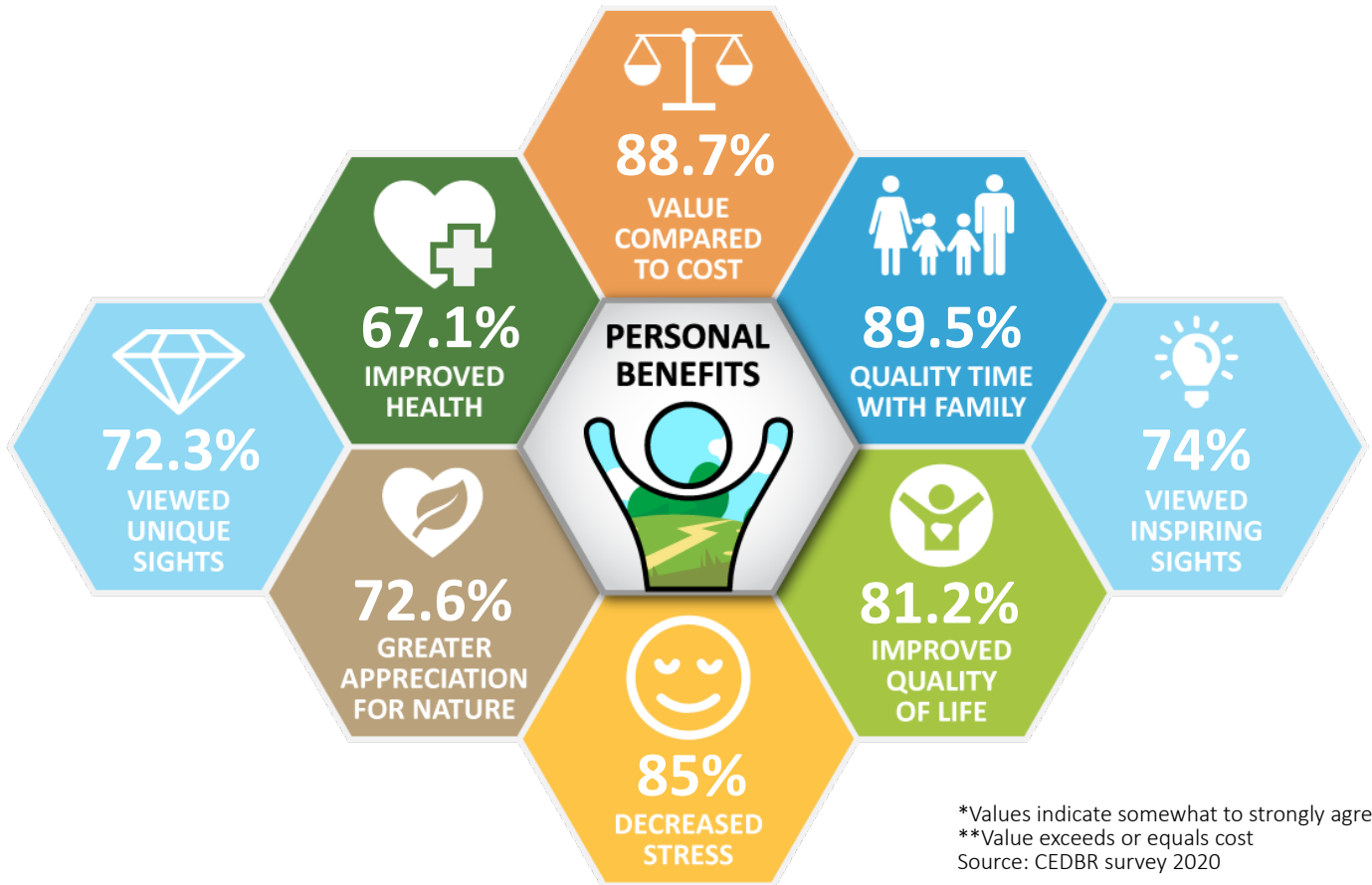
*Values indicate somewhat to strongly agree
 **N= 673
 Source: CEDBR survey 2020

To other visitors, Clinton State Park would be recommended by 84.4 percent of survey respondents, a rate 7.5 percentage points lower than the state park system average, but 75.5 percent of respondents were likely to revisit the park themselves within the year. The park was rated below the state average in every perception category included in the survey, ranging from 4 percentage points below the average for being perceived as natural to 13.6 percentage points below the average for being perceived as a place with history.

Park Visitor Satisfaction



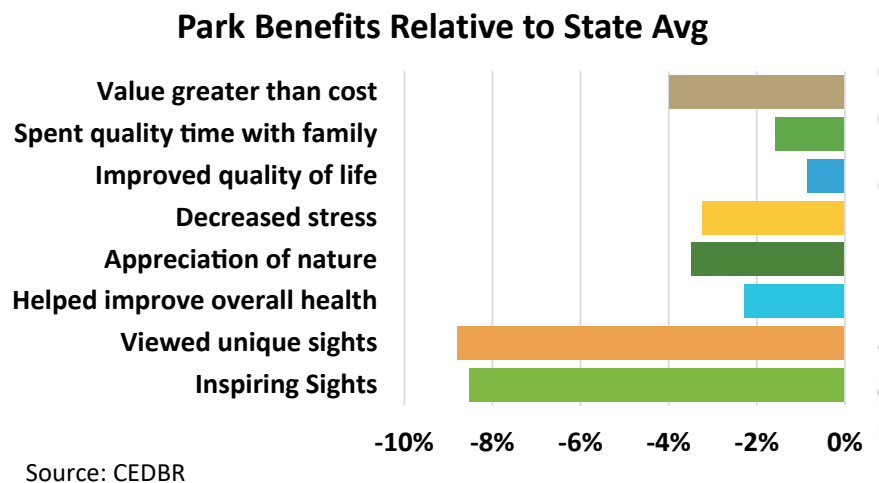
Source: CEDBR

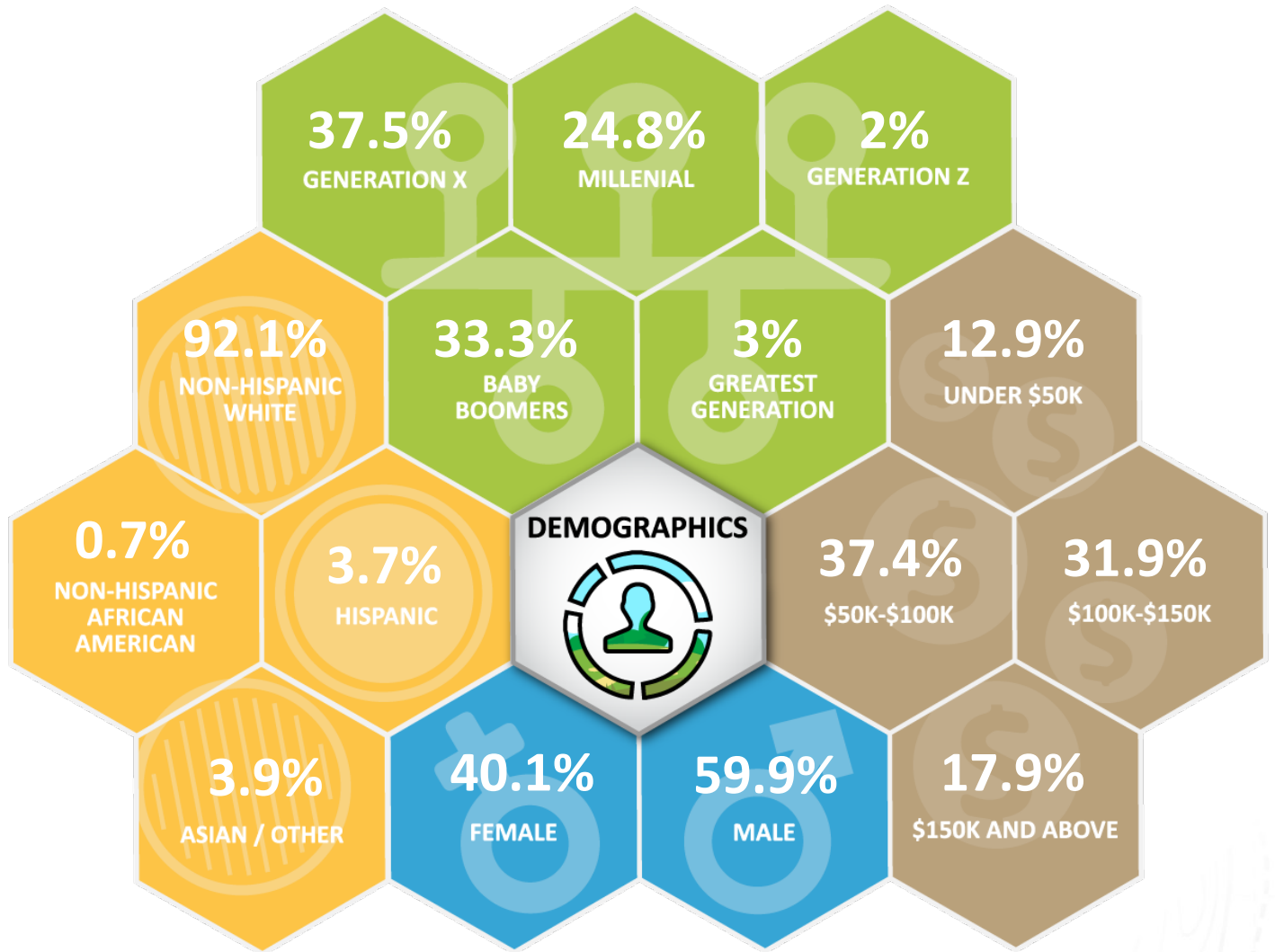


With 88.7 percent of survey respondents believing the value of their visit was higher than the cost, Clinton State Park had the lowest such rate in the state park system, 4 percentage points lower than average. The park's value was lowest with Baby Boomers, who were 7.4 percentage points below average in their value. The park was rated below the state park system average in every personal benefit category, with the sharpest difference in the perception of viewing unique and inspiring sights.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	76%	79%	69%
Viewed unique sights	71%	76%	72%
Helped Improve Overall Health	63%	73%	68%
Appreciation of nature	73%	74%	74%
Decreased stress	85%	90%	83%
Improved Quality time with Family	79%	87%	83%
Spent quality time with family	88%	92%	91%
Value greater than cost	85%	91%	92%

Source: CEDBR

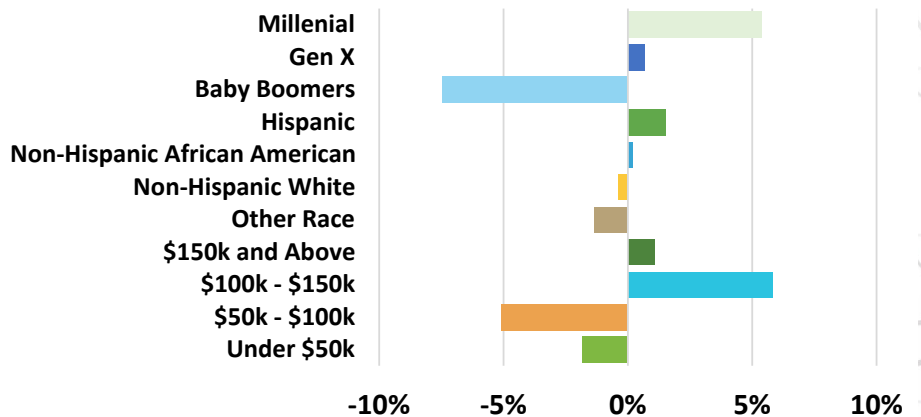




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Among respondents who visited Clinton State Park, 24.8 percent were of the Millennial generation, the highest share of any Kansas state park. The park also had a disproportionately low share of visitors from the Baby Boomer generation, the second-lowest share among state parks. The park's respondents were higher income than average, with a share of \$100,000 to \$150,000 earners 5.8 percentage points greater than average.

Park Visitor Demographics Relative to State Avg



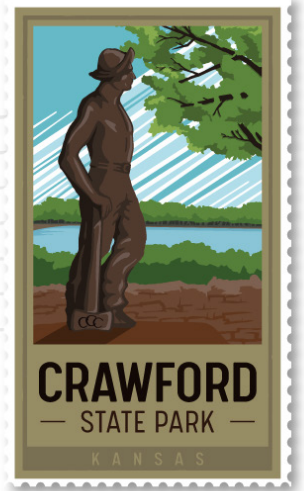
Source: CEDBR

CRAWFORD STATE PARK | CRAWFORD COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$153,235	\$4,717,242	\$870,047	\$5,740,522
EMPLOYMENT	3	181	22	207
OUTPUT	\$94,079	\$8,791,652	\$3,113,773	\$11,999,504

Source: CEDBR

CRAWFORD STATE PARK | CRAWFORD COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$1,756	-	\$11,078
Mining 	\$5,354	0	\$62,228
Construction 	\$14,873	0	\$60,642
Manufacturing 	\$38,972	1	\$295,384
TIPU 	\$310,426	5	\$1,838,066
Trade 	\$3,496,565	145	\$4,172,178
Service 	\$1,811,003	54	\$5,456,800
Government 	\$61,573	1	\$103,129
Total	\$5,740,522	207	\$11,999,504

Source: CEDBR

PARK TAX REVENUE

	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$1,254,935	\$766,211	\$82,794	\$124,352	\$15,182
2020	\$1,234,138	\$753,442	\$81,408	\$122,589	\$15,000

Source: CEDBR

PARK- REGIONAL

	AVERAGE		2020	
	Local	State	Local	State
Labor	\$4,338,032	\$1,402,492	\$4,324,926	\$1,378,098
Employment	163	44	161	43
Output	\$8,834,188	\$3,165,316	\$8,800,618	\$3,112,439

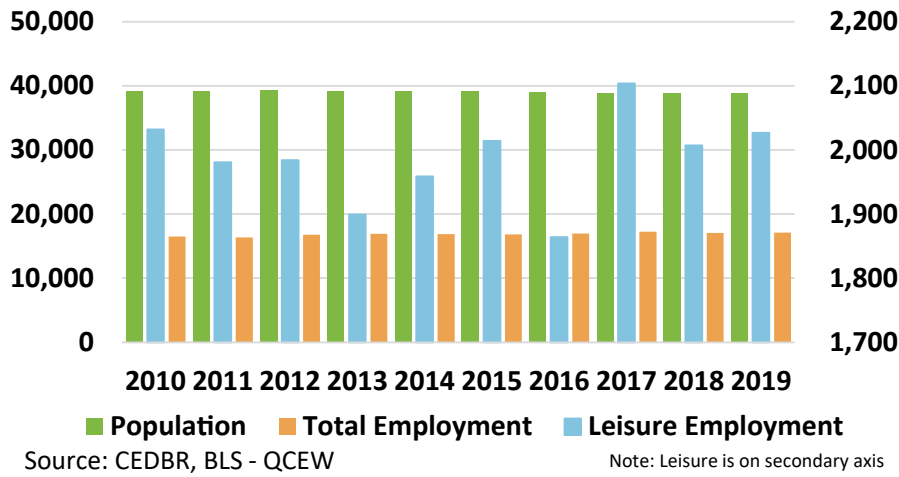
Source: CEDBR

Market Data

CRAWFORD COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	39,019	38,818	-0.5%	-0.2%	11
Total Employment	17,051	17,113	0.4%	0.3%	8
Leisure & Hospitality Employment	2,007	2,027	1.0%	0.7%	10
Leisure & Hospitality Share	11.8%	11.8%	0.1%	0.4%	12
Average Annual Wage (All Industries)	\$35,175	\$35,989	2.3%	2.6%	11
Average Annual Wage (Leisure & Hosp)	\$14,659	\$15,158	3.4%	7.5%	1
L&H Employment Location Quotient	1.26	1.27	0.8%	-0.2%	9

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Crawford Employment



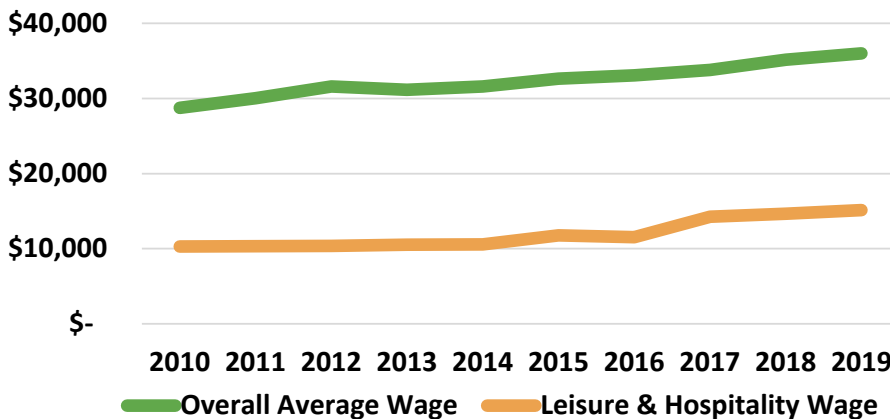
Total Population



Leisure Employment



Crawford Average Wages



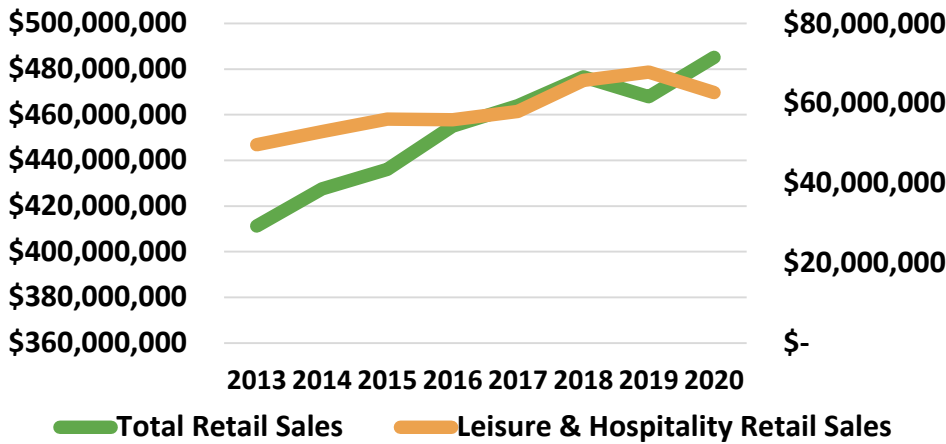
Average Leisure Wages



CRAWFORD COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$467,968,584	\$485,172,134	3.7%	2.2%	8
Leisure & Hospitality Retail Sales	\$67,791,531	\$62,702,511	-7.5%	2.3%	9
Per Capita Retail Sales	\$11,993.35	\$12,498.64	4.2%	2.4%	6
Per Capita L&H Retail Sales	\$1,737.40	\$1,615.29	-7.0%	2.5%	10
County Pull Factor (All Sales)	0.83	0.80	-3.5%	1.0%	2
County Pull Factor (L&H Sales)	0.89	0.97	8.8%	3.0%	10

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Crawford Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)



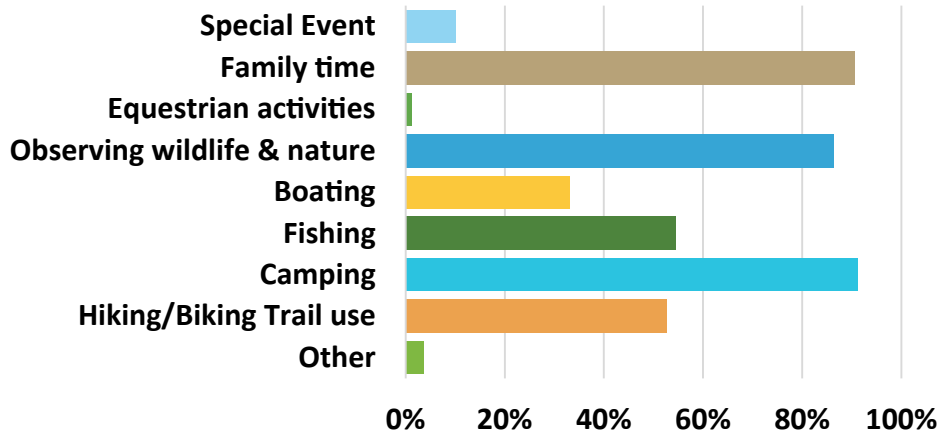
County Pull Factor (L&H)



Crawford Park’s market area had the third-highest concentration of leisure and hospitality workers in 2019 among Kansas’ state parks. Those hospitality workers experienced the fastest wage growth in the last five years of any park market area, growing an average of 7.5 percent annually. Despite the fast growth, the area’s average hospitality wage of \$15,158 remained more than \$2,000 below the state average in 2019. Average per person hospitality retail spending of \$1,615 in the area was only slightly below the state average of \$1,671 and ranked sixth among state park market areas.

Visitor Survey

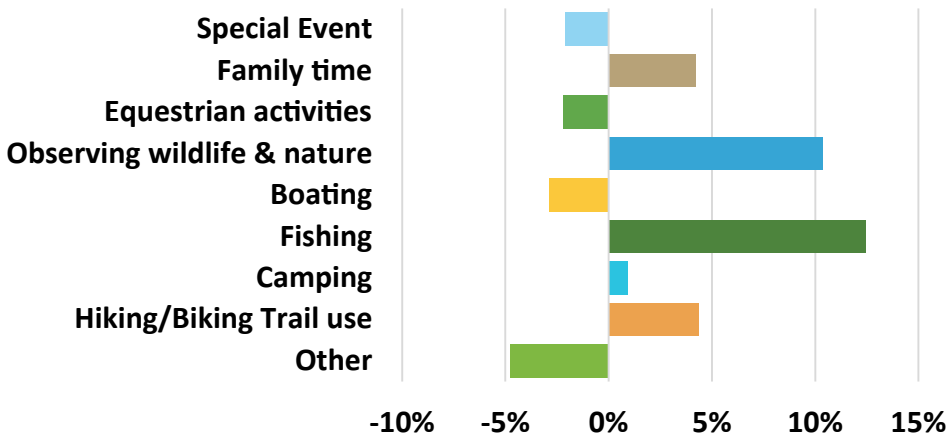
Park Visitor Activities



Source: CEDBR

At Crawford State Park, the activities of camping, family time, and observing nature were each engaged in by more than 85 percent of respondents. Fishing was another popular activity at the park, 12.5 percent more popular at Crawford State Park than the state park average.

Park Visitor Activities Relative to State Avg



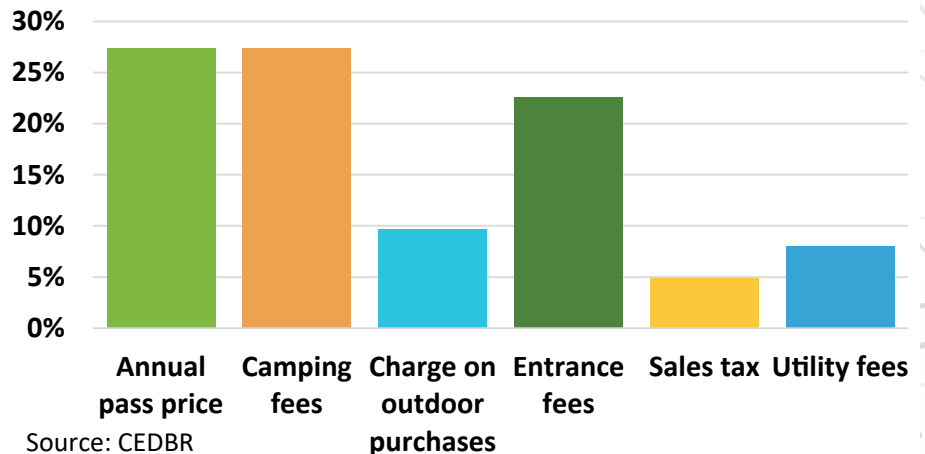
Source: CEDBR

A clear majority, 57.4 percent of respondents, supported increased fees to improve park services, though this was 7 percent lower than the average across all parks.

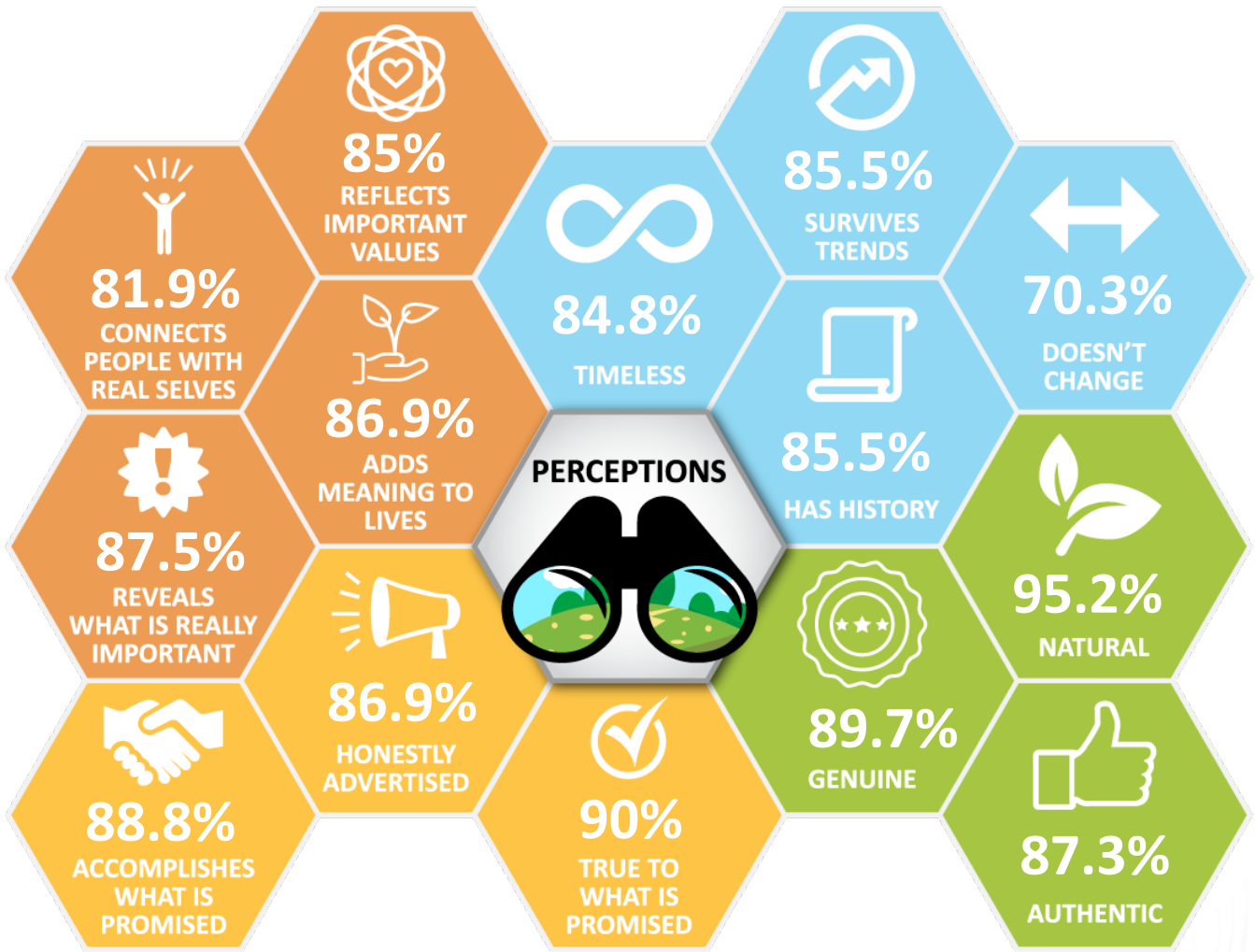
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



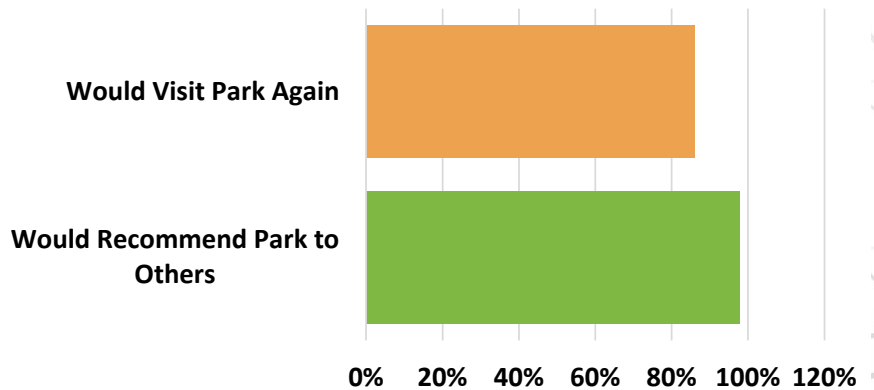
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 238
 Source: CEDBR survey 2020

Survey respondents who visited Crawford State Park were the second most likely to recommend the park to other visitors, at 97.9 percent. The park was highly rated by respondents across all of the perception categories. Crawford was the only Kansas state park with greater than 80 percent of respondents agreeing with thirteen of the fourteen perception categories. The perception with the lowest agreement was that the park was a place that does not change, which still received agreement 70.3 percent of survey respondents.

Park Visitor Satisfaction



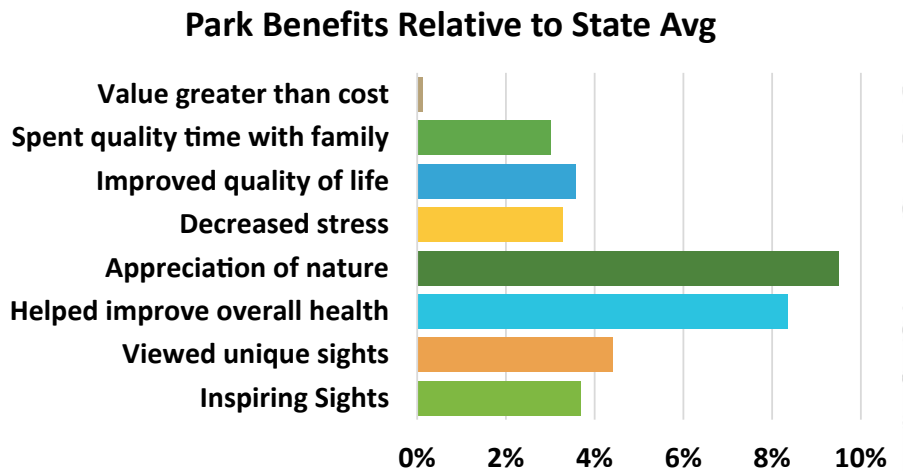
Source: CEDBR

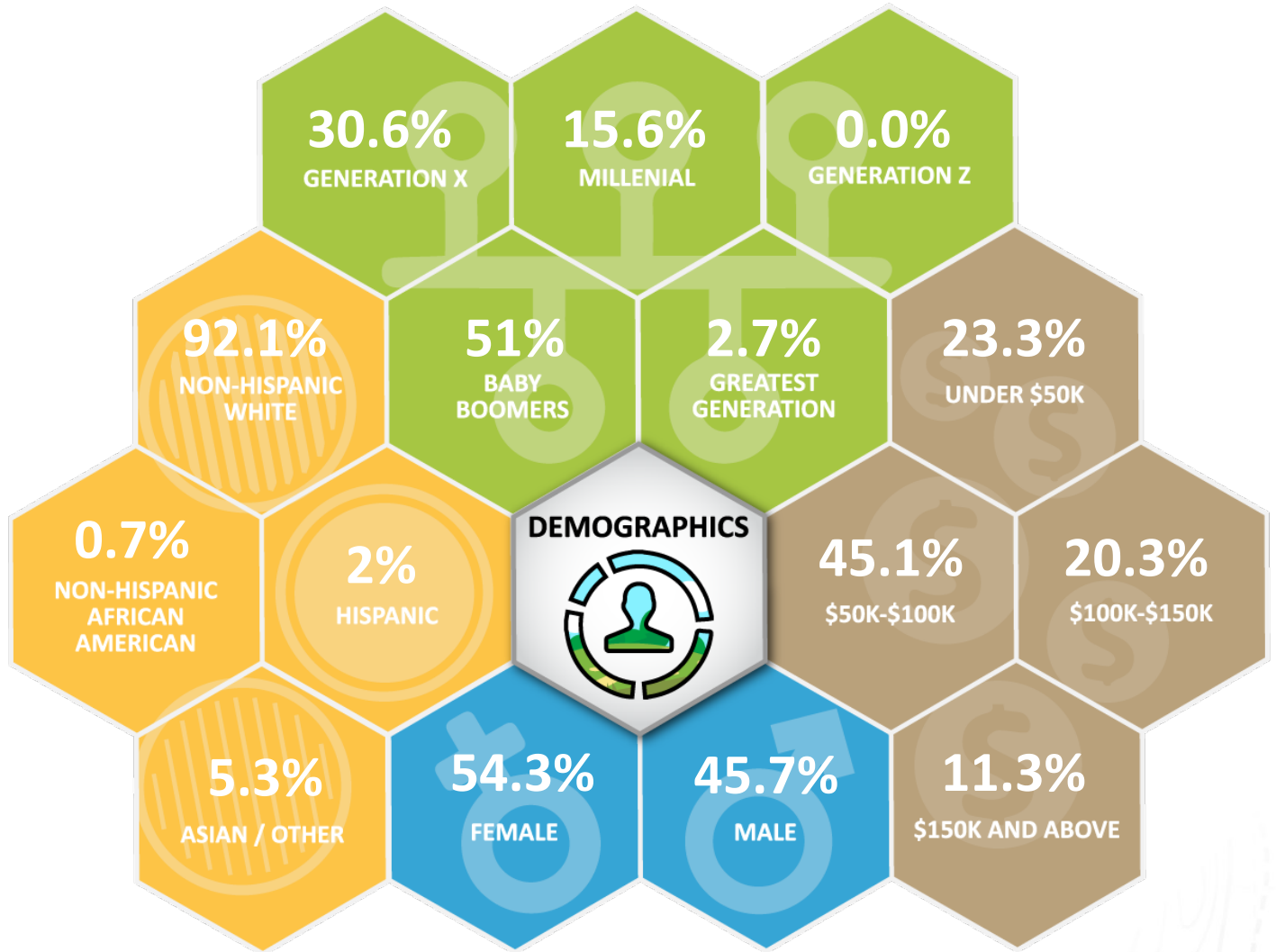


The two most common personal benefits reported by survey respondents who visited Crawford State Park were spending quality time with family members and decreased stress levels, each of which was reported by more than nine in ten respondents. The park had the highest rate of any Kansas state park of appreciation of nature by respondents, at a rate 9.5 percentage points higher than the state park average. Respondents ranked the park as second highest in improving personal health, a rate 8.4 percentage points higher than average.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	88%	82%	87%
Viewed unique sights	85%	87%	87%
Helped Improve Overall Health	76%	78%	78%
Appreciation of nature	87%	82%	87%
Decreased stress	95%	87%	91%
Improved Quality time with Family	87%	82%	87%
Spent quality time with family	91%	96%	100%
Value greater than cost	89%	100%	91%

Source: CEDBR

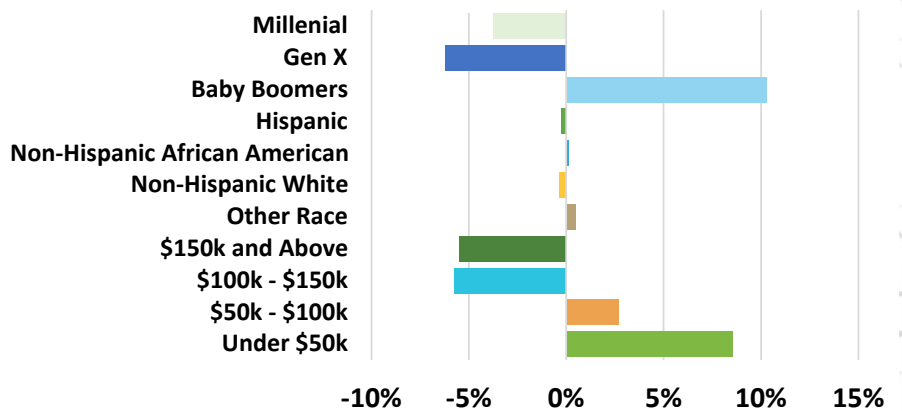




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Crawford State Park had the third-highest share of survey respondents who reported an income of less than \$100,000 of any Kansas state park. The park also ranked in the top five Kansas state parks in terms of the share of respondents who were part of the Baby Boomer generation and in the bottom five for respondents in the Millennial generation. On average, the park's respondents were 2.1 years older than respondents from all Kansas state parks.

Park Visitor Demographics Relative to State Average



Source: CEDBR

CROSS TIMBERS STATE PARK | WOODSON COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$222,549	\$5,415,824	\$764,297	\$6,402,672
EMPLOYMENT	5	237	20	263
OUTPUT	\$75,675	\$10,698,636	\$2,849,256	\$13,623,561

Source: CEDBR

CROSS TIMBERS STATE PARK | WOODSON COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$2,442	-	\$18,289
Mining		\$8,369	0	\$113,631
Construction		\$22,097	0	\$82,849
Manufacturing		\$44,711	1	\$373,678
TIPU		\$320,504	8	\$2,090,455
Trade		\$3,882,145	186	\$4,845,559
Service		\$2,037,630	66	\$5,926,915
Government		\$84,774	1	\$172,184
Total		\$6,402,672	263	\$13,623,561

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$1,175,274	\$1,370,670	\$123,951	\$144,952	\$15,506
2020	\$433,904	\$506,437	\$45,769	\$54,136	\$5,958

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$4,273,574	\$2,129,097	\$1,968,208	\$787,327
Employment	203	60	82	22
Output	\$8,535,672	\$5,087,891	\$3,415,258	\$1,889,714

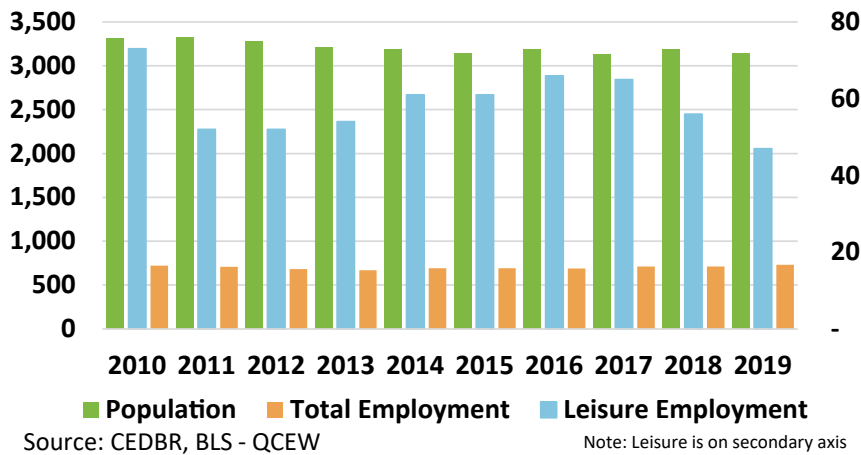
Source: CEDBR

Market Data

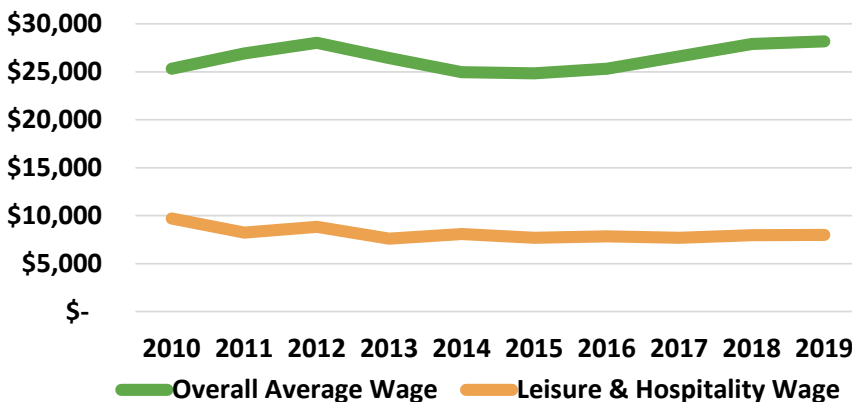
WOODSON COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	3,183	3,138	-1.4%	-0.1%	9
Total Employment	710	730	2.8%	1.1%	3
Leisure & Hospitality Employment	56	47	-16.1%	-5.1%	23
Leisure & Hospitality Share	7.9%	6.4%	-1.4%	-6.1%	26
Average Annual Wage (All Industries)	\$27,919	\$28,189	1.0%	2.5%	14
Average Annual Wage (Leisure & Hosp)	\$7,966	\$7,981	0.2%	-0.2%	25
L&H Employment Location Quotient	0.84	0.69	-18.2%	-6.7%	21

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Woodson Employment



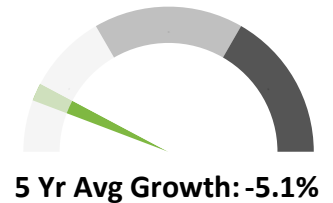
Woodson Average Wages



Total Population



Leisure Employment



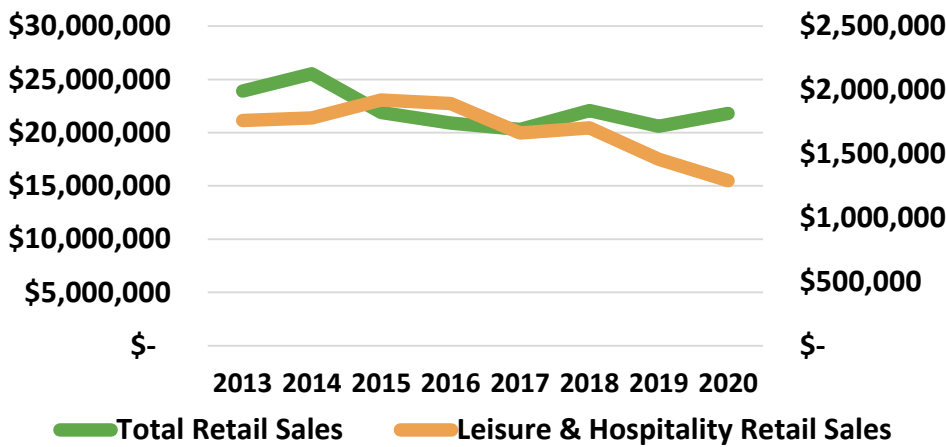
Average Leisure Wages



WOODSON COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$20,609,098	\$21,797,338	5.8%	-0.1%	19
Leisure & Hospitality Retail Sales	\$1,457,725	\$1,290,570	-11.5%	-7.6%	26
Per Capita Retail Sales	\$6,474.74	\$6,946.25	7.3%	0.0%	21
Per Capita L&H Retail Sales	\$457.97	\$411.27	-10.2%	-7.5%	26
County Pull Factor (All Sales)	0.47	0.44	-7.4%	-5.1%	24
County Pull Factor (L&H Sales)	0.23	0.25	5.1%	-7.1%	26

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Woodson Retail Sales

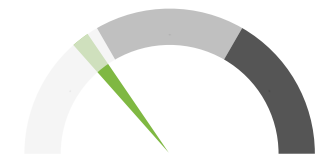


Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Despite a population decline of 0.6 percent from 2014 to 2019, the Cross Timbers Park market area’s employment grew at the third-fastest rate of any Kansas state park market area, expanding by 5.6 percent. Average annual wages grew faster than the state average, increasing more than \$3,000 in the past five years. Average annual leisure and hospitality wages were the lowest among park market areas and less than half the state average. The Cross Timbers area was the only one to have hospitality wages decline in the last five years. The area had a relatively low level of retail sales, with a leisure and hospitality pull factor of 0.25, showing that hospitality sales per person were three quarters lower than the state average level.

Total Taxable Retail Sales



5 Yr Avg Growth: -0.1%

Leisure Retail Sales



5 Yr Avg Growth: -7.6%

County Pull Factor (All)



5 Yr Avg Growth: -5.1%

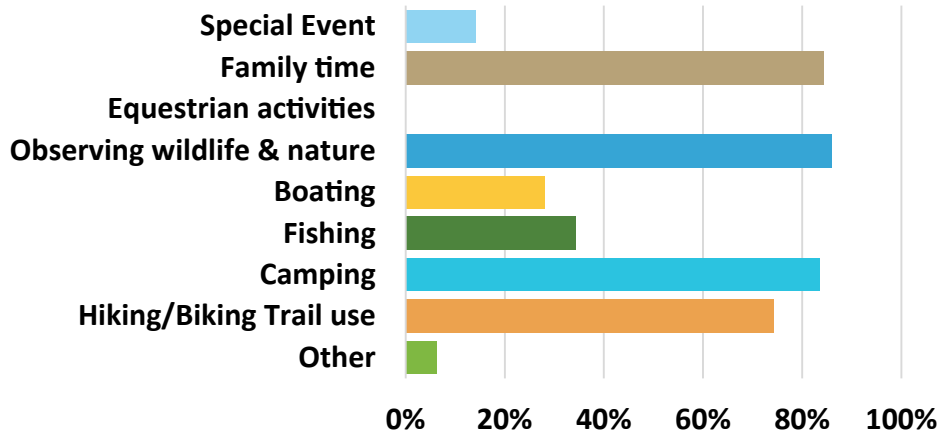
County Pull Factor (L&H)



5 Yr Avg Growth: -7.1%

Visitor Survey

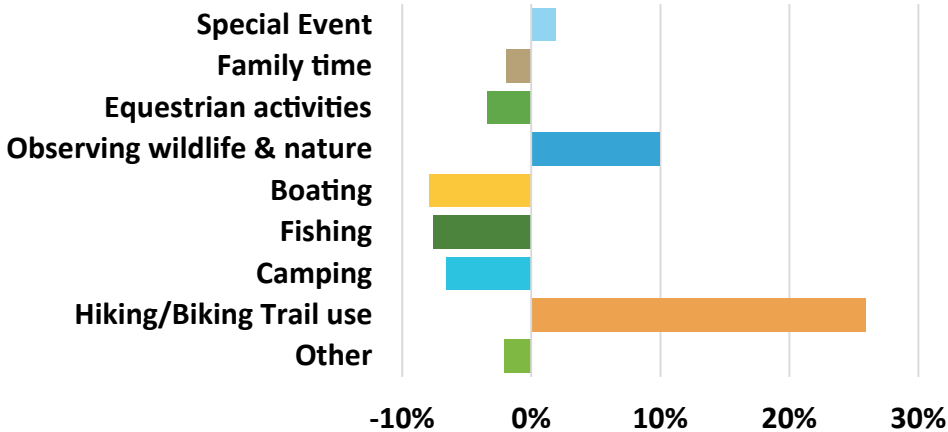
Park Visitor Activities



Cross Timbers State Park was the second most popular park in the state for hiking and cycling. Almost 75 percent of respondents reported engaging in those activities on their most recent visit, 25.2 percentage points higher than the state average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



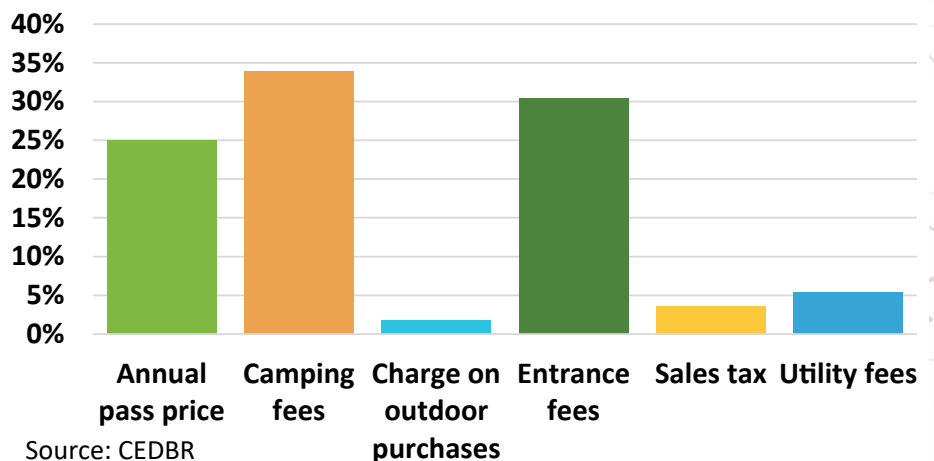
Observing nature was the other activity where Cross Timbers significantly outpaced the overall park system, as it was engaged in by 9.9 percentage points more respondents than the state average.

Source: CEDBR

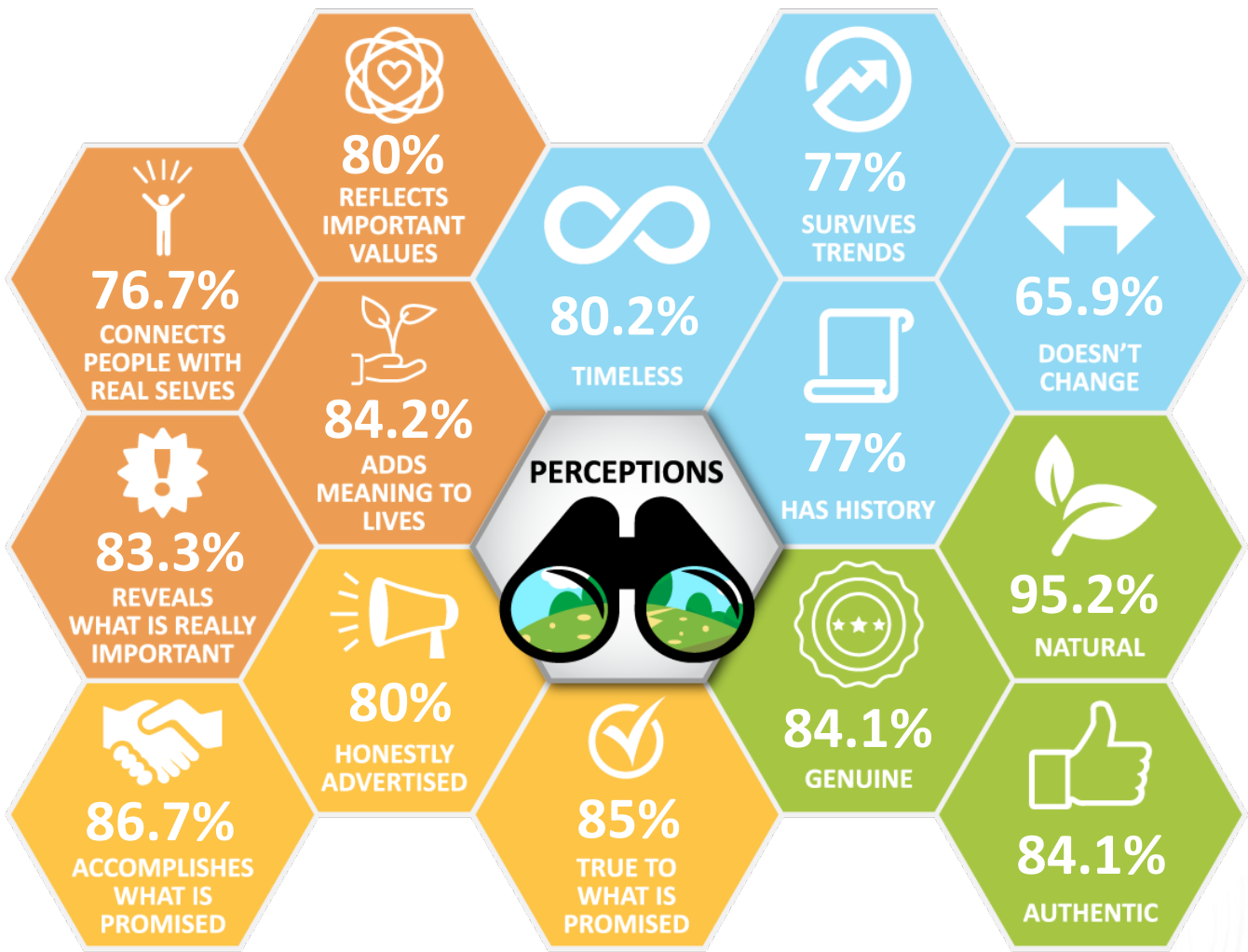
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



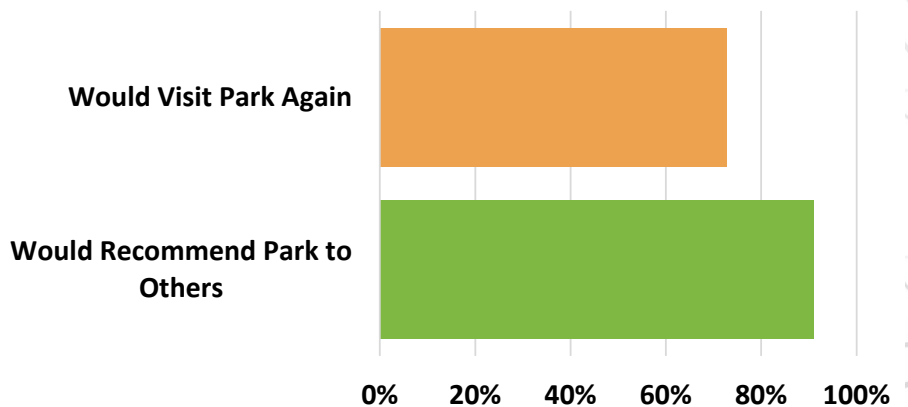
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 154
 Source: CEDBR survey 2020

More than nine in ten survey respondents who visited Cross Timbers State Park would recommend the park to other visitors. Only 72.7 percent of those respondents were likely to revisit the park within 12 months, which was 7.2 percentage points lower than the state park system average. The park received above state park average rankings in ten of the fourteen perception categories. The park was ranked highly as a place with a history, with 8.5 percentage points above average.

Park Visitor Satisfaction



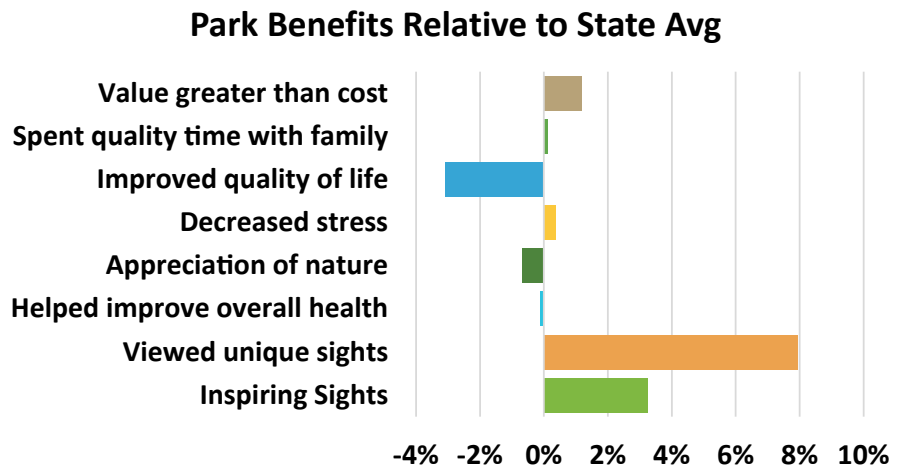
Source: CEDBR

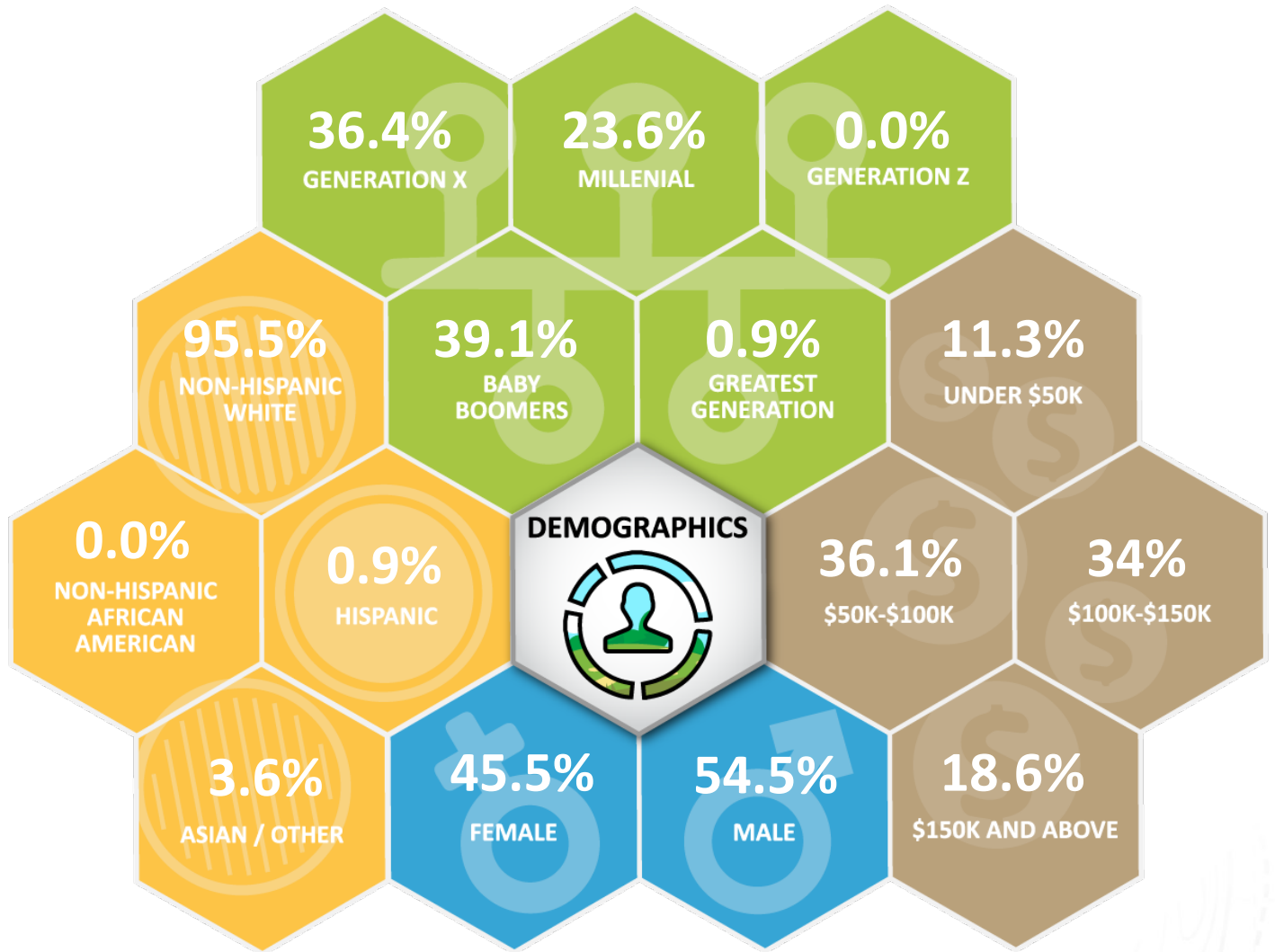


Cross Timbers State Park was valued more highly than its costs by 93.9 percent of survey respondents who visited the park, 1.2 percentage points higher than the state park system average. The park received high marks among respondents for its value in spending quality time with family, appreciating nature, and viewing unique sights, for which the park ranked third highest in the state. Respondents from Generation X generally had the most favorable view of the park and its benefits.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	84%	90%	81%
Viewed unique sights	91%	85%	88%
Helped Improve Overall Health	67%	75%	65%
Appreciation of nature	70%	80%	77%
Decreased stress	88%	90%	88%
Improved Quality time with Family	79%	78%	81%
Spent quality time with family	98%	88%	85%
Value greater than cost	91%	100%	88%

Source: CEDBR

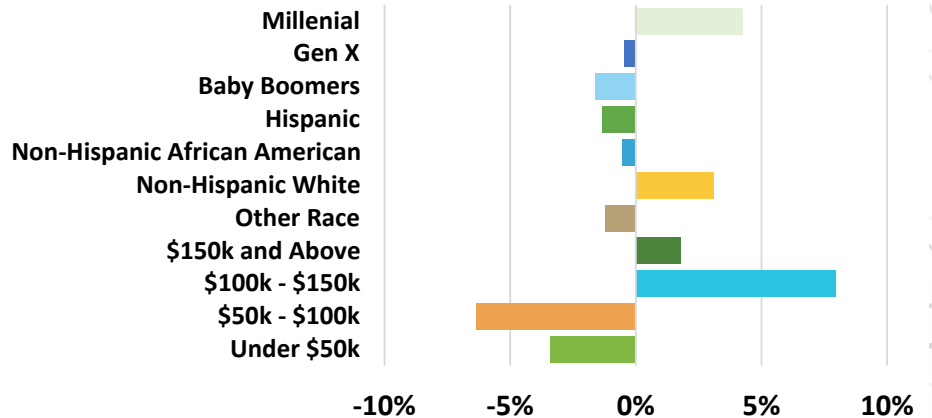




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Cross Timbers State Park tended to have some of the highest incomes of any Kansas state park. The share of respondents with an income of \$150,000 or greater was 18.6 percent, one of the highest in the state, and the share earning \$100,000 to \$150,000 was the highest of any Kansas park. Park visitors tended to be slightly younger than the average park, with an average age 1.4 years younger than the state park average of 52 years old.

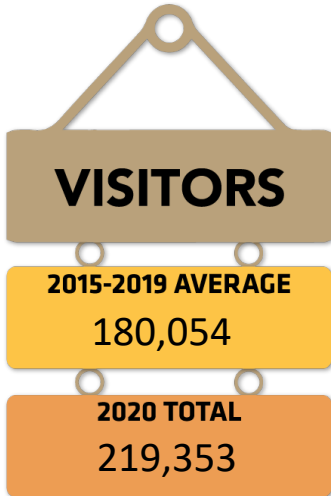
Park Visitor Demographics Relative to State Avg



Source: CEDBR

EISENHOWER STATE PARK | OSAGE COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$192,674	\$2,728,521	\$361,137	\$3,282,325
EMPLOYMENT	4	132	9	145
OUTPUT	\$147,355	\$5,924,441	\$1,393,514	\$7,465,306

Source: CEDBR

EISENHOWER STATE PARK | OSAGE COUNTY (CONTINUED)

PARK INDUSTRY CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$1,550	-	\$8,718
Mining 	\$3,574	0	\$57,585
Construction 	\$14,781	0	\$53,284
Manufacturing 	\$14,567	0	\$185,844
TIPU 	\$186,192	4	\$1,116,800
Trade 	\$1,771,874	102	\$2,504,628
Service 	\$1,233,194	38	\$3,399,373
Government 	\$56,593	1	\$139,074
Total	\$3,282,325	145	\$7,465,306

Source: CEDBR

PARK TAX REVENUE

	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$661,961	\$736,905	\$74,285	\$67,137	\$7,211
2020	\$805,779	\$896,975	\$90,423	\$81,605	\$8,753

Source: CEDBR

PARK- REGIONAL

	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,084,364	\$1,197,961	\$2,500,768	\$1,457,329
Employment	113	33	135	40
Output	\$4,524,072	\$2,941,234	\$5,444,795	\$3,576,815

Source: CEDBR

Market Data

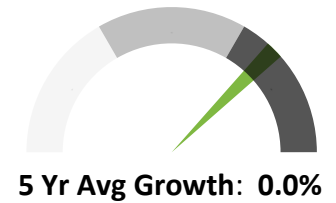
OSAGE COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	15,941	15,949	0.1%	0.0%	7
Total Employment	2,807	2,799	-0.3%	-0.5%	16
Leisure & Hospitality Employment	166	173	4.2%	-1.2%	16
Leisure & Hospitality Share	5.9%	6.2%	0.3%	-0.7%	19
Average Annual Wage (All Industries)	\$28,289	\$29,718	5.1%	2.8%	5
Average Annual Wage (Leisure & Hosp)	\$11,632	\$11,490	-1.2%	3.5%	7
L&H Employment Location Quotient	0.63	0.66	4.7%	-1.3%	16

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

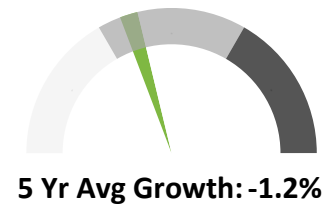
Osage Employment



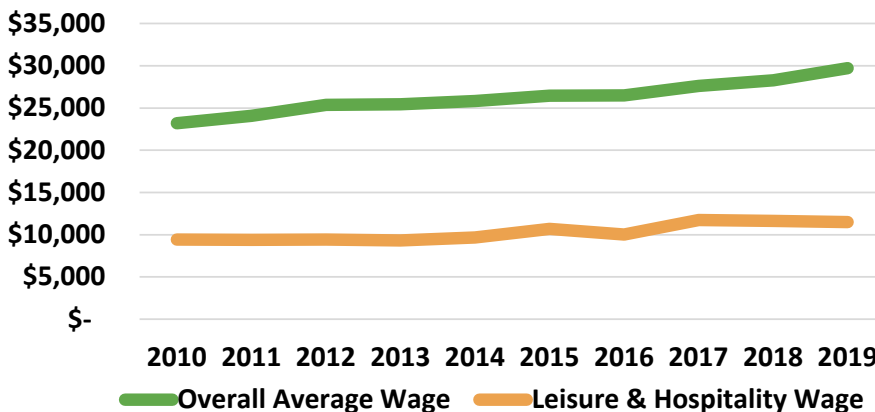
Total Population



Leisure Employment



Osage Average Wages



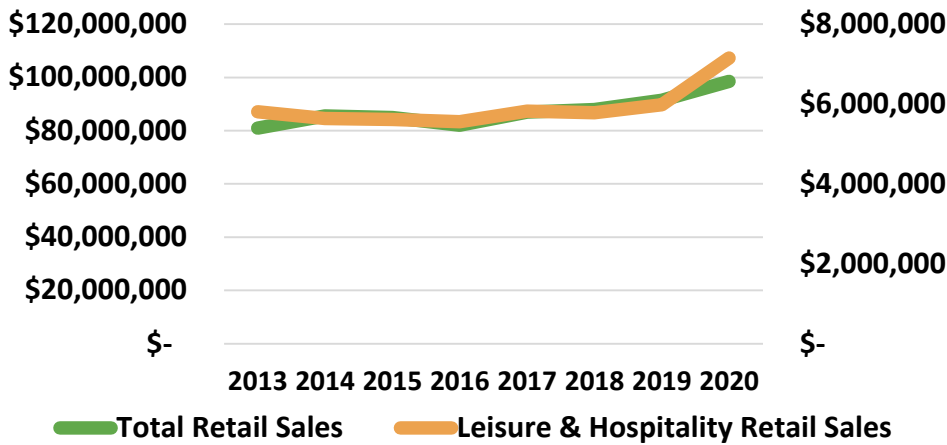
Average Leisure Wages



OSAGE COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$91,375,747	\$98,550,706	7.9%	3.0%	5
Leisure & Hospitality Retail Sales	\$5,980,520	\$7,154,442	19.6%	5.0%	4
Per Capita Retail Sales	\$5,732.12	\$6,179.12	7.8%	3.0%	5
Per Capita L&H Retail Sales	\$375.17	\$448.58	19.6%	4.9%	4
County Pull Factor (All Sales)	0.38	0.38	1.5%	0.2%	7
County Pull Factor (L&H Sales)	0.19	0.27	40.0%	5.5%	4

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Osage Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: 3.0%

Leisure Retail Sales



5 Yr Avg Growth: 5.0%

County Pull Factor (All)



5 Yr Avg Growth: 0.2%

County Pull Factor (L&H)

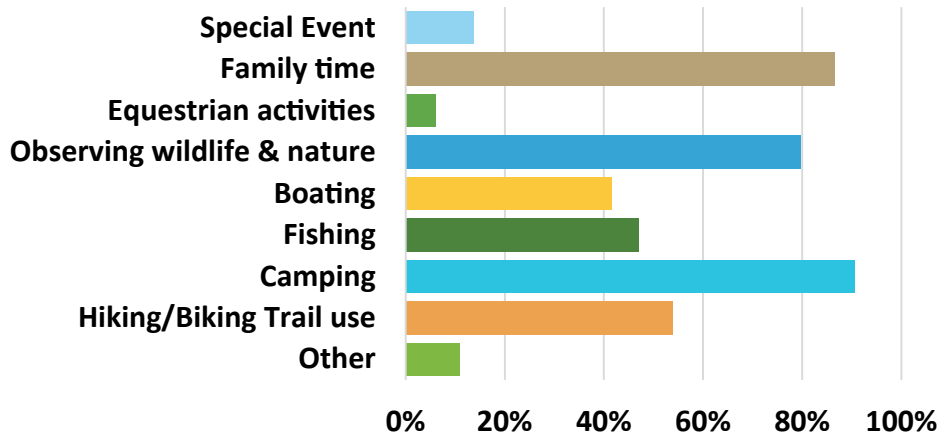


5 Yr Avg Growth: 5.5%

Eisenhower Park’s market area was one of only seven Kansas state park market areas to increase in population from 2014 to 2019, though total employment did decline by 2.5 percent, a decrease of almost 100 workers. Average annual wages in the area grew more than 2 percent faster than the state average in the past five years, as did average annual leisure and hospitality wages. While the area had the lowest level of retail spending per capita among park market areas, spending growth was more than triple the state average in the past five years, with hospitality spending per capita growing 5 percent faster than the state average annually.

Visitor Survey

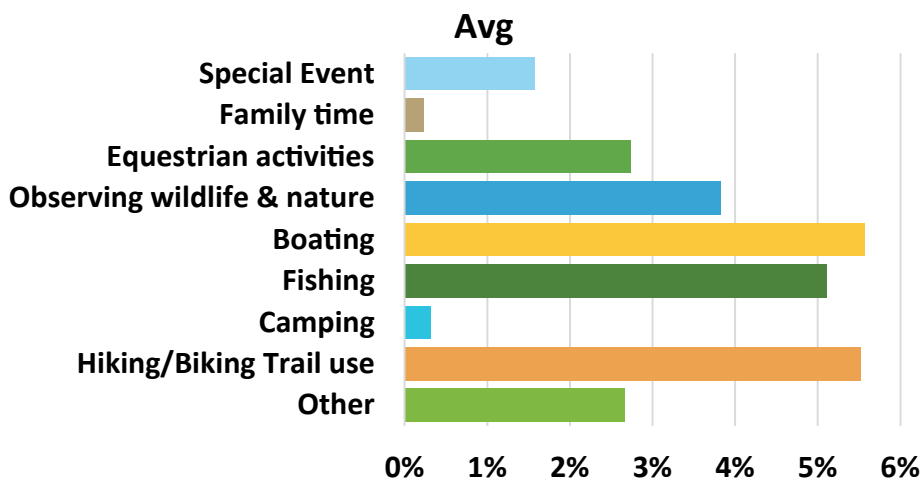
Park Visitor Activities



Hiking and cycling, fishing, and boating were each engaged in at a rate 5 percentage points higher than the state average at Eisenhower State Park. On average, survey respondents who visited Eisenhower State Park participated in more activities during their visit than respondents from other state parks.

Source: CEDBR

Park Visitor Activities Relative to State



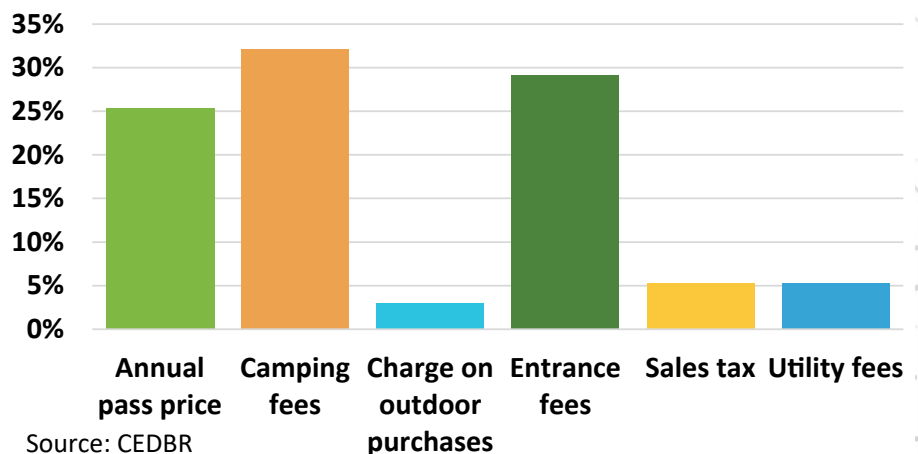
Every activity at Eisenhower was reported at a rate higher than the state average. The most popular activity at the park was camping, with 90.5 percent of respondents.

Source: CEDBR

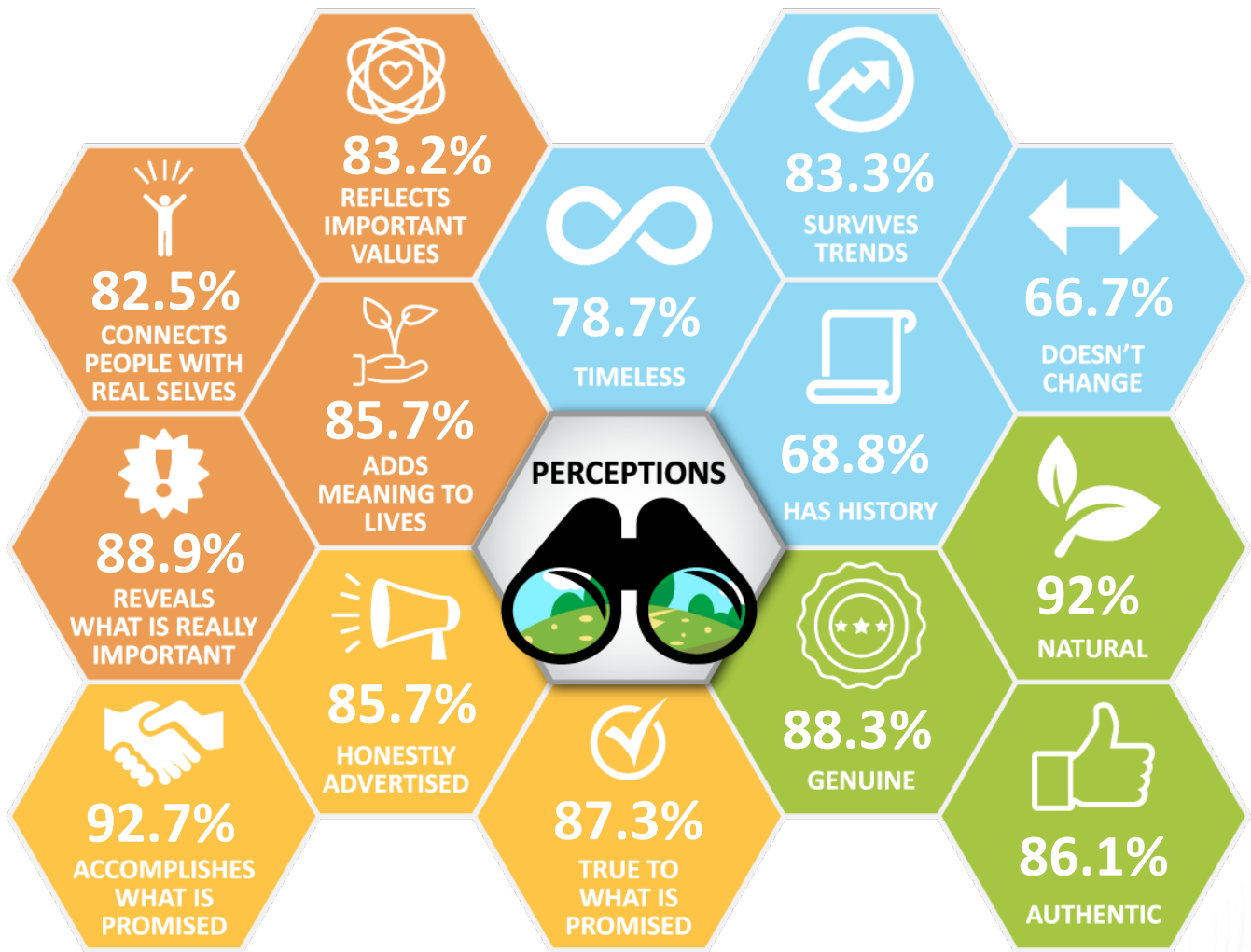
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



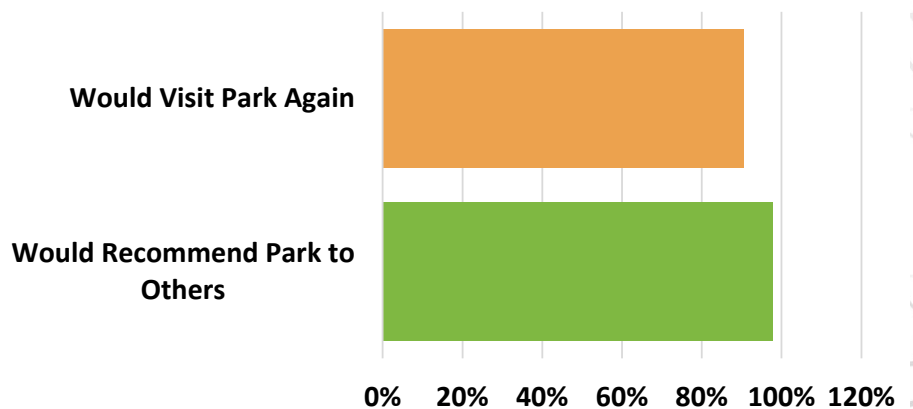
Source: CEDBR



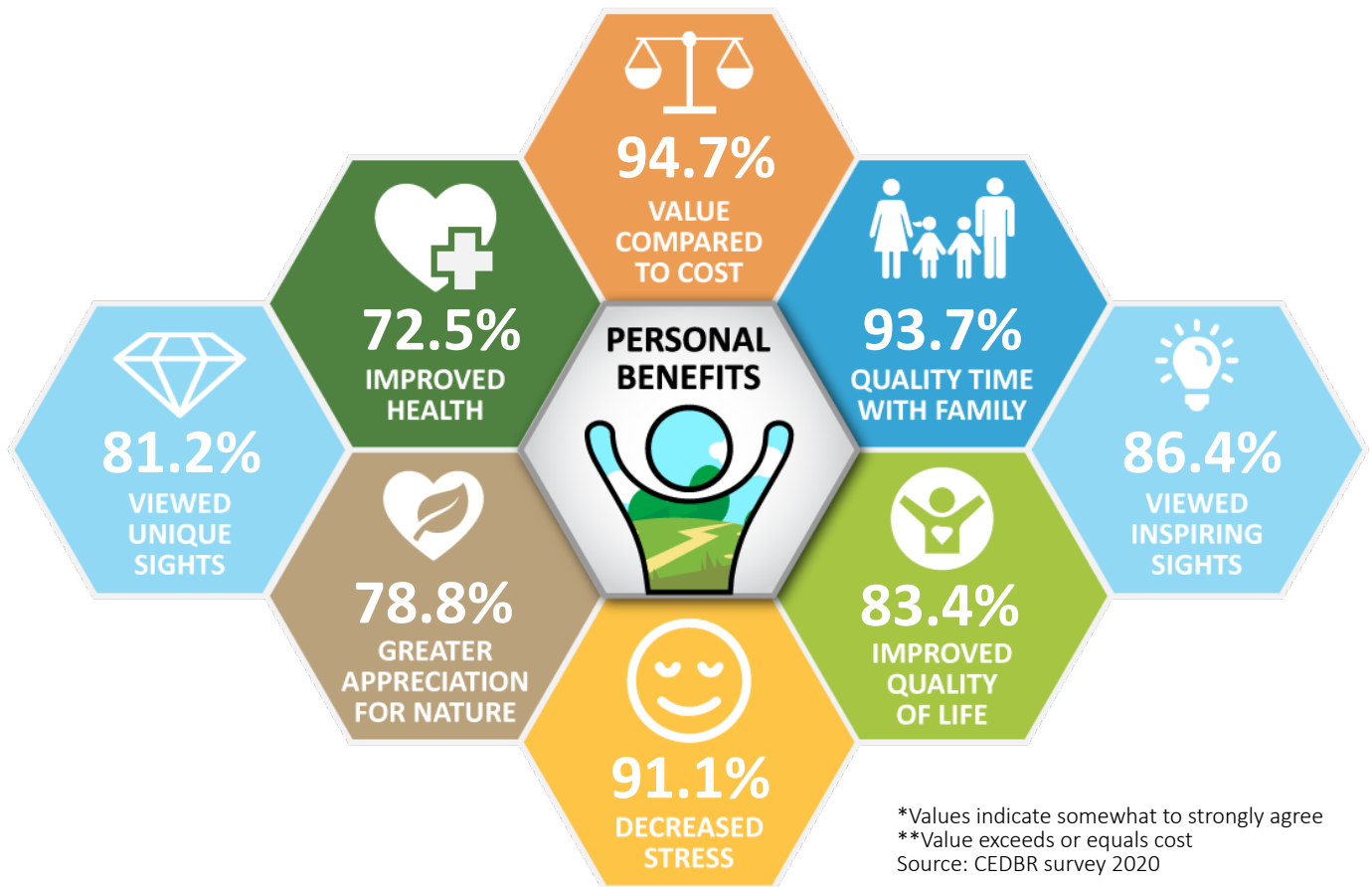
*Values indicate somewhat to strongly agree
 **N= 424
 Source: CEDBR survey 2020

Visitors to Eisenhower State Park were highly satisfied with their visits, with less than 3 percent of survey respondents who would not recommend the park to other visitors. The park ranked the second highest in terms of visitors willing to repeat the trip, as 90.5 percent of respondents were likely to revisit the park within 12 months. Respondents rated the park 6.9 percentage points higher than the state average in perceptions that the park accomplished what it promised to visitors.

Park Visitor Satisfaction



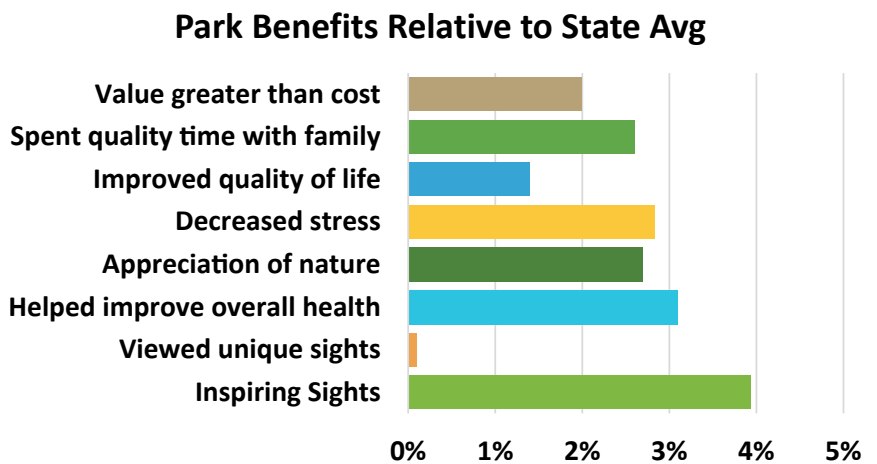
Source: CEDBR

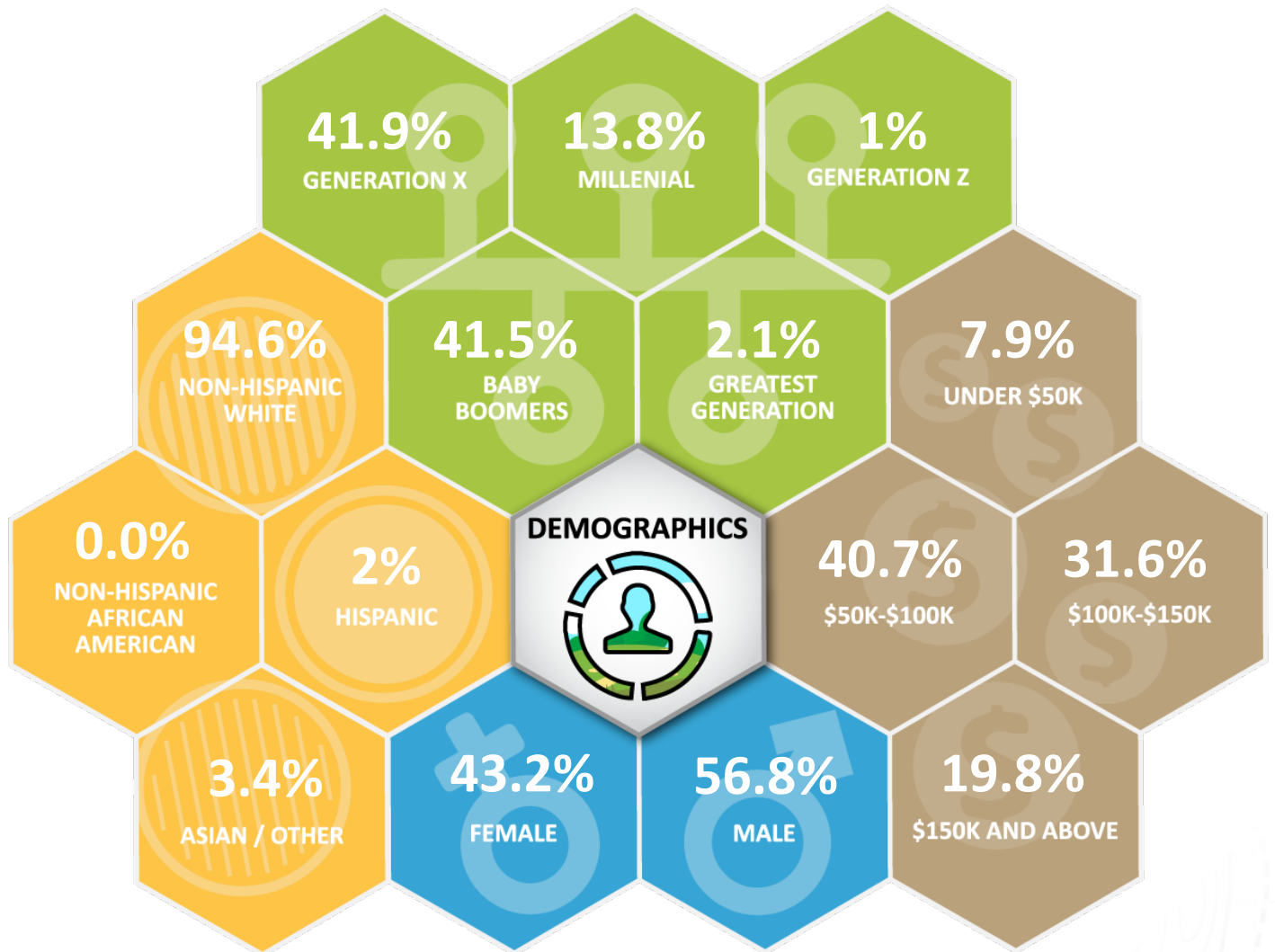


Almost 95 percent of survey respondents who visited Eisenhower State Park received value greater than their cost of attending the park, the third-highest of any Kansas State Park. Respondents reported benefiting from spending quality time with family at the park, decreased stress, improved health, and appreciating nature at rates two to three percentage points higher than the average state park. Both Millennials and Generation X respondents had the highest level of satisfaction with the park, with more than 96 percent of each group getting greater value than their trip’s cost.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	88%	89%	80%
Viewed unique sights	85%	82%	88%
Helped Improve Overall Health	72%	72%	78%
Appreciation of nature	82%	77%	80%
Decreased stress	88%	94%	93%
Improved Quality time with Family	84%	87%	80%
Spent quality time with family	95%	95%	88%
Value greater than cost	92%	97%	100%

Source: CEDBR

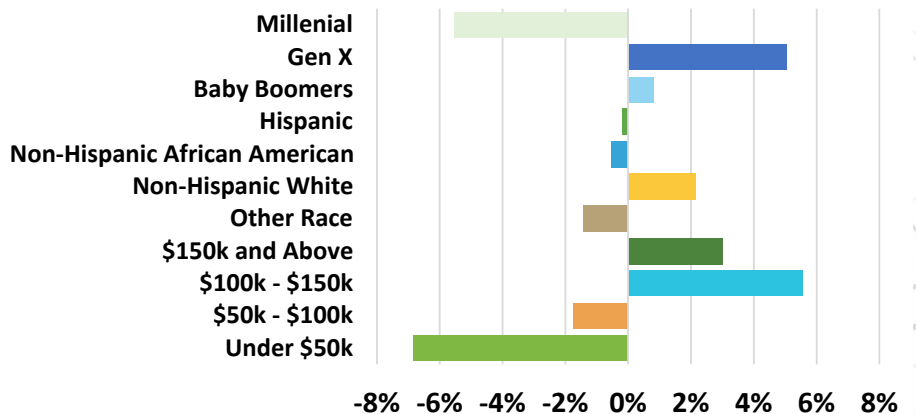




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Only 48.6 percent of survey respondents who visited Eisenhower State Park reported an income lower than \$100,000, 8.6 percentage points below the average state park, indicating the relatively high incomes of visitors to Eisenhower. The park had the third-highest share of members of Generation X of any Kansas state park, at 41.9 percent, and the fourth-lowest share of Millennials, at 13.8 percent. Among the respondents, Eisenhower's share of people of color was 2.1 percentage points less than the average state park.

Park Visitor Demographics Relative to State Avg



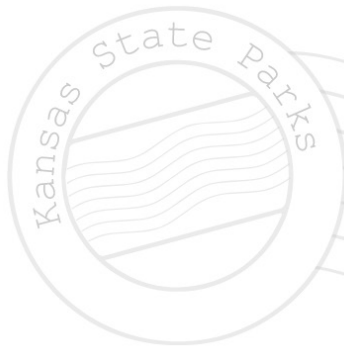
Source: CEDBR

EL DORADO STATE PARK | BUTLER COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT 	INDIRECT 	INDUCED 	TOTAL
LABOR	\$387,526	\$14,241,998	\$2,361,910	\$16,991,425
EMPLOYMENT	10	592	58	659
OUTPUT	\$420,134	\$29,901,724	\$8,725,814	\$39,047,670

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$7,809	0	\$41,538
Mining		\$30,627	1	\$382,501
Construction		\$79,192	1	\$269,008
Manufacturing		\$80,753	1	\$1,061,308
TIPU		\$920,769	24	\$6,887,762
Trade		\$10,113,964	457	\$12,436,689
Service		\$5,545,890	171	\$17,584,812
Government		\$212,422	3	\$384,052
Total		\$16,991,425	659	\$39,047,670

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$2,767,712	\$3,476,237	\$482,380	\$395,804	\$45,563
2020	\$4,230,087	\$5,311,802	\$737,060	\$600,776	\$68,950

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$11,815,554	\$5,175,870	\$17,537,237	\$7,898,501
Employment	510	150	764	229
Output	\$27,106,362	\$11,941,312	\$40,301,898	\$18,185,021

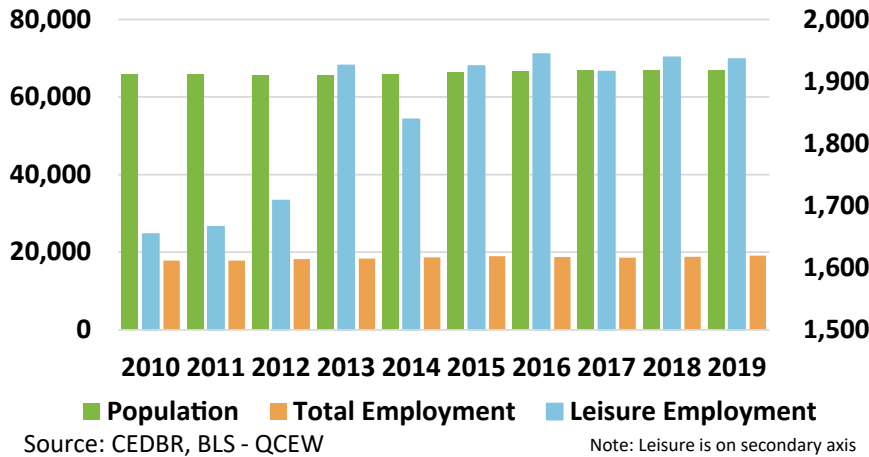
Source: CEDBR

Market Data

BUTLER COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	65,058	65,415	0.5%	0.2%	4
Total Employment	18,780	19,142	1.9%	0.5%	7
Leisure & Hospitality Employment	1,939	1,936	-0.2%	1.0%	7
Leisure & Hospitality Share	10.3%	10.1%	-0.2%	0.5%	10
Average Annual Wage (All Industries)	\$38,477	\$39,968	3.9%	3.1%	3
Average Annual Wage (Leisure & Hosp)	\$15,842	\$16,068	1.4%	2.7%	12
L&H Employment Location Quotient	1.10	1.08	-1.9%	-0.1%	7

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

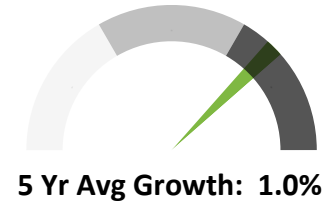
Butler Employment



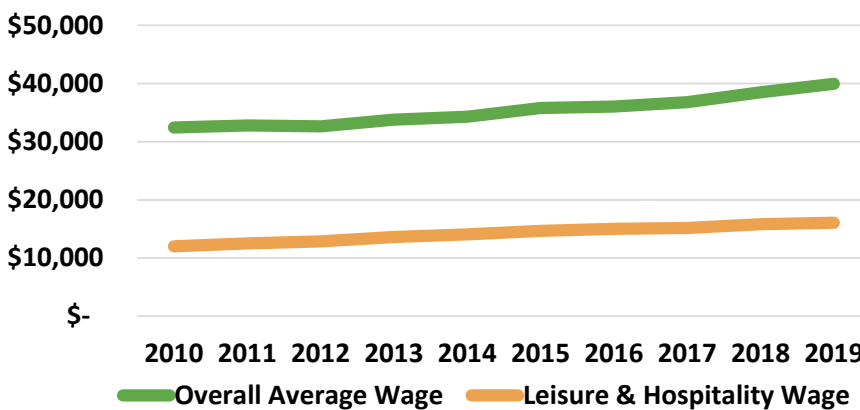
Total Population



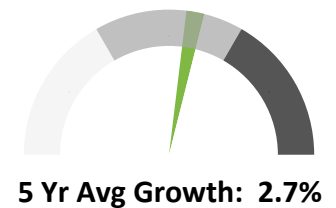
Leisure Employment



Butler Average Wages

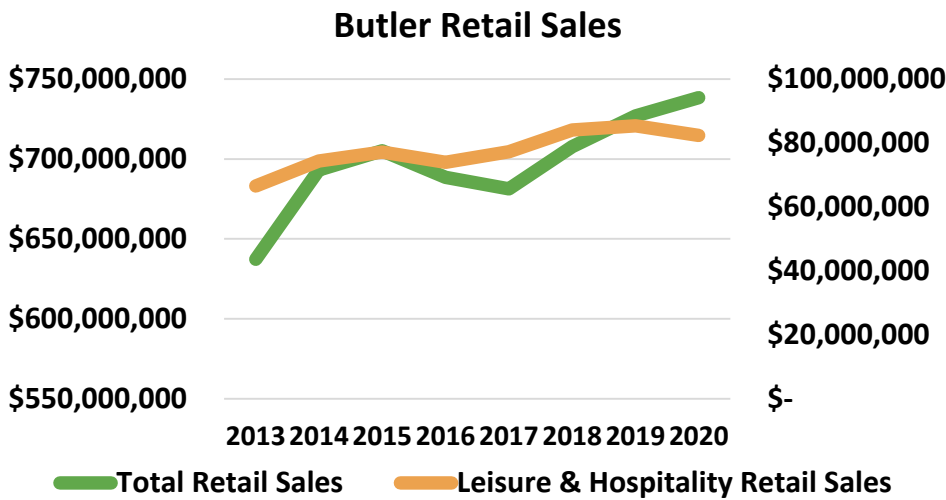


Average Leisure Wages



BUTLER COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$726,899,006	\$738,474,090	1.6%	0.9%	13
Leisure & Hospitality Retail Sales	\$85,406,257	\$82,409,238	-3.5%	1.3%	12
Per Capita Retail Sales	\$11,173.09	\$11,289.06	1.0%	0.7%	17
Per Capita L&H Retail Sales	\$1,312.77	\$1,259.79	-4.0%	1.1%	14
County Pull Factor (All Sales)	0.74	0.74	-0.1%	-0.4%	11
County Pull Factor (L&H Sales)	0.67	0.75	12.3%	1.6%	14

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

El Dorado Park had the fourth-largest market area, in terms of population, of Kansas' state parks. The area's leisure and hospitality employment share was sixth-highest among state parks and average wage was seventh-highest, though its average annual leisure and hospitality wage of \$16,068 in 2019 was still modestly lower than the state average of \$17,333. Despite the high level of leisure employment, the area's pull factor for this sectors' retail sales was only 0.75, indicating that hospitality spending per capita was 25 percent below the state average. A lower pull factor is a sign that residents may be spending a disproportionate amount of the leisure dollars outside the local area.

Total Taxable Retail Sales



5 Yr Avg Growth: 0.9%

Leisure Retail Sales



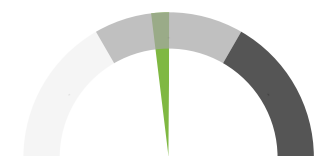
5 Yr Avg Growth: 1.3%

County Pull Factor (All)



5 Yr Avg Growth: -0.4%

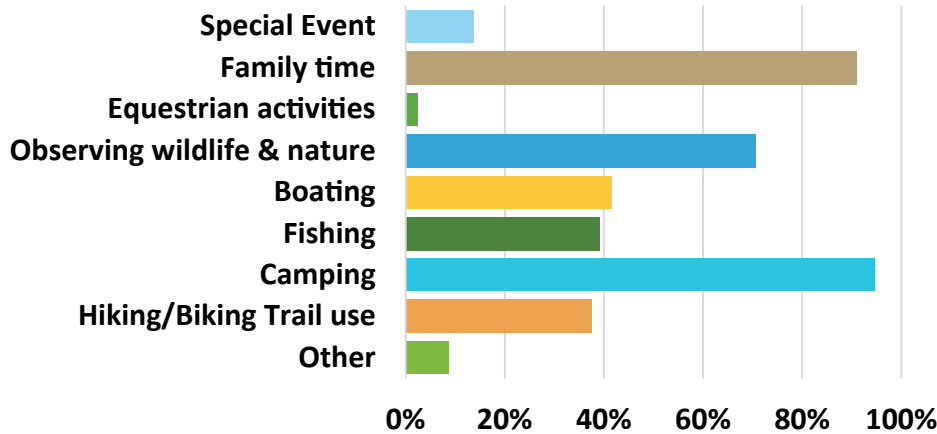
County Pull Factor (L&H)



5 Yr Avg Growth: 1.6%

Visitor Survey

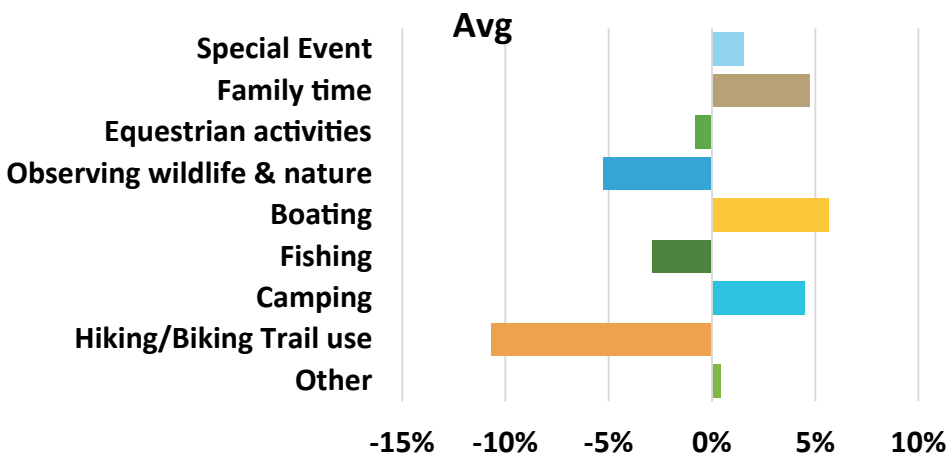
Park Visitor Activities



At El Dorado State Park, more than 90 percent of survey respondents engaged in camping and family time on their most recent visit. More than 40 percent of respondents went boating, a rate 5.6 percentage points higher than the state average.

Source: CEDBR

Park Visitor Activities Relative to State



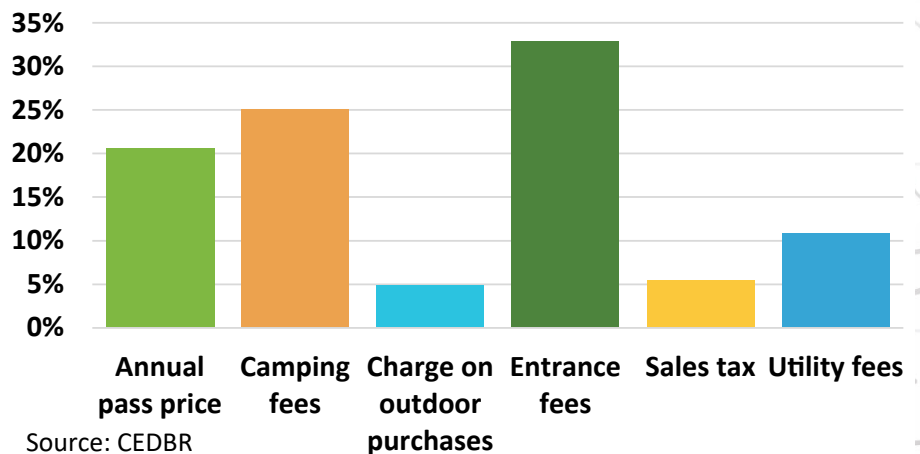
Hiking and cycling were relatively unpopular at the park, with these activities being participated in a rate 10.7 percentage points lower than in the state park system overall.

Source: CEDBR

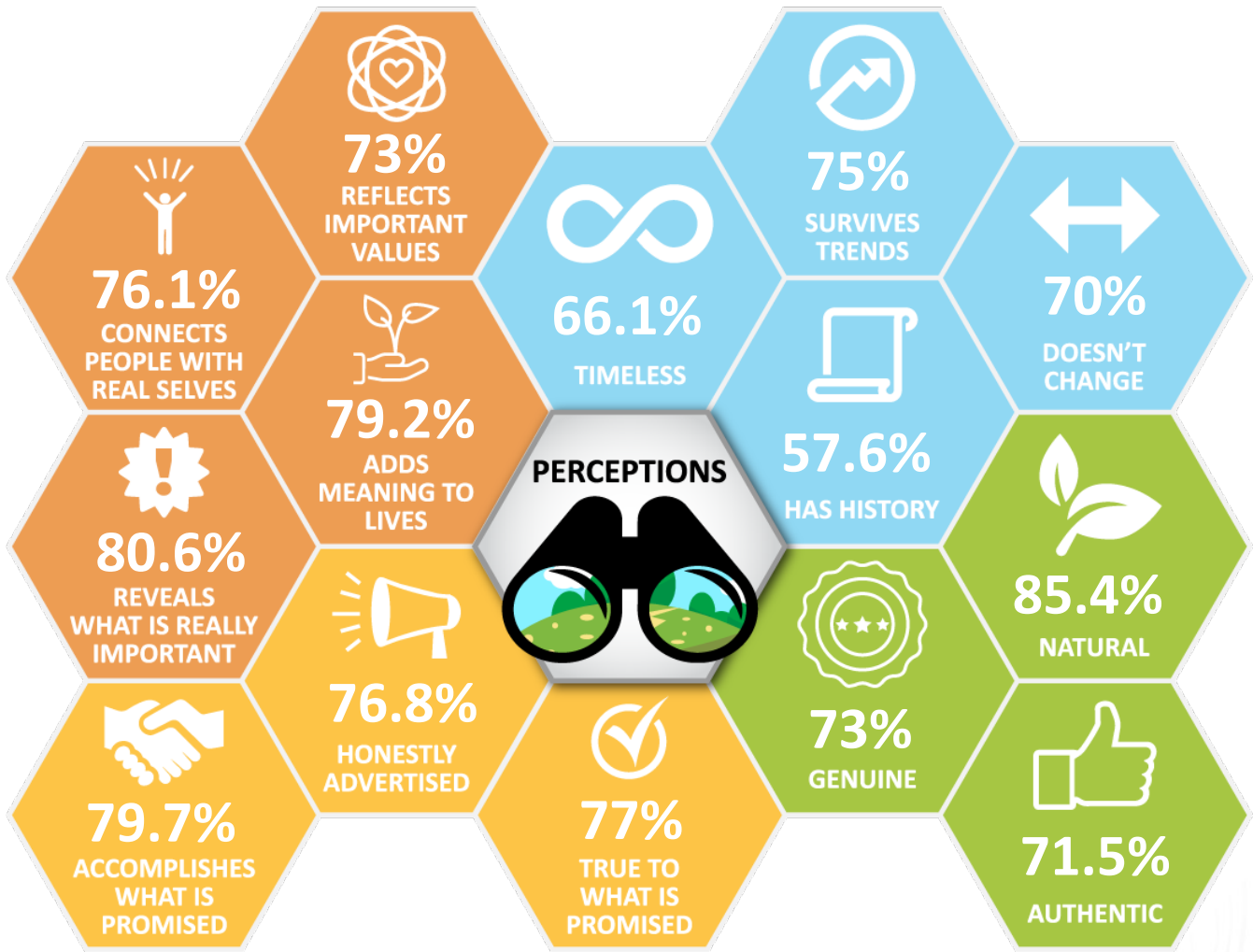
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



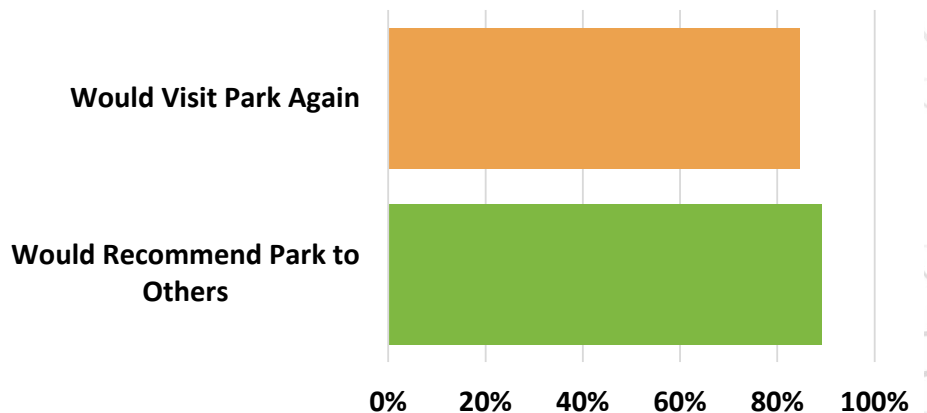
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 673
 Source: CEDBR survey 2020

Survey respondents who visited El Dorado State Park were 4.6 percentage points more likely than the state average to plan to revisit the park within the next 12 months, an indication that respondents were frequent users of the park. Despite the desire to return to the park, respondents gave the park below-state-average rankings in every perception category, with the largest difference in perceiving the park as authentic, 10.6 percentage points below the state average.

Park Visitor Satisfaction



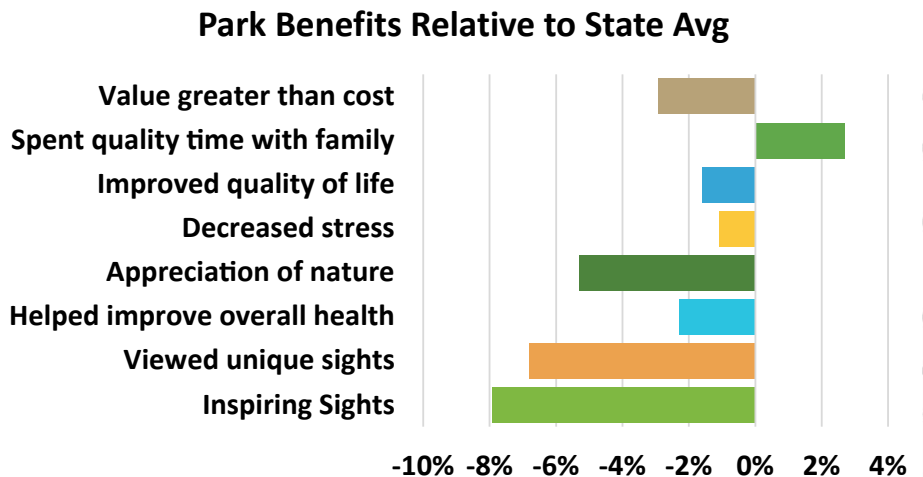
Source: CEDBR

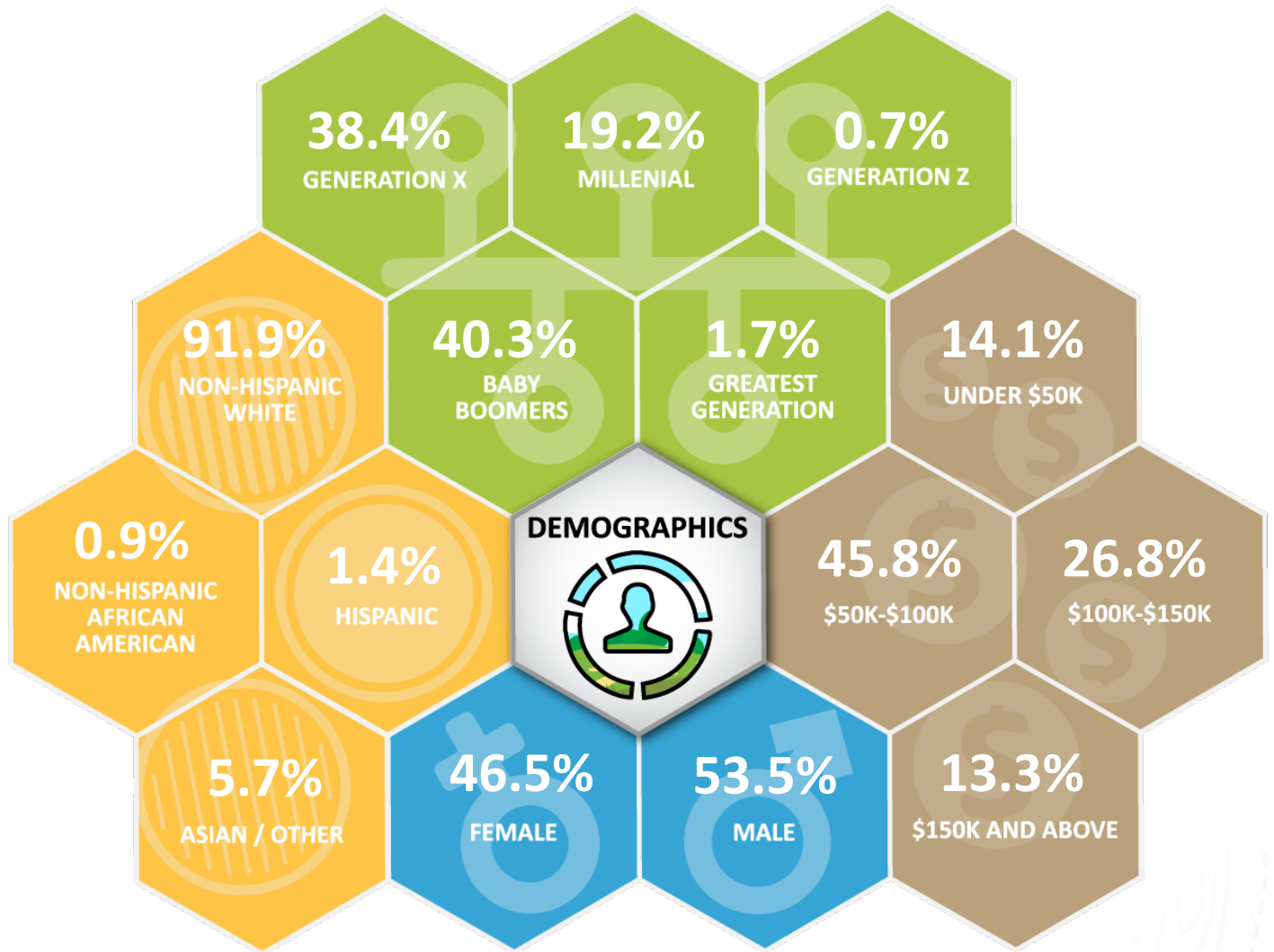


Among survey respondents who visited El Dorado State Park, almost 9 in 10 valued their visit more than its cost. Nearly 94 percent of respondents benefited from the quality time they spent with their family members at the park, the third-highest level of all Kansas state parks. Each of the benefit categories was experienced by at least two-thirds of the respondents, though, except for quality time, the benefits were experienced at rates 1 to 8 percentage points lower than the state park system average.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	71%	79%	75%
Viewed unique sights	71%	79%	74%
Helped Improve Overall Health	64%	71%	71%
Appreciation of nature	71%	76%	69%
Decreased stress	85%	93%	86%
Improved Quality time with Family	76%	86%	79%
Spent quality time with family	92%	98%	93%
Value greater than cost	90%	89%	93%

Source: CEDBR

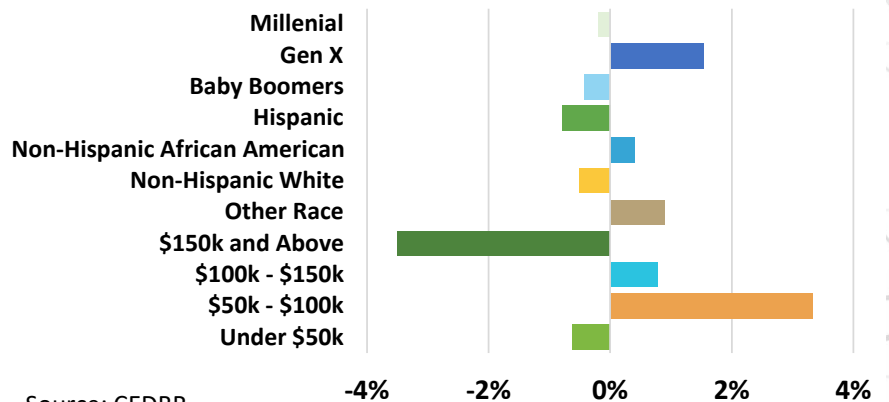




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Among survey respondents who visited El Dorado State Park, the share of those earning \$50,000 to \$100,000 was higher than average, and the share earning \$150,000 and above was lower than average, leading to the average income of visitors to the park to be below that of the average state park. More than 9 percent of respondents were people of color, a share 0.6 percentage points higher than the average state park. The park's age demographics were very similar to the overall state park system, with the average respondent less than a half-year younger than the overall system.

Park Visitor Demographics Relative to State Avg



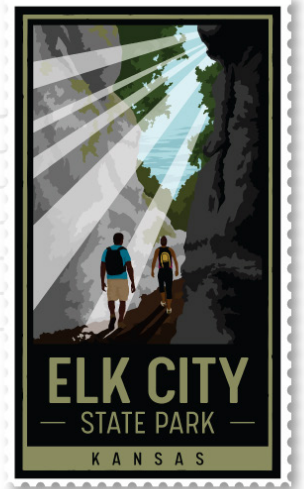
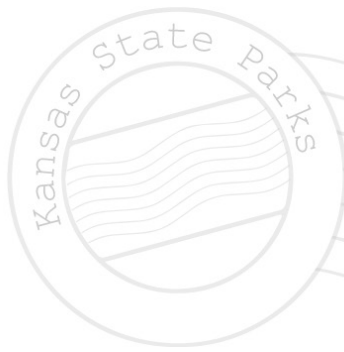
Source: CEDBR

ELK CITY STATE PARK | MONTGOMERY COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











Elk City State Park

	DIRECT 	INDIRECT 	INDUCED 	TOTAL
LABOR	\$161,275	\$2,907,042	\$469,088	\$3,537,408
EMPLOYMENT	4	108	12	124
OUTPUT	\$87,295	\$5,144,005	\$1,683,584	\$6,914,884

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION

INDUSTRY	LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 	\$1,123	-	\$7,885
Mining 	\$1,180	-	\$15,040
Construction 	\$9,734	-	\$32,549
Manufacturing 	\$14,669	-	\$191,268
TIPU 	\$146,592	3	\$979,051
Trade 	\$2,107,577	84	\$2,374,595
Service 	\$1,217,939	37	\$3,244,992
Government 	\$38,593	0	\$69,504
Total	\$3,537,408	124	\$6,914,884

Source: CEDBR

PARK TAX REVENUE

	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$674,264	\$502,066	\$50,370	\$70,625	\$7,743
2020	\$868,359	\$646,604	\$64,882	\$90,708	\$9,909

Source: CEDBR

PARK- REGIONAL

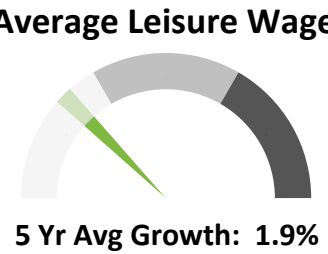
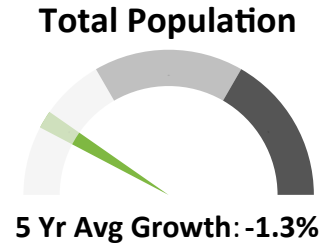
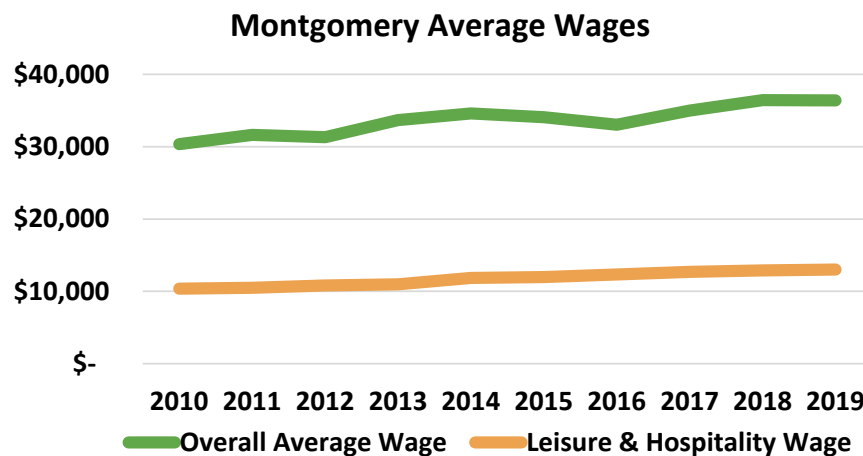
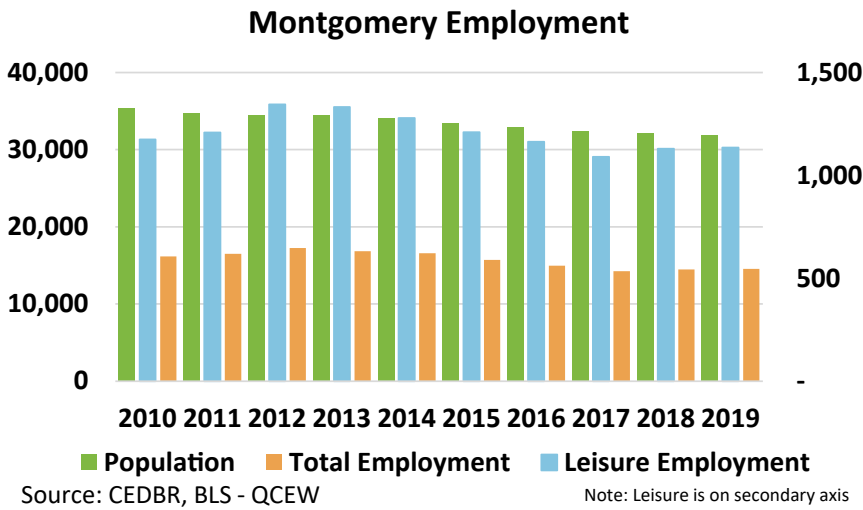
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,687,746	\$849,660	\$3,399,936	\$1,094,854
Employment	98	26	124	34
Output	\$5,039,292	\$1,875,590	\$6,379,582	\$2,415,185

Source: CEDBR

Market Data

MONTGOMERY COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	32,120	31,829	-0.9%	-1.3%	22
Total Employment	14,464	14,539	0.5%	-2.6%	24
Leisure & Hospitality Employment	1,130	1,135	0.4%	-2.4%	20
Leisure & Hospitality Share	7.8%	7.8%	0.0%	0.2%	15
Average Annual Wage (All Industries)	\$36,454	\$36,394	-0.2%	1.0%	23
Average Annual Wage (Leisure & Hosp)	\$12,906	\$13,032	1.0%	1.9%	20
L&H Employment Location Quotient	0.84	0.84	0.1%	-0.4%	12

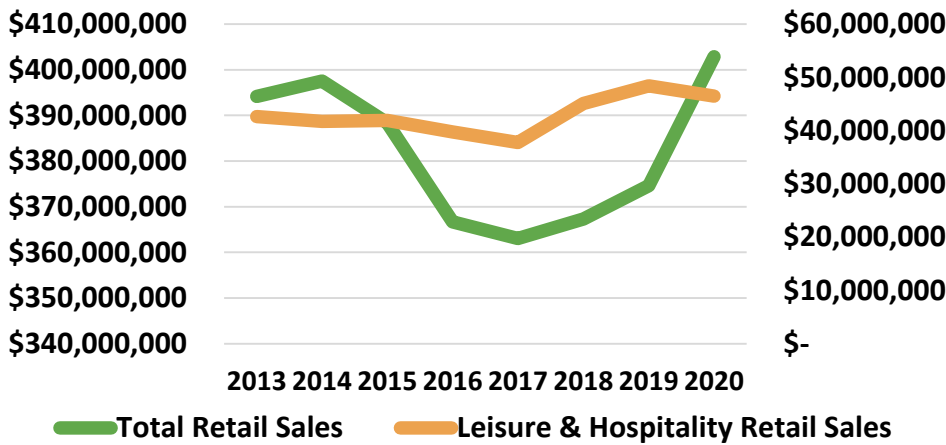
¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



MONTGOMERY COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$374,635,698	\$402,880,629	7.5%	0.7%	14
Leisure & Hospitality Retail Sales	\$48,416,274	\$46,501,285	-4.0%	2.1%	10
Per Capita Retail Sales	\$11,663.63	\$12,657.66	8.5%	2.1%	10
Per Capita L&H Retail Sales	\$1,507.36	\$1,460.97	-3.1%	3.5%	8
County Pull Factor (All Sales)	0.78	0.78	0.6%	-0.9%	13
County Pull Factor (L&H Sales)	0.77	0.87	13.5%	4.0%	8

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Montgomery Retail Sales

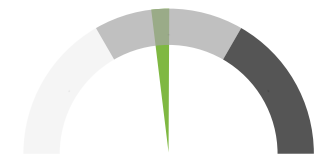


Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

The Elk City Park market area contracted by more than 3,200 residents from 2014 to 2019, reaching a population of 31,829, one of the sharpest population declines among Kansas state park market areas. The area’s employment declined at the third-fastest rate among park market areas, outpacing the loss of population and decreasing by 12.3 percent in the past five years. Retail sales in the area have continued to be strong, growing at approximately the same rate as the state did overall from 2015 to 2020. The leisure and hospitality pull factor of 0.87 indicates that hospitality spending per person in the area was only slightly lower than the state average.

Total Taxable Retail Sales



5 Yr Avg Growth: 0.7%

Leisure Retail Sales



5 Yr Avg Growth: 2.1%

County Pull Factor (All)



5 Yr Avg Growth: -0.9%

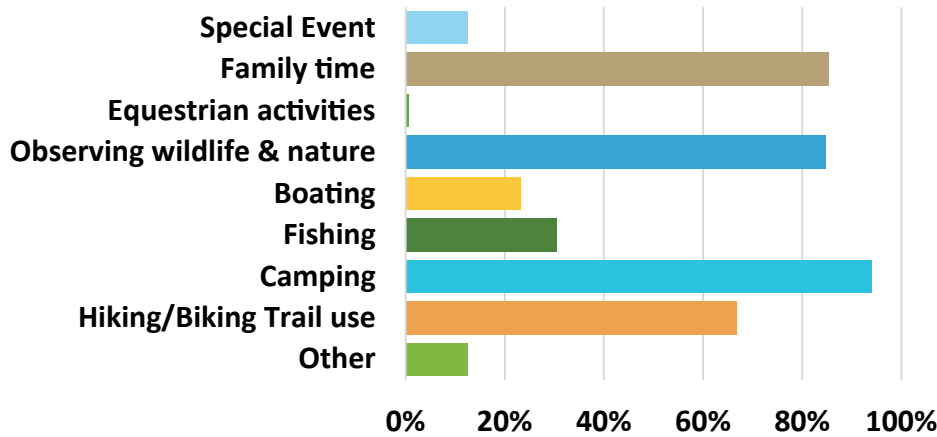
County Pull Factor (L&H)



5 Yr Avg Growth: 4.0%

Visitor Survey

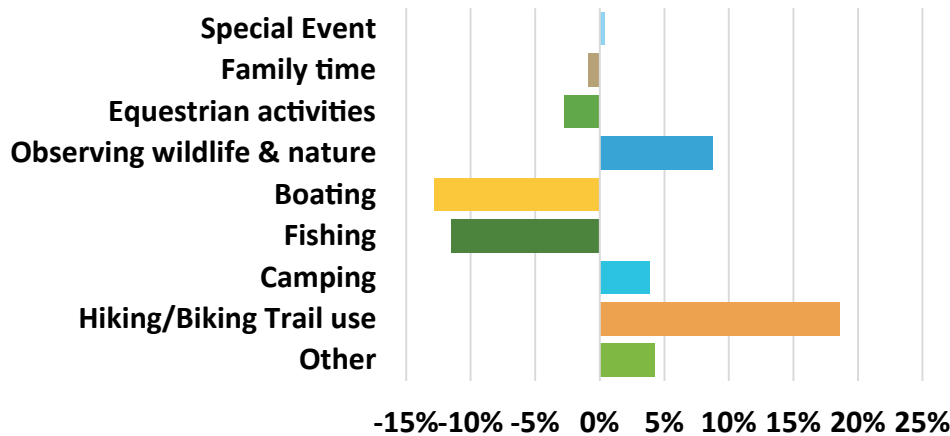
Park Visitor Activities



Elk City State Park was a destination for hikers and cyclists, with two-thirds of survey respondents reporting engaging in those activities, a rate 18.6 percentage points higher than the state average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



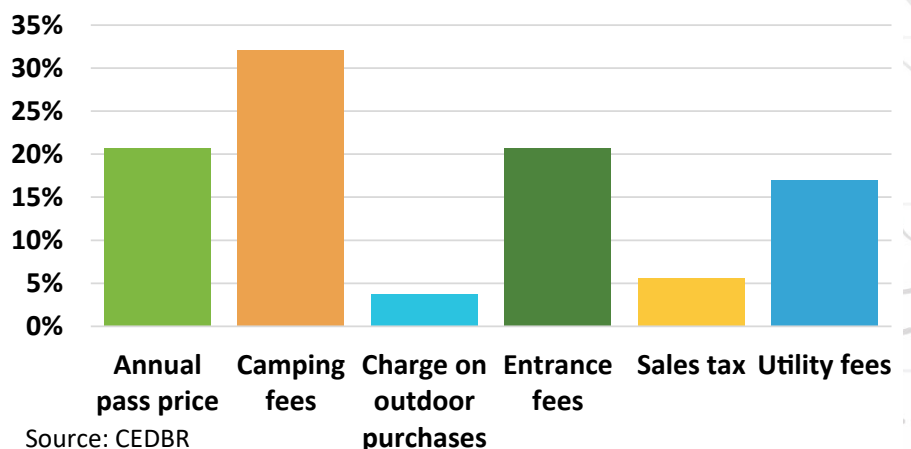
The park was relatively unpopular for fishing and boating activities, as respondents reported those at a rate 11.5 and 12.8 percentage points lower than average, respectively. Among supporters for increased park fees, 32.1 percent would prefer the increase to be on camping fees.

Source: CEDBR

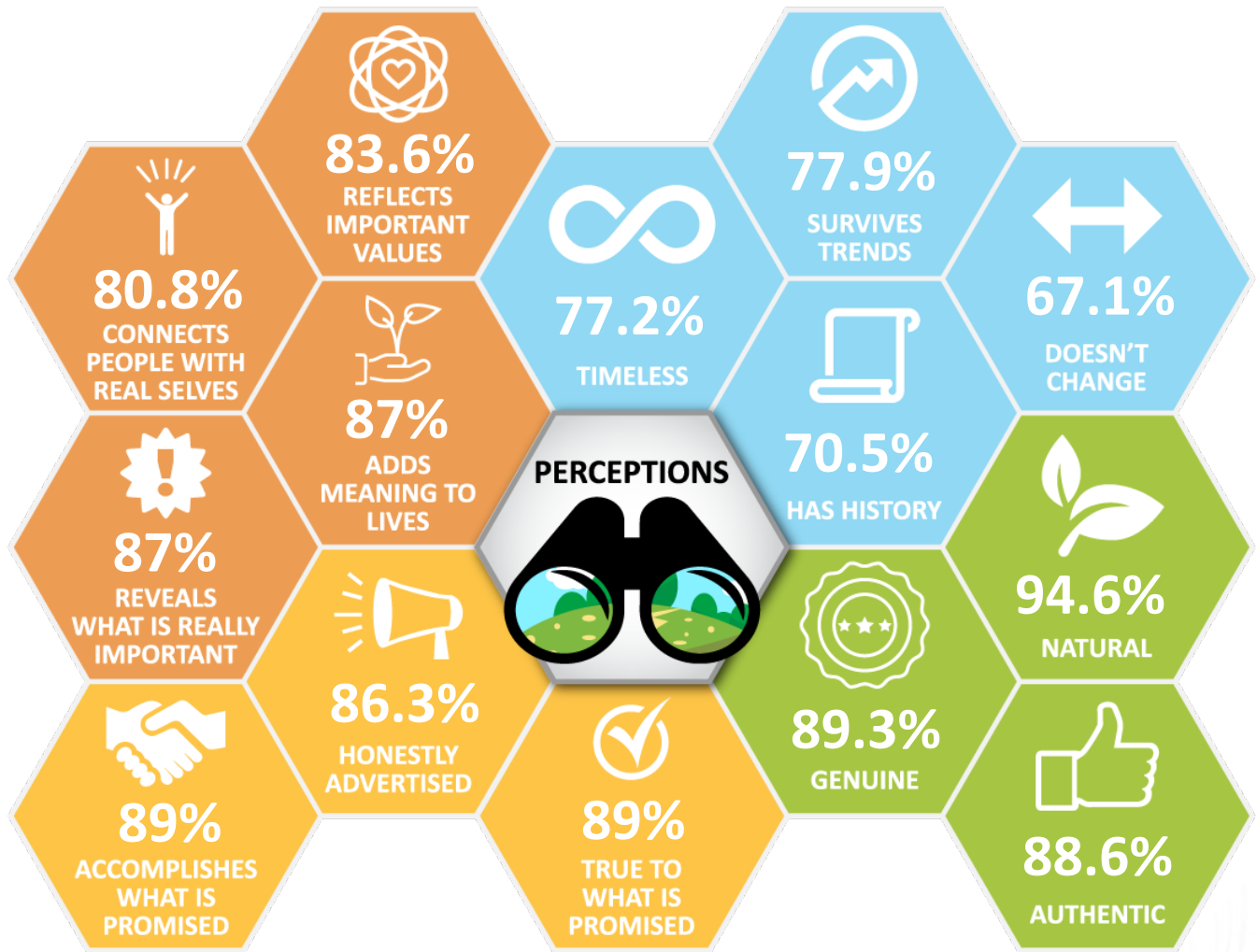
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



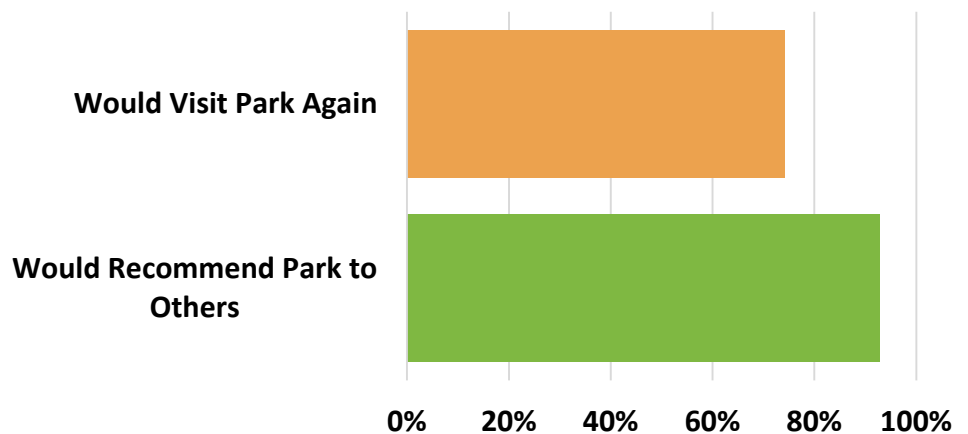
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 197
 Source: CEDBR survey 2020

Elk City State Park received above state park system agreement from survey respondents in 10 of the 14 perception categories, signs of the vast majority of visitors enjoying their time at the park. Across the 14 categories, the park was rated 3.2 percentage points higher than the park system average. The perception of the park being authentic was the highest, with 6.5 percentage points higher than the average state park.

Park Visitor Satisfaction



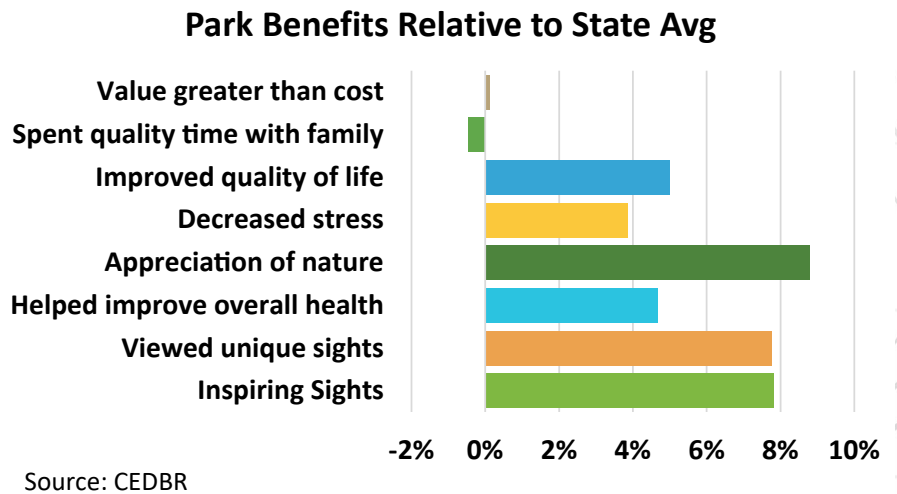
Source: CEDBR

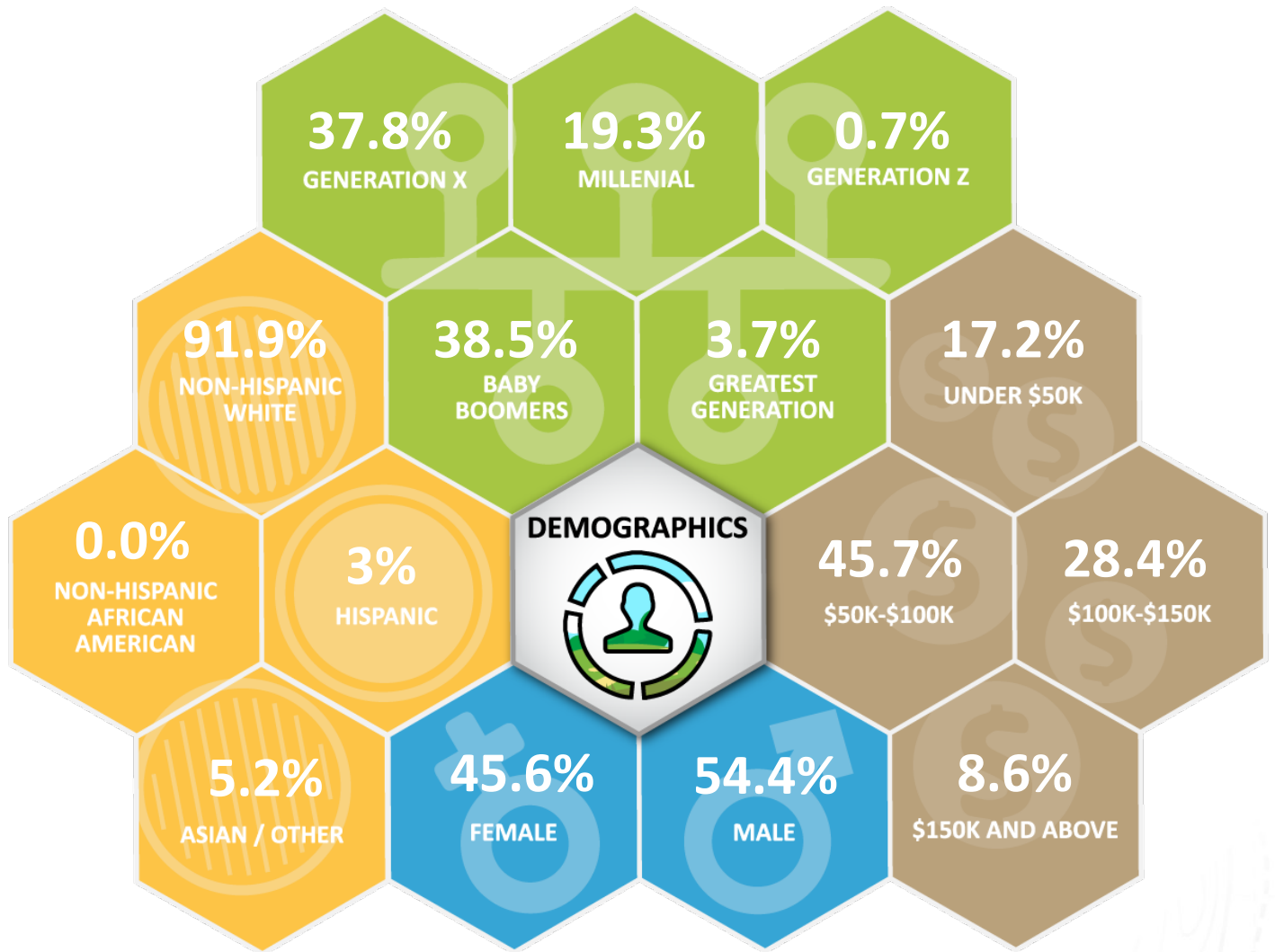


The benefits of inspiring sights, unique sights, and nature appreciation were experienced by survey respondents who visited Elk City State Park at rates 7 to 9 percentage points higher than the average state park. These were each in the top five state parks for each benefit in the state of Kansas. The park ranked above the state average for every benefit category asked on the survey except quality time spent with family, which the park underperformed the state park average by only 0.5 percentage points.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	88%	96%	92%
Viewed unique sights	85%	90%	96%
Helped Improve Overall Health	75%	73%	85%
Appreciation of nature	83%	88%	85%
Decreased stress	90%	94%	96%
Improved Quality time with Family	87%	90%	88%
Spent quality time with family	90%	90%	92%
Value greater than cost	94%	92%	100%

Source: CEDBR

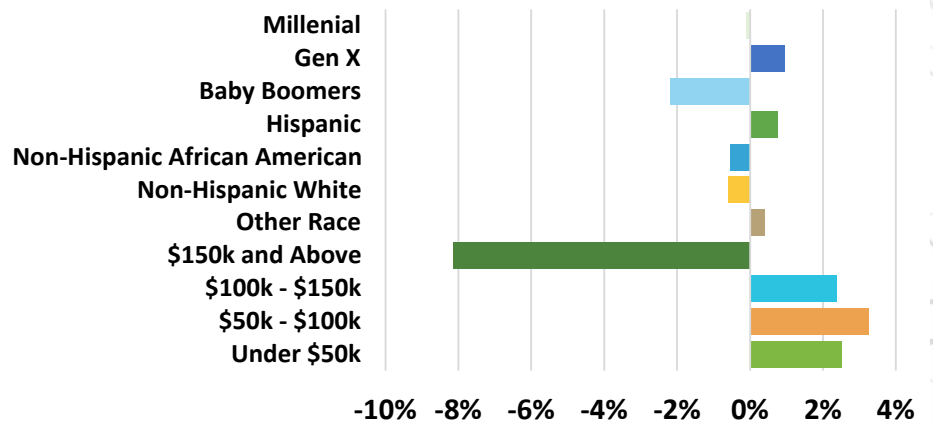




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Elk City State Park’s survey respondents had the lowest share of earners with \$150,000 and above of any Kansas state park, a rate approximately half of the overall park system. Each of the other three income categories were 2 to 3 percentage points higher than average, a sign that Elk City’s respondents had lower than average incomes. Elk City’s generational demographics were mainly similar to the average state park, but the Baby Boomer generation’s share of visitors was 2.2 percentage points lower than average.

Park Visitor Demographics Relative to State Avg



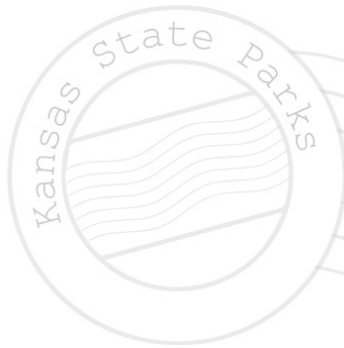
Source: CEDBR

FALL RIVER STATE PARK | GREENWOOD COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$12,000	\$2,427,904	\$318,922	\$2,758,835
EMPLOYMENT	0	136	8	144
OUTPUT	\$49,969	\$5,311,587	\$1,251,403	\$6,612,956

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$3,066	-	\$11,433
Mining		\$2,884	-	\$33,322
Construction		\$9,081	-	\$34,728
Manufacturing		\$10,040	-	\$94,216
TIPU		\$153,674	4	\$745,066
Trade		\$1,820,508	111	\$2,613,215
Service		\$736,095	28	\$3,023,909
Government		\$23,488	0	\$57,066
Total		\$2,758,835	144	\$6,612,956

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$587,534	\$885,509	\$62,963	\$64,579	\$5,921
2020	\$278,199	\$419,325	\$29,810	\$30,692	\$2,818

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,689,531	\$1,069,301	\$818,142	\$506,926
Employment	112	32	53	15
Output	\$4,170,272	\$2,442,682	\$2,061,252	\$1,159,773

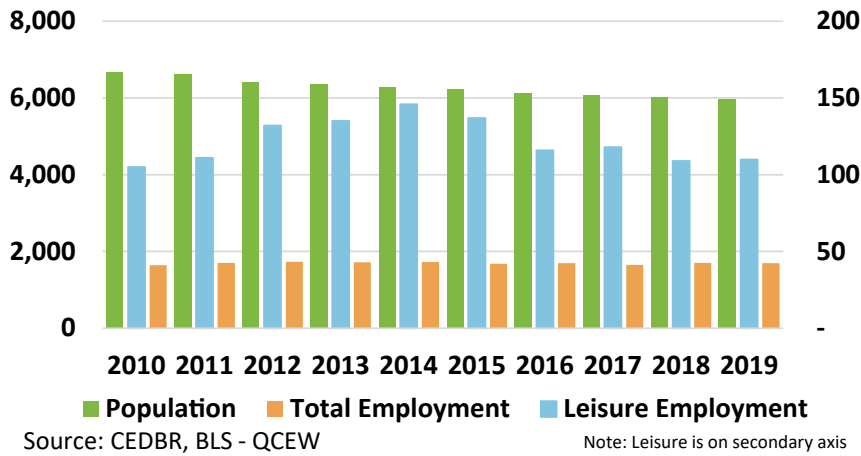
Source: CEDBR

Market Data

GREENWOOD COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	6,055	5,982	-1.2%	-1.1%	21
Total Employment	1,700	1,694	-0.4%	-0.3%	14
Leisure & Hospitality Employment	109	110	0.9%	-5.5%	25
Leisure & Hospitality Share	6.4%	6.5%	0.1%	-5.2%	24
Average Annual Wage (All Industries)	\$31,516	\$32,595	3.4%	2.7%	9
Average Annual Wage (Leisure & Hosp)	\$9,868	\$9,361	-5.1%	3.3%	8
L&H Employment Location Quotient	0.69	0.70	1.4%	-5.8%	19

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Greenwood Employment



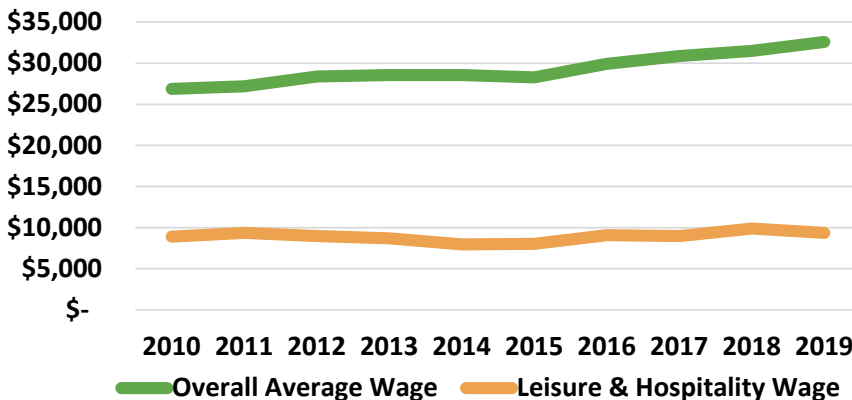
Total Population



Leisure Employment



Greenwood Average Wages



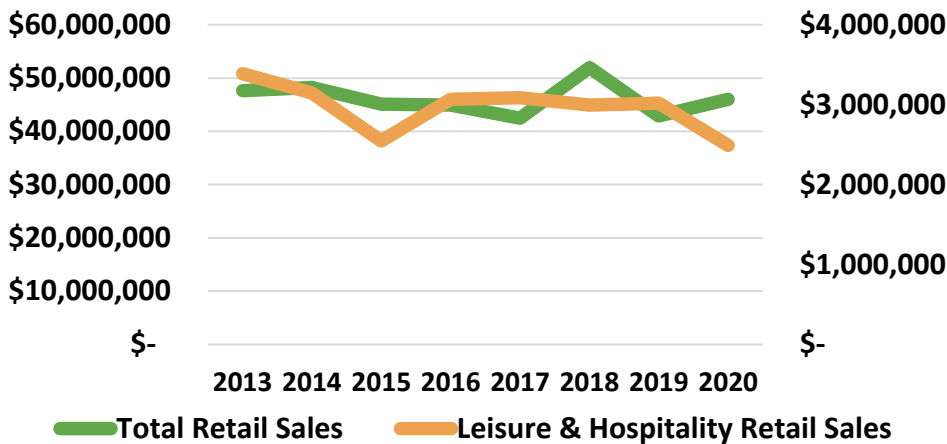
Average Leisure Wages



GREENWOOD COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$42,869,716	\$45,978,252	7.3%	0.4%	15
Leisure & Hospitality Retail Sales	\$3,018,162	\$2,491,966	-17.4%	-0.4%	18
Per Capita Retail Sales	\$7,080.05	\$7,686.10	8.6%	1.5%	13
Per Capita L&H Retail Sales	\$498.46	\$416.58	-16.4%	0.7%	16
County Pull Factor (All Sales)	0.58	0.48	-18.3%	-2.3%	20
County Pull Factor (L&H Sales)	0.25	0.25	-2.2%	1.2%	16

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Greenwood Retail Sales



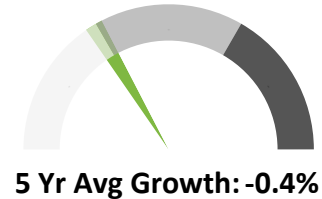
Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



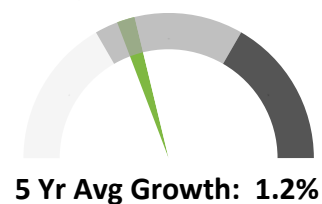
Leisure Retail Sales



County Pull Factor (All)



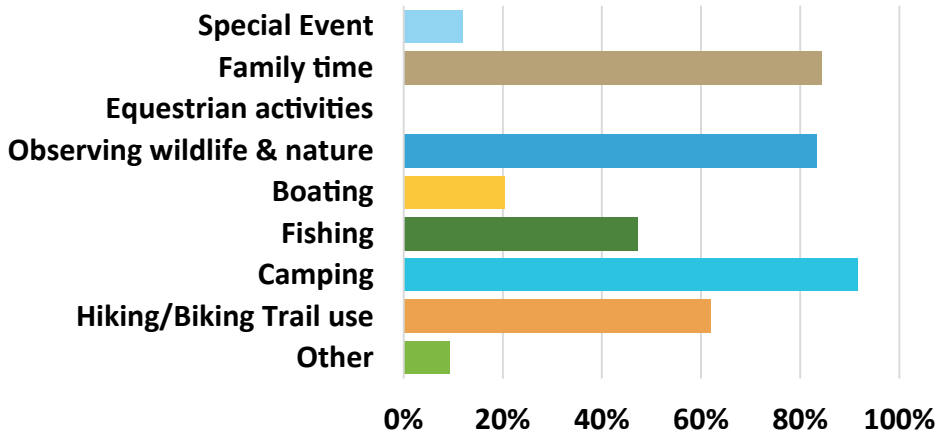
County Pull Factor (L&H)



The Fall River Park market area had one of the fastest contractions in both population and leisure and hospitality employment among Kansas state park market areas from 2014 to 2019, declining 5.5 percent in population and 24.7 percent in hospitality employment in that time. Despite these declines, hospitality wages grew robustly, increasing 17.6 percent, though average annual hospitality wages were still only 54 percent as high as the state average in 2019. The area had one of the lowest hospitality retail pull factors among state park areas in 2020, at 0.25, a sign that leisure and hospitality spending in the region was approximately one quarter the state average.

Visitor Survey

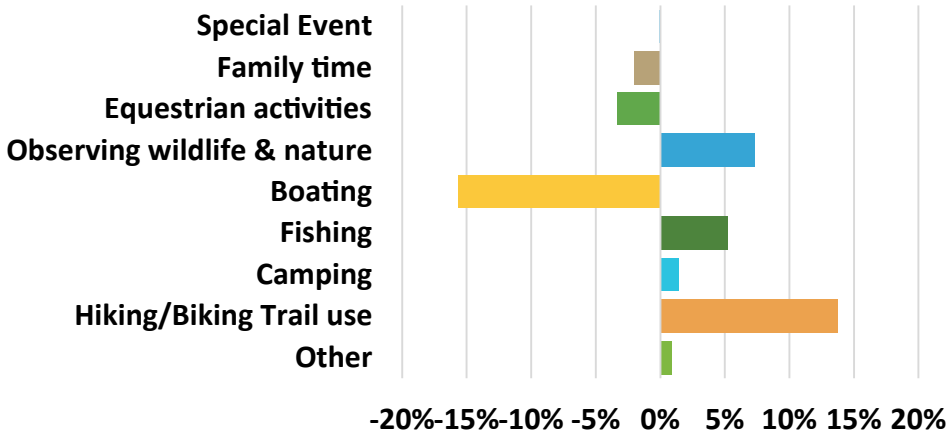
Park Visitor Activities



At Fall River State Park, the three most popular activities were camping, family time, and observing nature. The share of respondents who reported engaged in observing nature was 7.3 percentage points higher than the state average, while the share reporting hiking activities was 13.7 percentage points higher than average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



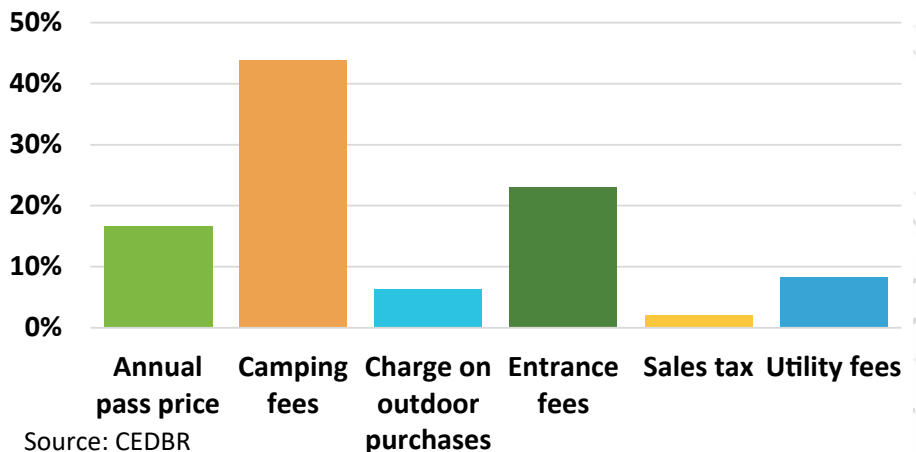
The park's respondents had one of the highest levels of support for increased fees, at 68.6 percent, with a strong plurality supporting increased camping fees.

Source: CEDBR

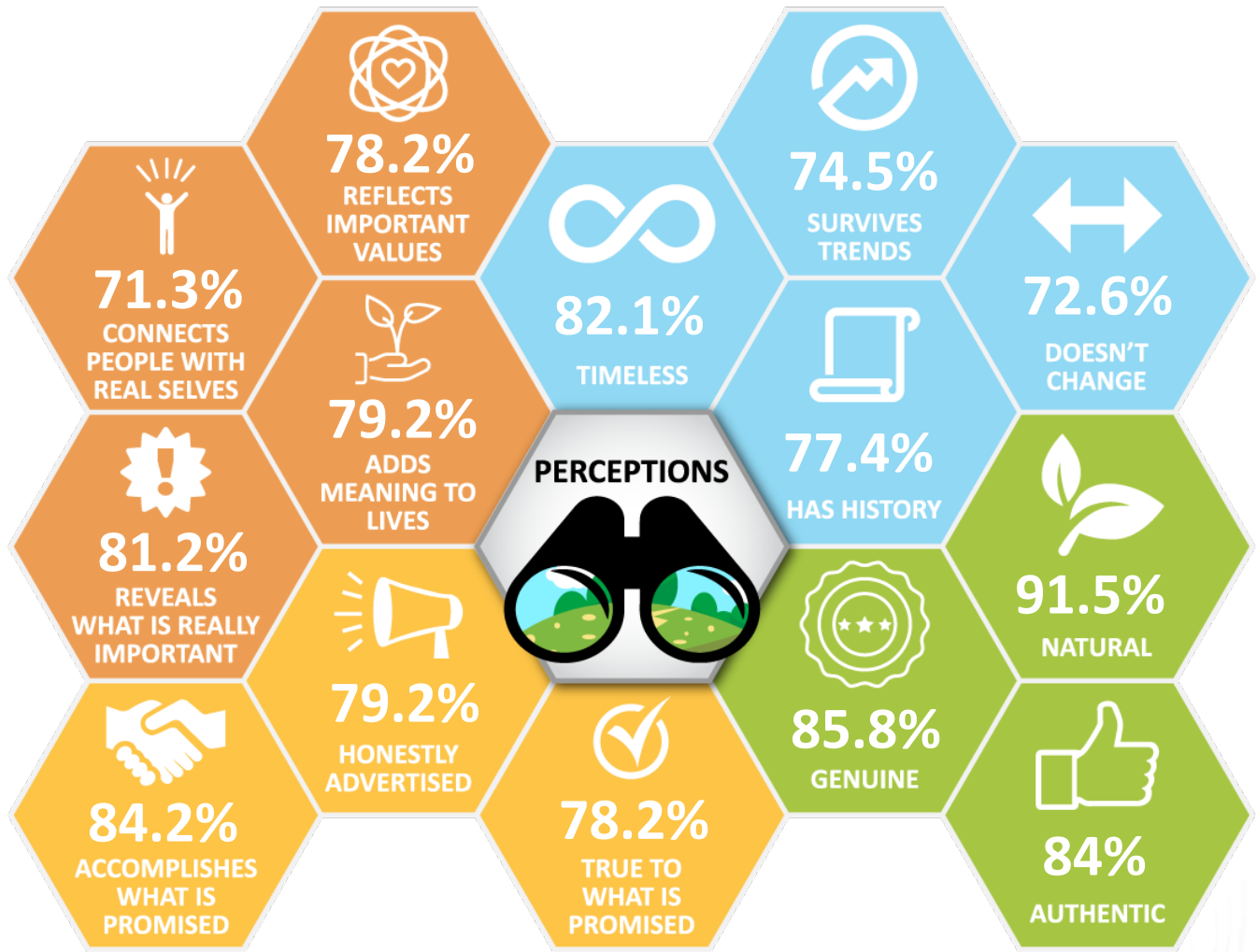
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



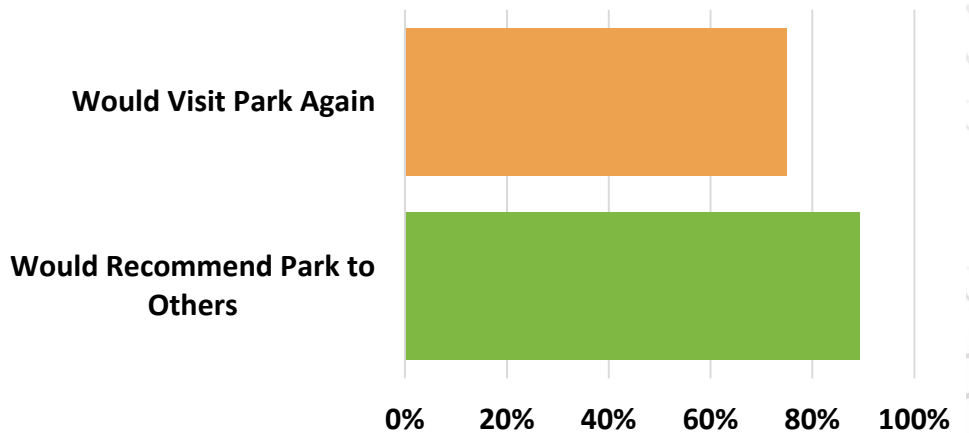
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 148
 Source: CEDBR survey 2020

Almost nine in ten survey respondents who visited Fall River State Park would recommend the park, a rate only 2.7 percentage points lower than the state park system average. The perceptions of the park most agreed with by survey respondents were that the park was natural and genuine. However, only 71.3 percent of respondents agreed that the park helped people connect with their real selves, a rate 7.3 percentage points lower than the state average.

Park Visitor Satisfaction



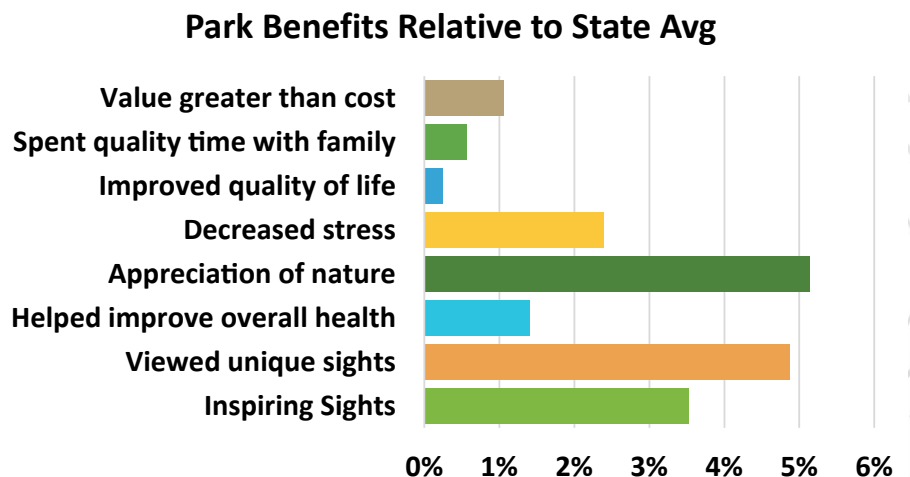
Source: CEDBR



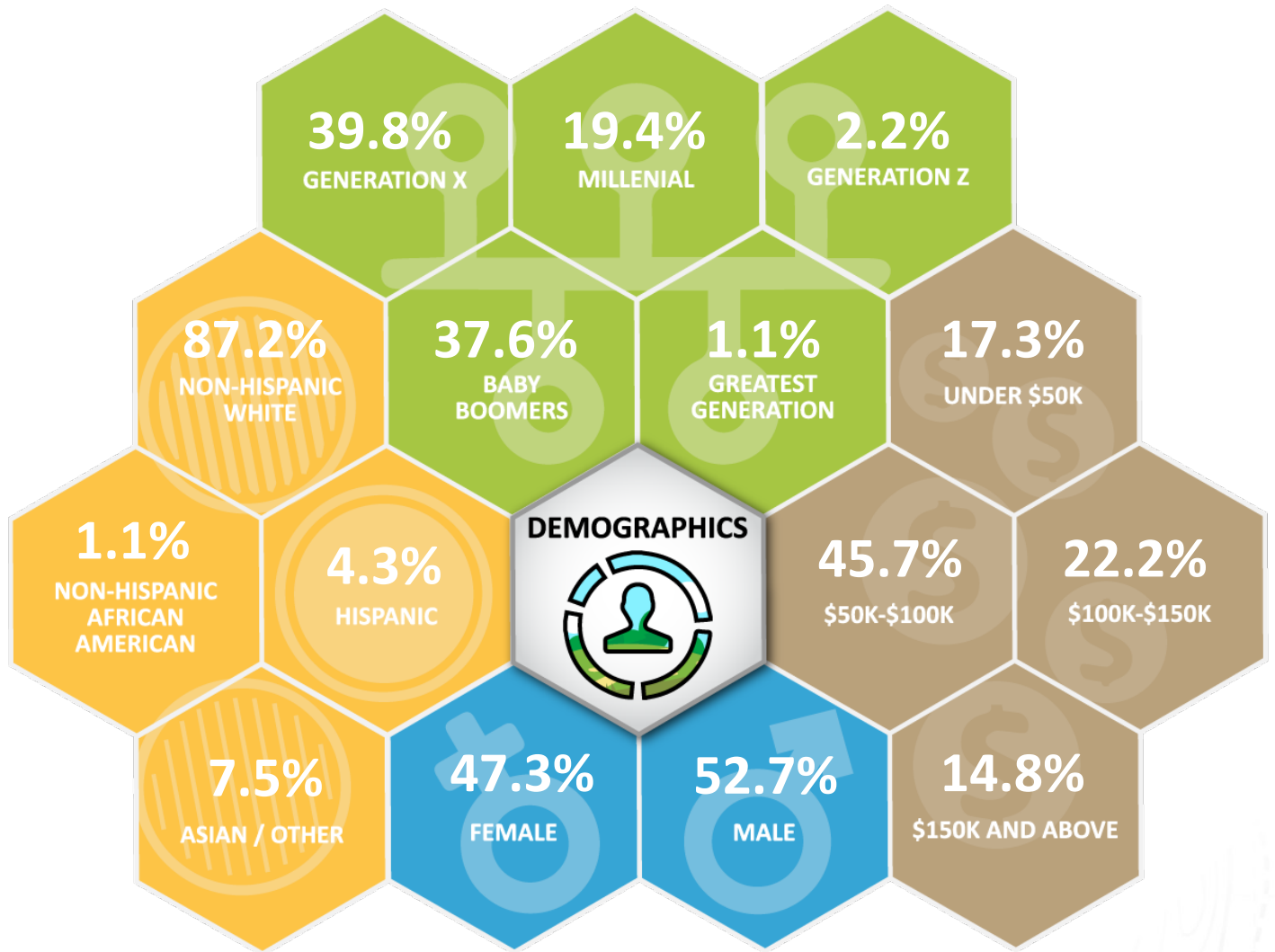
Survey respondents who visited Fall River State Park valued their visit as greater than its cost at the sixth-highest rate of any Kansas state park, with 93.8 percent of respondents agreeing. Visitors found above-average levels of each benefit asked on the survey at the park, with nature appreciation and unique sights being rated the most highly above average. Millennials had the highest satisfaction of any age demographic at the park, as all Millennial-aged respondents reported receiving a value from the park greater than its cost.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	80%	95%	94%
Viewed unique sights	89%	92%	83%
Helped Improve Overall Health	77%	78%	61%
Appreciation of nature	77%	81%	94%
Decreased stress	83%	97%	89%
Improved Quality time with Family	77%	89%	89%
Spent quality time with family	86%	100%	94%
Value greater than cost	91%	95%	100%

Source: CEDBR



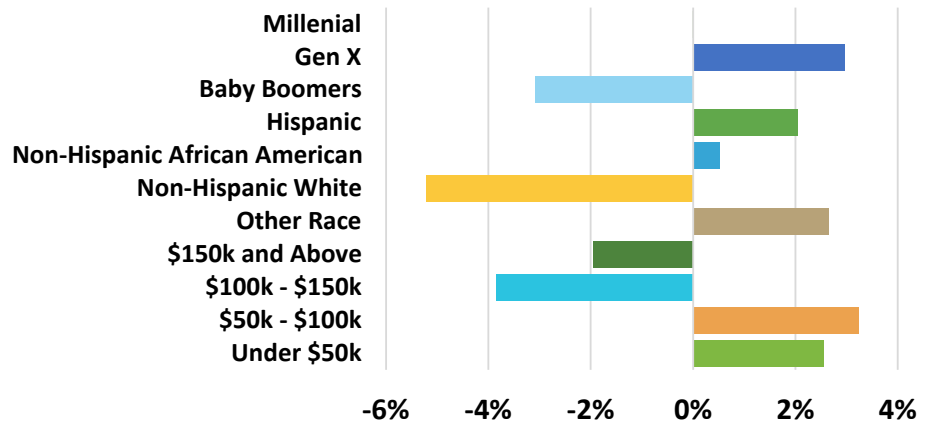
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Approximately 63 percent of survey respondents who visited Fall River State Park earned \$100,000 or less, a share 5.8 percentage points greater than the overall state park system. The share of the park's respondents who identified as people of color was 12.8 percent, the highest of any Kansas state park, with 4.3 percent identifying as Hispanic and 1.1 as non-Hispanic African American. Slightly more than three-quarters of respondents were from the Baby Boom generation and Generation X, while 19.4 percent were from the Millennial generation.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

Economic Impact



*Visitor Days



Kansas State Parks











Flint Hills Trail State Park

	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$10,000	\$645,166	\$102,071	\$757,237
EMPLOYMENT	3	27	3	33
OUTPUT	\$63,700	\$1,409,893	\$373,740	\$1,847,333

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$364	-	\$1,966
Mining		\$904	-	\$11,698
Construction		\$3,657	-	\$12,523
Manufacturing		\$3,812	-	\$43,934
TIPU		\$47,768	1	\$262,327
Trade		\$450,740	20	\$552,706
Service		\$238,465	11	\$936,396
Government		\$11,527	-	\$25,783
Total		\$757,237	33	\$1,847,333

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$152,679	\$129,362	\$12,966	\$17,534	\$2,063
2020	\$323,738	\$274,312	\$27,482	\$36,778	\$4,373

Source: CEDBR

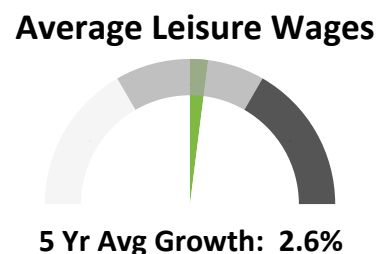
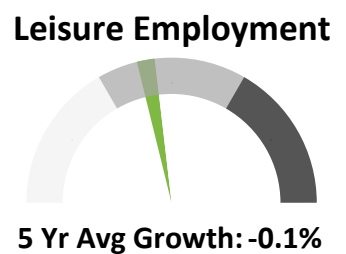
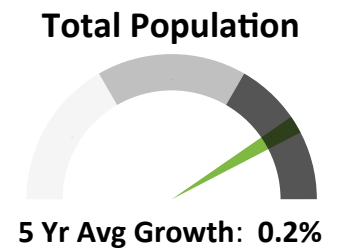
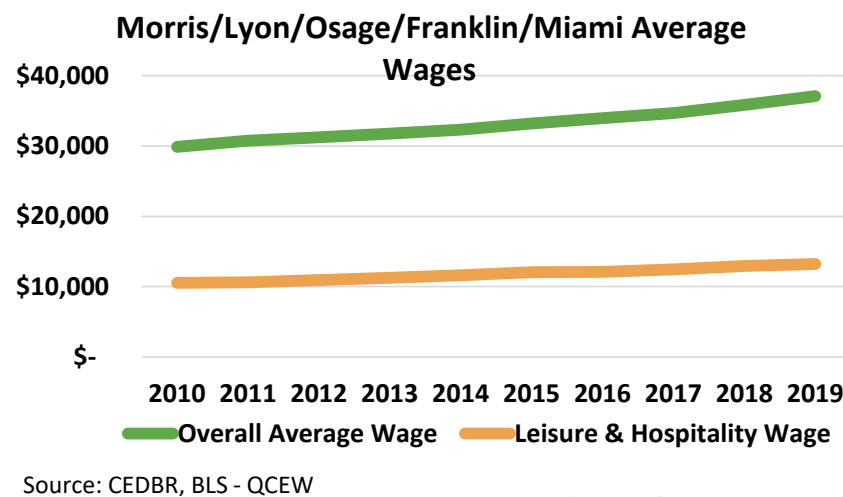
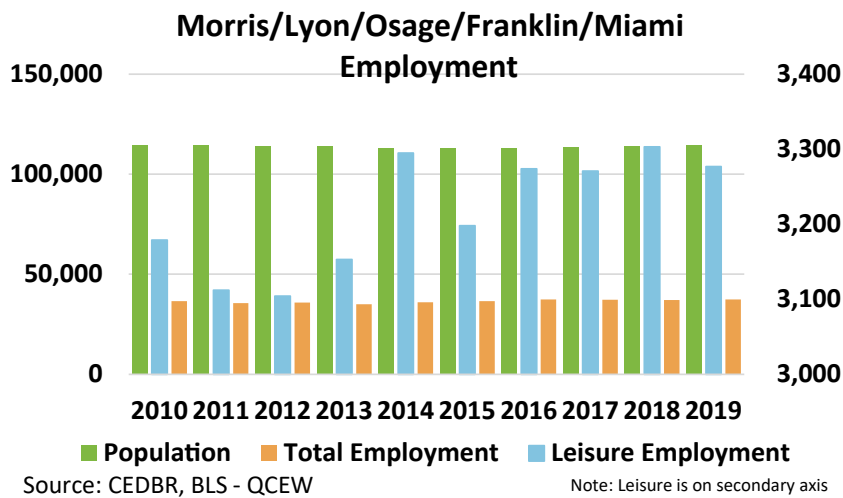
PARK - REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$511,432	\$245,805	\$1,205,620	\$517,529
Employment	26	7	50	14
Output	\$1,247,415	\$599,918	\$2,438,566	\$1,260,981

Source: CEDBR

Market Data

MORRIS/LYON/OSAGE/FRANKLIN/MIAMI COUNTIES					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	114,179	114,545	0.3%	0.2%	5
Total Employment	37,167	37,344	0.5%	0.7%	5
Leisure & Hospitality Employment	3,303	3,277	-0.8%	-0.1%	15
Leisure & Hospitality Share	8.9%	8.8%	-0.1%	-0.8%	21
Average Annual Wage (All Industries)	\$35,853	\$37,070	3.4%	2.8%	7
Average Annual Wage (Leisure & Hosp)	\$12,926	\$13,235	2.4%	2.6%	13
L&H Employment Location Quotient	0.95	0.94	-1.1%	-1.4%	17

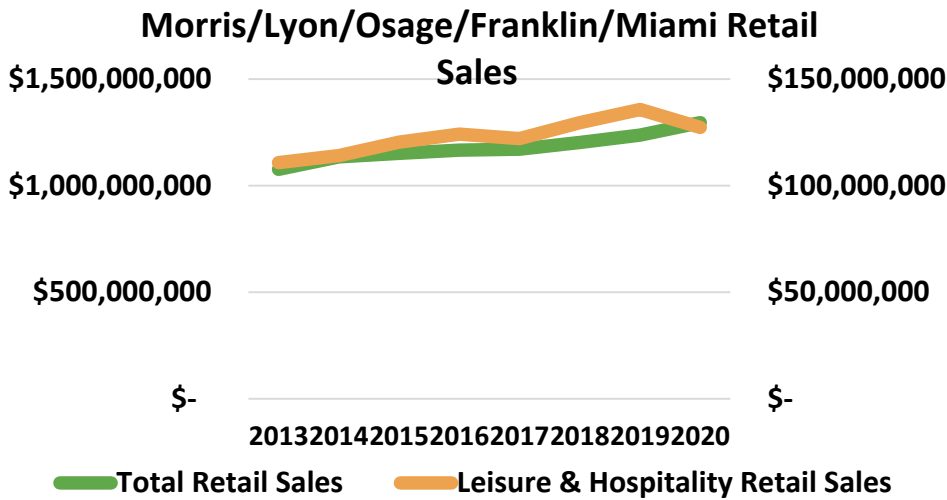
¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



MORRIS/LYON/OSAGE/FRANKLIN/MIAMI COUNTIES

	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$1,237,365,406	\$1,295,981,138	4.7%	2.4%	7
Leisure & Hospitality Retail Sales	\$135,738,618	\$127,270,681	-6.2%	1.1%	13
Per Capita Retail Sales	\$10,837.07	\$11,314.17	4.4%	2.2%	9
Per Capita L&H Retail Sales	\$1,188.82	\$1,111.10	-6.5%	0.9%	15
County Pull Factor (All Sales)	0.72	0.72	0.3%	0.4%	6
County Pull Factor (L&H Sales)	0.61	0.66	9.4%	1.4%	15

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

The Flint Hills Trail crosses five Kansas counties, and those five counties combined experienced population and employment growth, both approximately one percent faster than the state average from 2014 to 2019. While leisure and hospitality employment remained relatively flat in recent years, the area’s hospitality location quotient of 0.94 was a sign that hospitality employment was approximately the same share of employment locally as it was statewide. Both the overall pull factor and the leisure and hospitality pull factor for the area increased in the last five years, signs that the region’s retail sales are growing faster than the state’s overall.

Total Taxable Retail Sales



5 Yr Avg Growth: 2.4%

Leisure Retail Sales



5 Yr Avg Growth: 1.1%

County Pull Factor (All)



5 Yr Avg Growth: 0.4%

County Pull Factor (L&H)



5 Yr Avg Growth: 1.4%

GLEN ELDER STATE PARK | MITCHELL COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$158,041	\$2,749,308	\$381,240	\$3,288,582
EMPLOYMENT	4	126	9	140
OUTPUT	\$116,105	\$4,953,032	\$1,350,826	\$6,419,964

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$3,758	-	\$10,840
Mining		\$1,515	-	\$24,740
Construction		\$12,226	0	\$48,132
Manufacturing		\$7,934	-	\$92,499
TIPU		\$174,902	3	\$574,763
Trade		\$1,978,670	101	\$2,560,721
Service		\$1,083,522	36	\$3,041,488
Government		\$26,056	0	\$66,780
Total		\$3,288,582	140	\$6,419,964

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$646,057	\$702,963	\$73,820	\$76,658	\$6,149
2020	\$749,958	\$816,071	\$85,693	\$89,116	\$7,154

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,398,996	\$889,591	\$2,841,203	\$1,032,171
Employment	112	28	128	32
Output	\$4,445,355	\$1,974,608	\$5,194,512	\$2,291,856

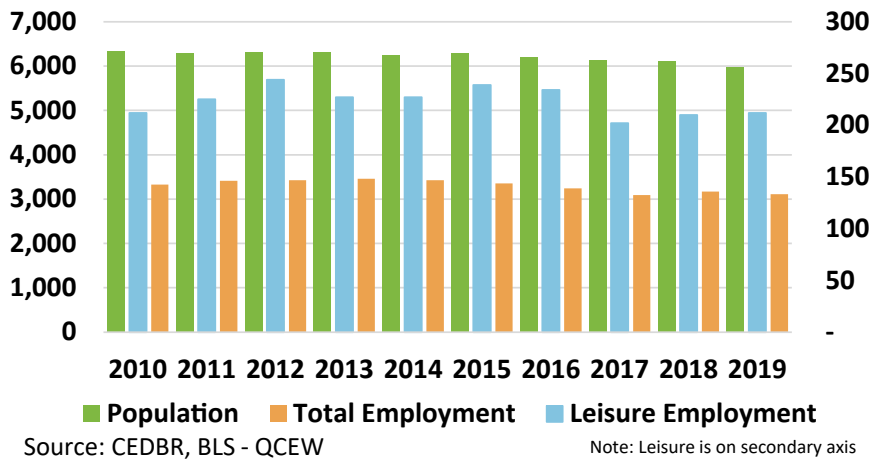
Source: CEDBR

Market Data

MITCHELL COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	6,150	5,979	-2.8%	-1.0%	18
Total Employment	3,172	3,109	-2.0%	-1.9%	20
Leisure & Hospitality Employment	210	212	1.0%	-1.4%	17
Leisure & Hospitality Share	6.6%	6.8%	0.2%	0.6%	9
Average Annual Wage (All Industries)	\$34,826	\$35,907	3.1%	1.9%	19
Average Annual Wage (Leisure & Hosp)	\$9,513	\$9,299	-2.2%	0.0%	24
L&H Employment Location Quotient	0.71	0.73	3.2%	-0.1%	6

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

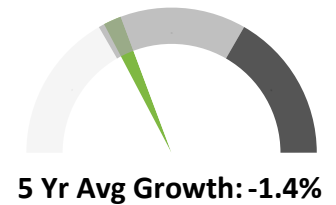
Mitchell Employment



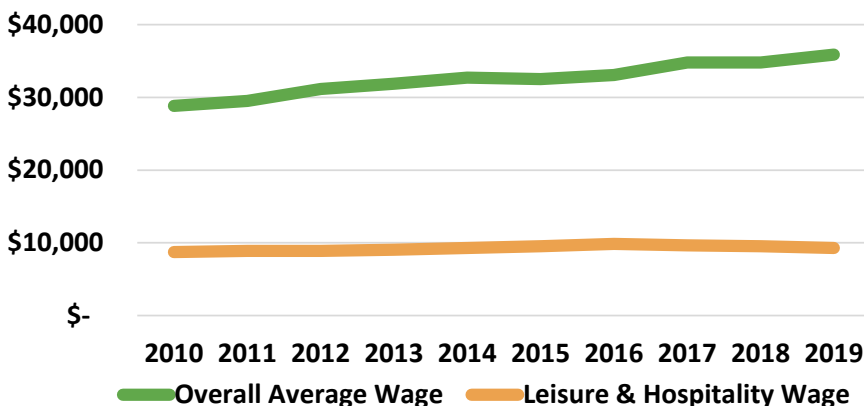
Total Population



Leisure Employment



Mitchell Average Wages



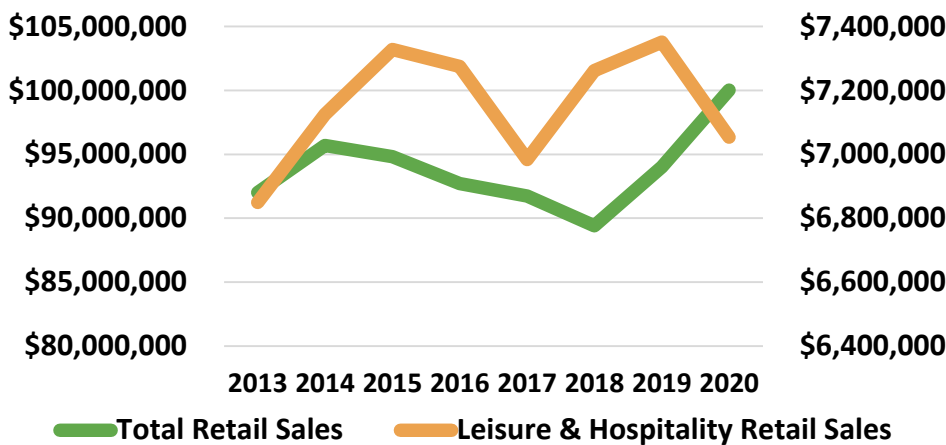
Average Leisure Wages



MITCHELL COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$94,004,364	\$100,007,920	6.4%	1.1%	9
Leisure & Hospitality Retail Sales	\$7,351,217	\$7,053,374	-4.1%	-0.8%	19
Per Capita Retail Sales	\$15,285.26	\$16,726.53	9.4%	2.1%	11
Per Capita L&H Retail Sales	\$1,195.32	\$1,179.69	-1.3%	0.2%	18
County Pull Factor (All Sales)	0.99	1.05	5.8%	-0.4%	12
County Pull Factor (L&H Sales)	0.61	0.71	15.5%	0.7%	18

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

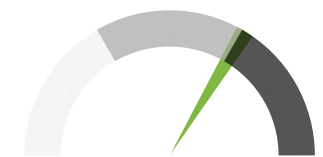
Mitchell Retail Sales



Source: CEDBR, KS Dept of Revenue

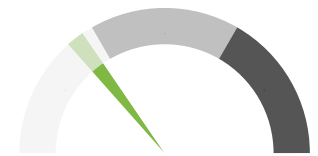
Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: 1.1%

Leisure Retail Sales



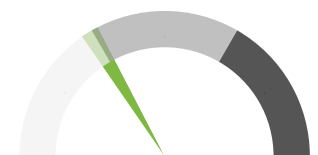
5 Yr Avg Growth: -0.8%

County Pull Factor (All)



5 Yr Avg Growth: -0.4%

County Pull Factor (L&H)

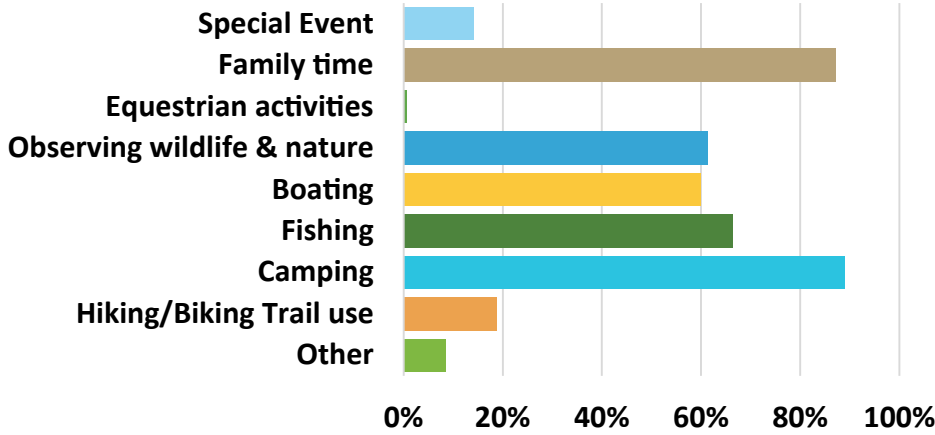


5 Yr Avg Growth: 0.7%

Glen Elder Park’s market area’s population declined by 4.9 percent from 2014 to 2019, a loss of approximately 300 residents. The area’s employment declined more sharply, contracting 9.3 percent, though leisure and hospitality employment only declined 6.6 percent. Despite these declines, the area’s retail sales have remained robust, with the third-highest overall retail pull factor of any Kansas state park market area. Per capita leisure and hospitality retail sales declined by only 1.3 percent in 2020, a much smaller drop than the state’s average decline of 14.6 percent.

Visitor Survey

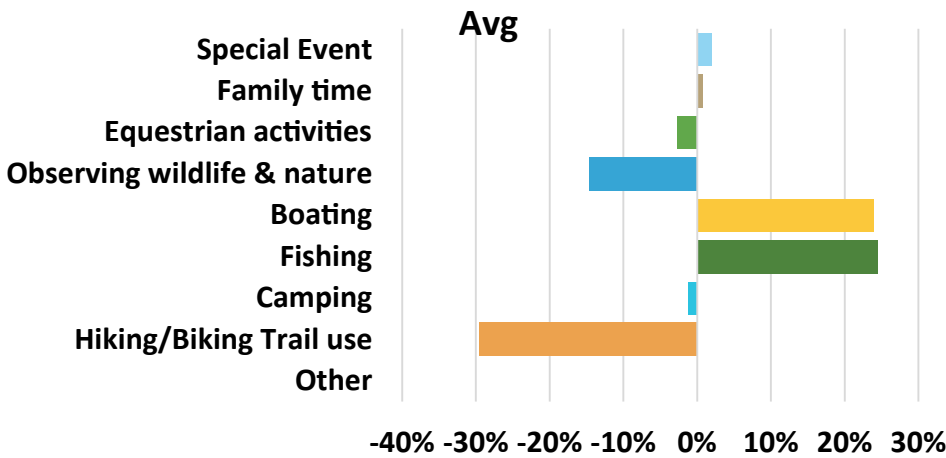
Park Visitor Activities



Survey respondents at Glen Elder State Park reported the highest levels of fishing and boating in the state, at 66.5 and 60 percent, respectively. These were both 24 percentage points or higher than the state average levels of usage.

Source: CEDBR

Park Visitor Activities Relative to State



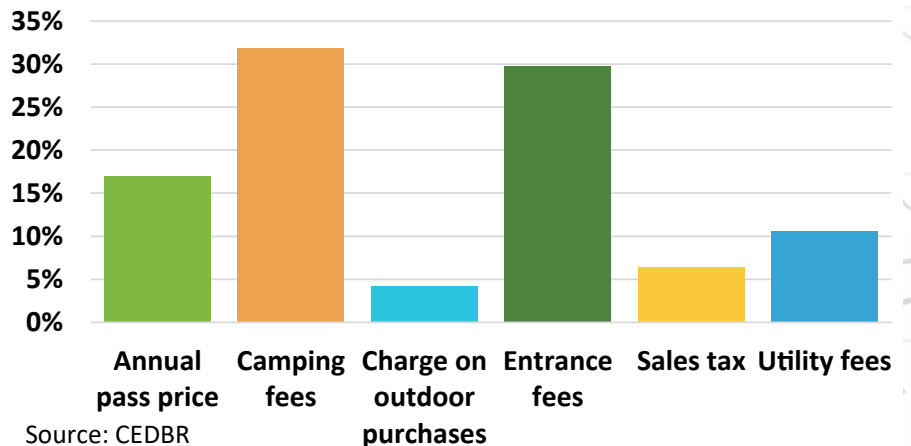
Conversely, hiking and cycling were engaged at a rate 29.6 percent lower than the state average, the lowest level in the state.

Source: CEDBR

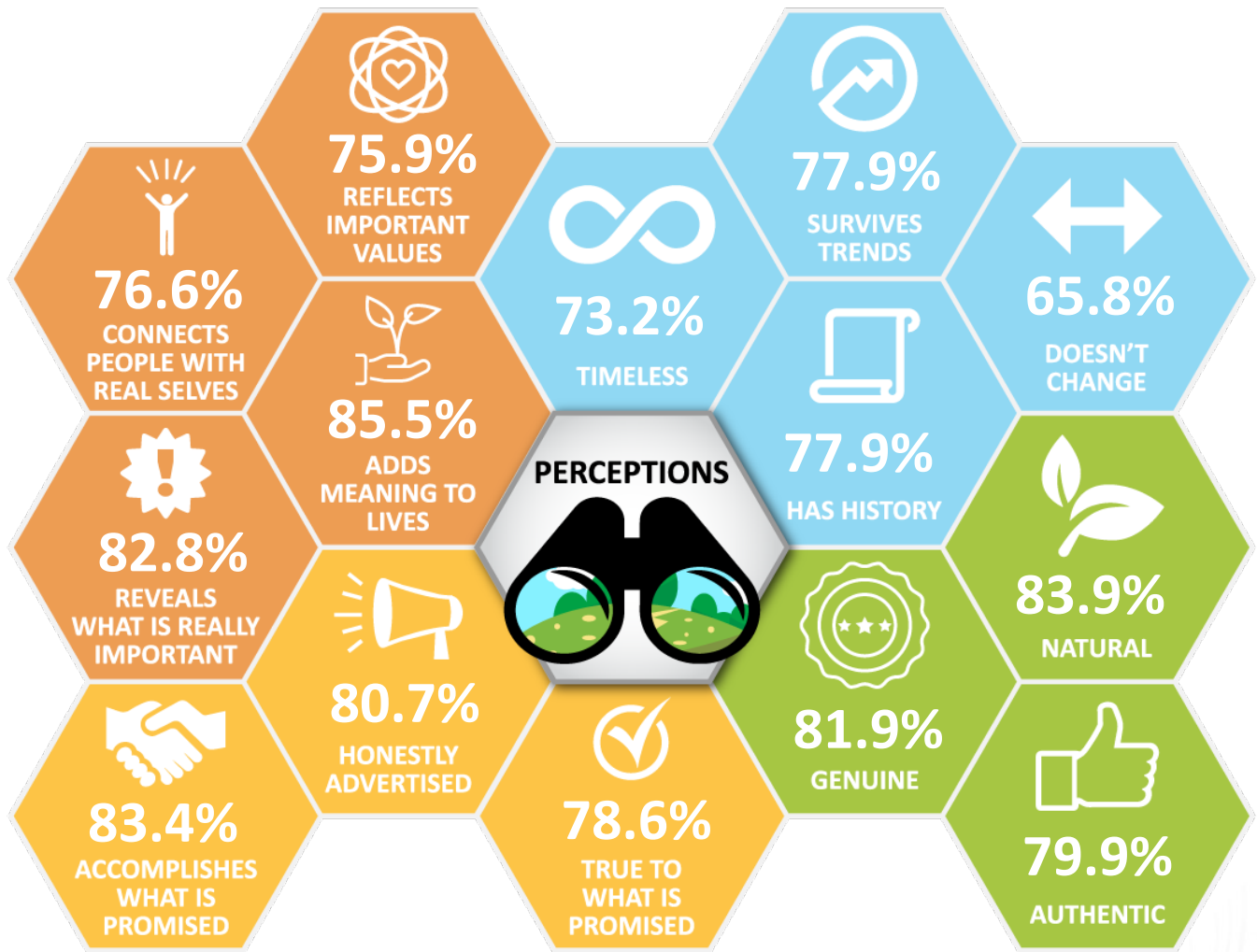
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



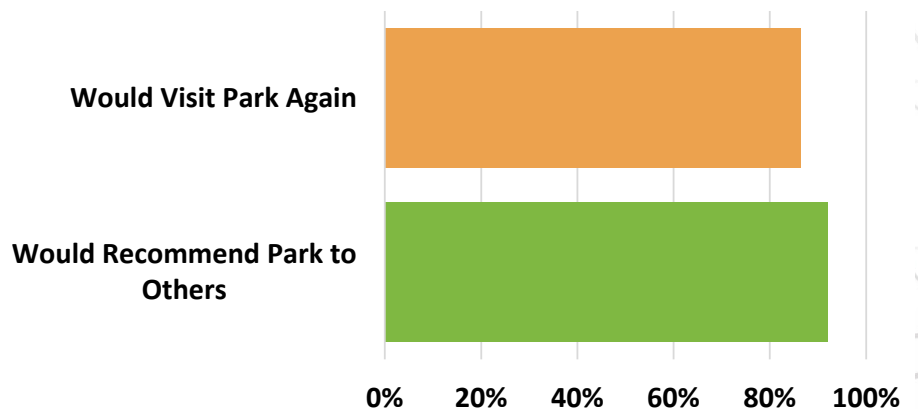
Source: CEDBR



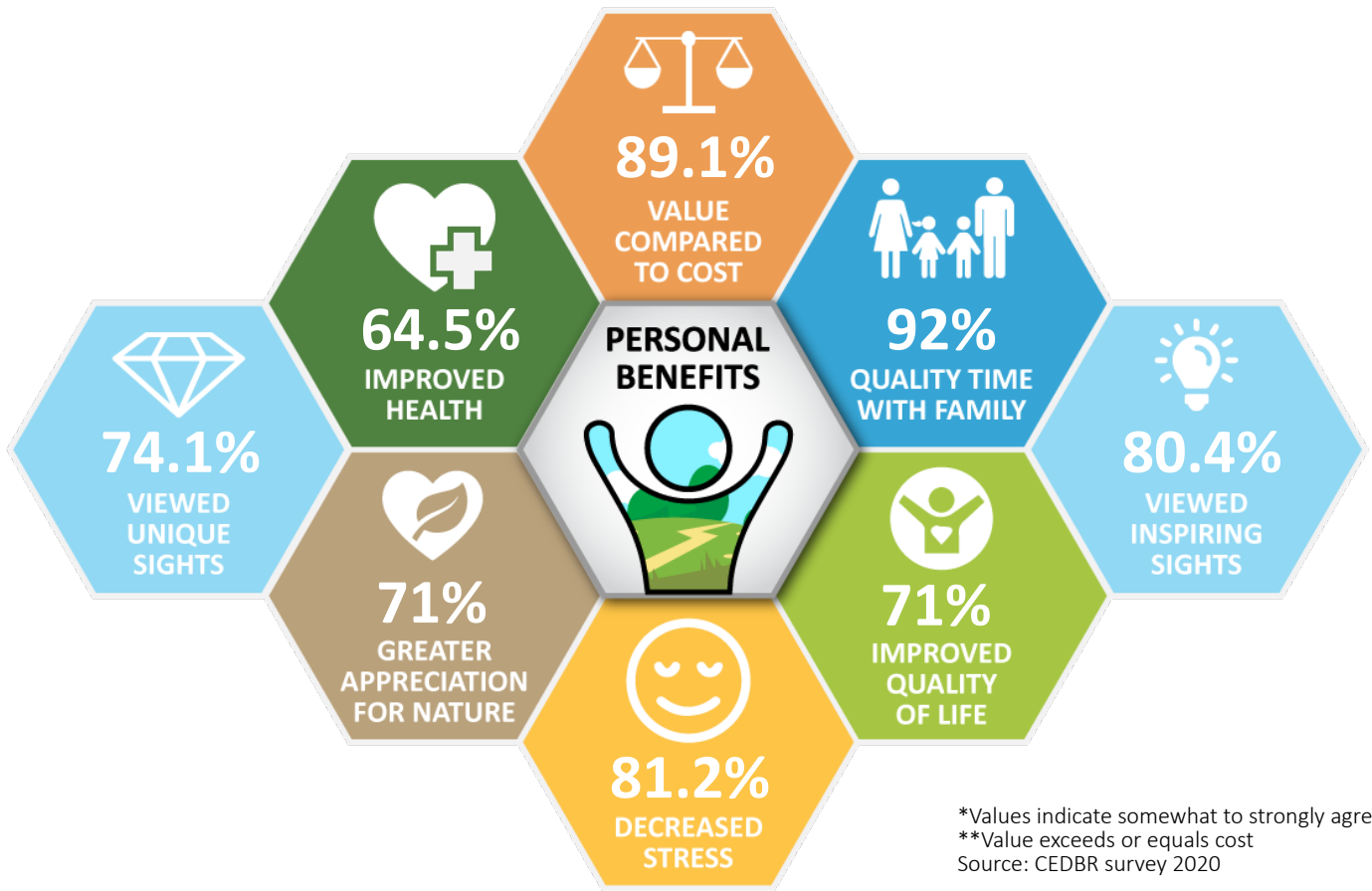
*Values indicate somewhat to strongly agree
 **N= 227
 Source: CEDBR survey 2020

Survey respondents who visited Glen Elder State Park were 6.6 percentage points more likely to revisit the park within 12 months than the average state park. Respondents also gave the park high marks for being genuine, natural, adding meaning to people’s lives, and a place to connect with what is really important. The park’s respondents had the lowest agreement with the perception that the park was a place that does not change, though still, 65.8 percent agreed.

Park Visitor Satisfaction



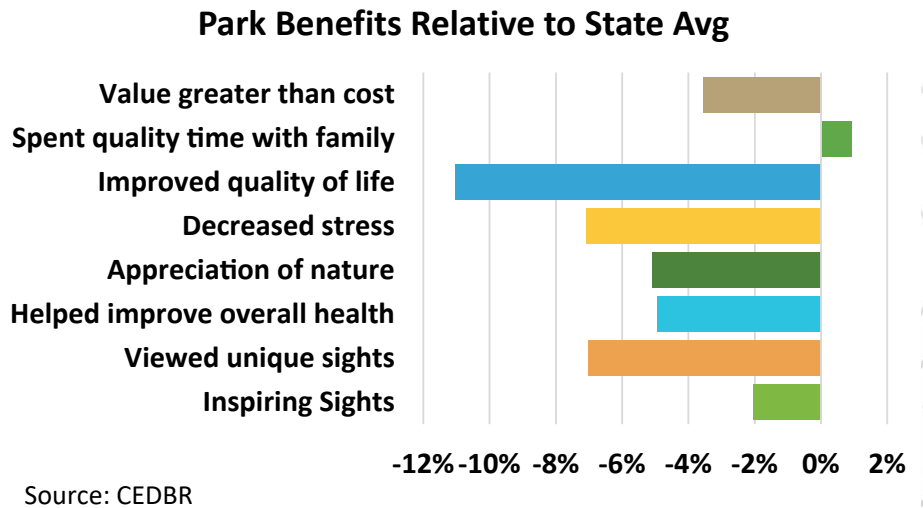
Source: CEDBR

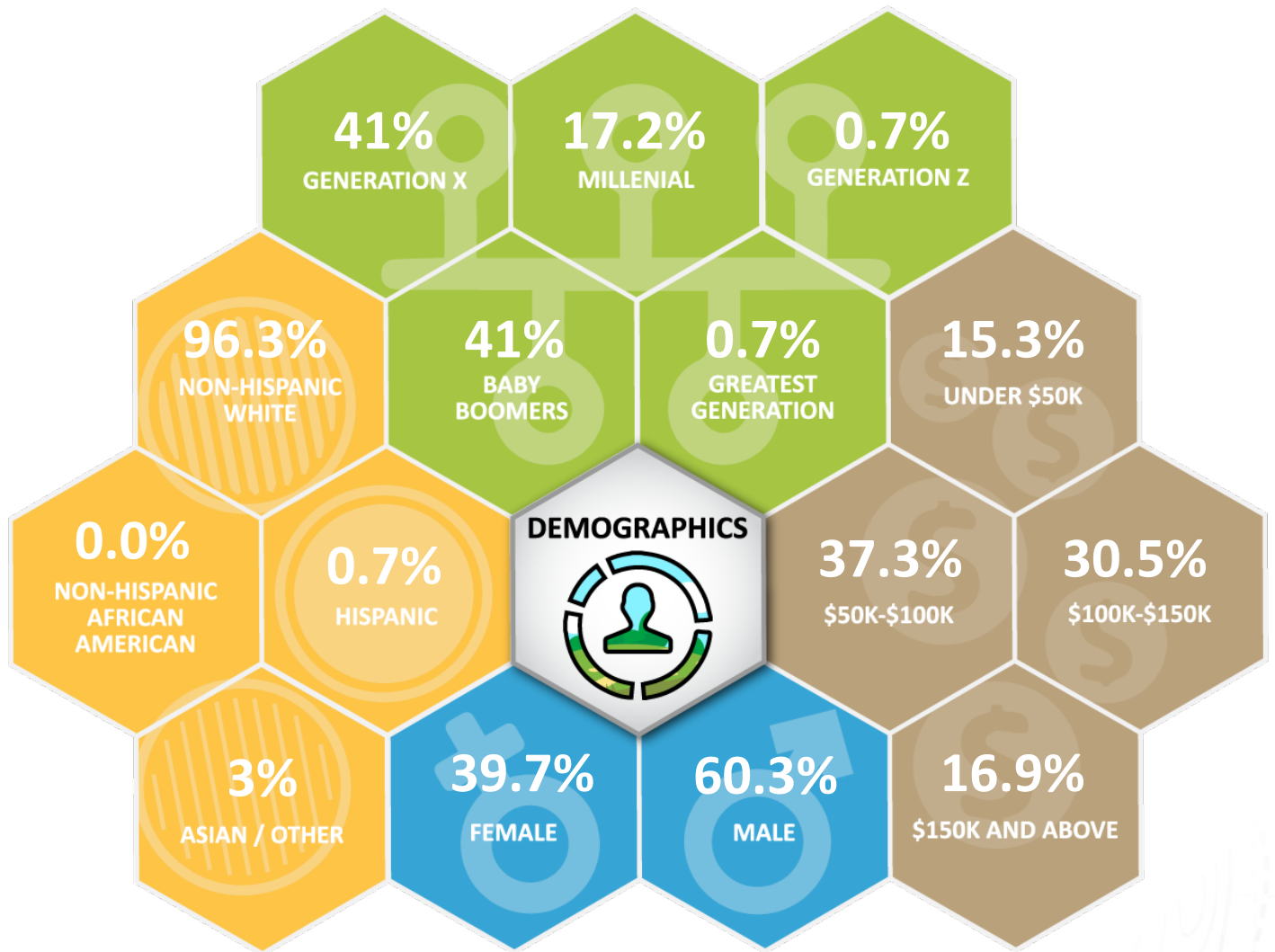


Almost nine in ten survey respondents who visited Glen Elder State Park valued their visit more than the cost they spent on the trip, a rate that was 3.6 percentage points lower than the state park system average. The one benefit of which the park outperformed the state average was spending quality time with family. The park’s visitors benefited at a rate of 0.9 percentage points higher than the average state park. Millennial-aged respondents reported the highest level of value relative to cost, while Baby Boomer-aged respondents reported receiving benefits at the highest rate at the park.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	87%	75%	74%
Viewed unique sights	75%	71%	83%
Helped Improve Overall Health	62%	71%	57%
Appreciation of nature	76%	67%	70%
Decreased stress	85%	84%	70%
Improved Quality time with Family	69%	73%	74%
Spent quality time with family	95%	91%	96%
Value greater than cost	87%	91%	91%

Source: CEDBR

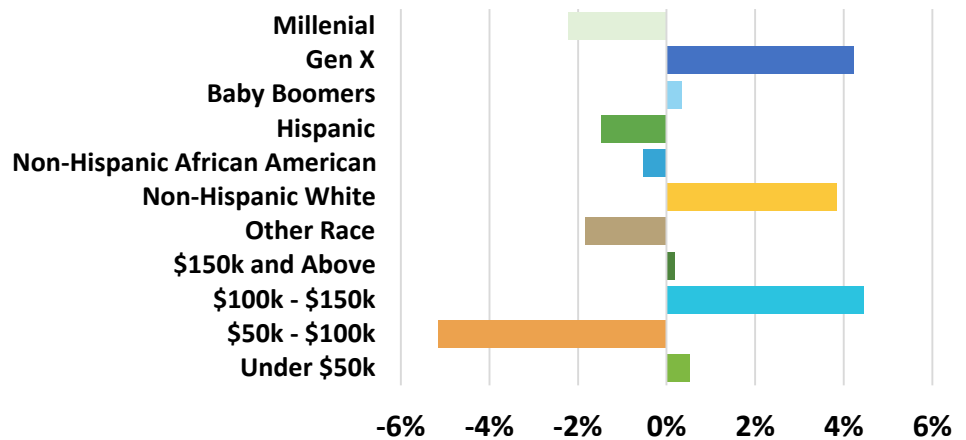




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Glen Elder State Park tended to have relatively high incomes, with 47.5 percent earning \$100,000 or more. Respondents were also somewhat older than average, with the share in the Baby Boomer generation 0.3 percentage points above average and those in Generation X 4.2 percentage points above average. The share of people of color among the respondents was 3.7 percent, the second-lowest of any Kansas state park.

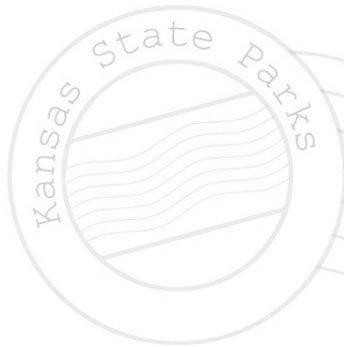
Park Visitor Demographics Relative to State Avg



Source: CEDBR

HILLSDALE STATE PARK | MIAMI COUNTY

Economic Impact



*Visitor Days









Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$281,092	\$11,106,420	\$1,728,324	\$13,115,840
EMPLOYMENT	6	439	41	487
OUTPUT	\$313,006	\$22,854,502	\$6,201,225	\$29,368,728

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$5,328	-	\$27,046
Mining		\$14,586	0	\$175,414
Construction		\$73,792	1	\$242,128
Manufacturing		\$72,119	1	\$760,463
TIPU		\$778,113	15	\$4,382,423
Trade		\$7,708,466	338	\$9,298,881
Service		\$4,296,500	128	\$14,162,562
Government		\$166,937	2	\$319,812
Total		\$13,115,840	487	\$29,368,728

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$2,380,737	\$2,325,922	\$288,333	\$303,892	\$30,517
2020	\$3,265,583	\$3,190,296	\$395,489	\$416,060	\$41,714

Source: CEDBR

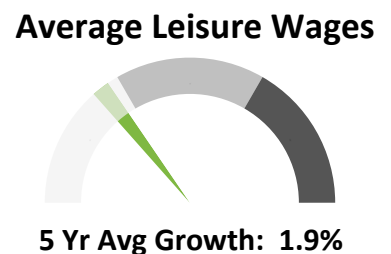
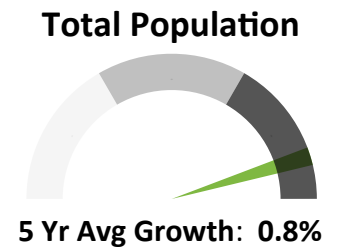
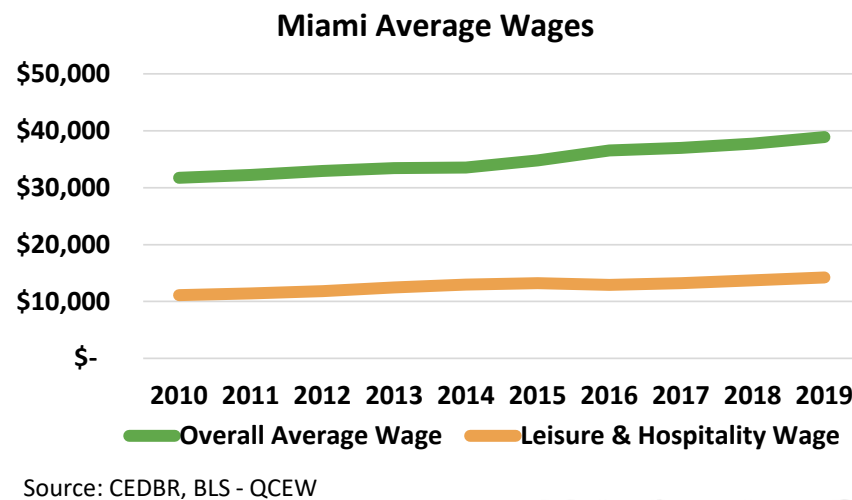
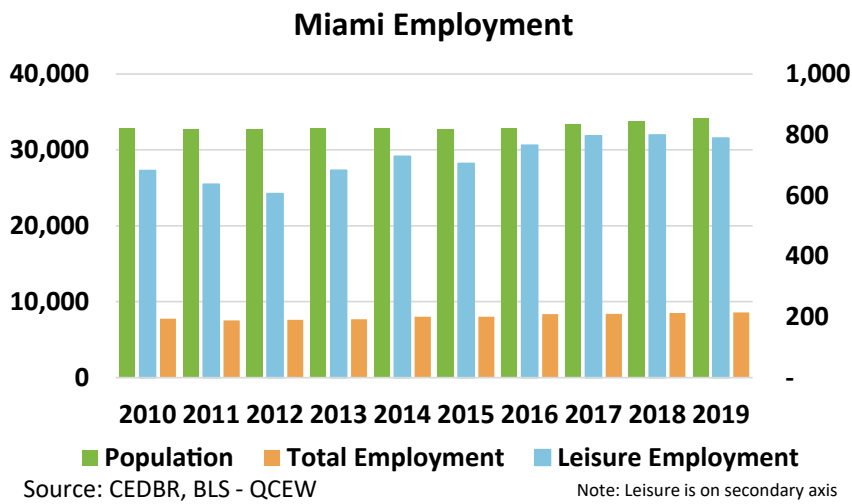
PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$8,570,438	\$4,545,403	\$11,511,705	\$6,229,239
Employment	365	122	495	168
Output	\$18,094,433	\$11,274,295	\$24,541,883	\$15,441,922

Source: CEDBR

Market Data

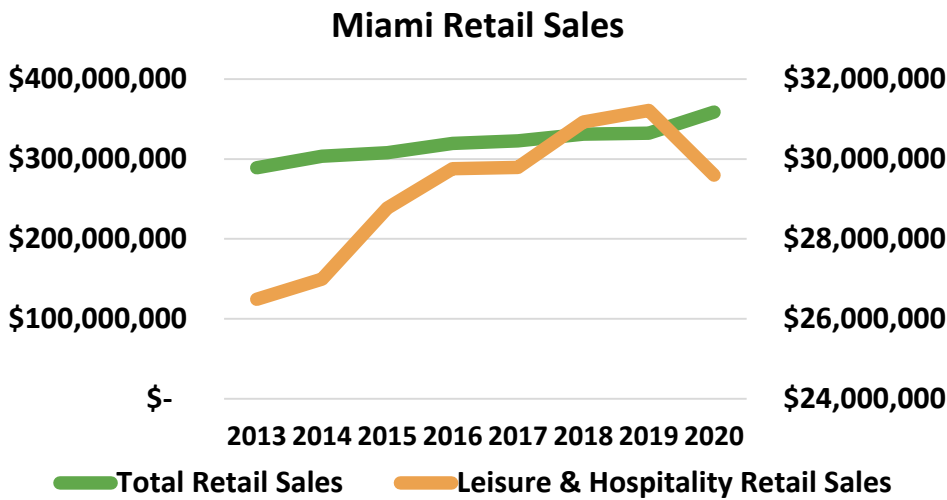
MIAMI COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	33,680	34,237	1.7%	0.8%	3
Total Employment	8,499	8,584	1.0%	1.4%	1
Leisure & Hospitality Employment	799	789	-1.3%	1.6%	5
Leisure & Hospitality Share	9.4%	9.2%	-0.2%	0.2%	16
Average Annual Wage (All Industries)	\$37,729	\$38,883	3.1%	3.0%	4
Average Annual Wage (Leisure & Hosp)	\$13,699	\$14,216	3.8%	1.9%	19
L&H Employment Location Quotient	1.01	0.98	-2.1%	-0.4%	13

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



MIAMI COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$332,183,562	\$358,735,053	8.0%	3.1%	4
Leisure & Hospitality Retail Sales	\$31,218,148	\$29,594,718	-5.2%	0.6%	15
Per Capita Retail Sales	\$9,862.93	\$10,477.99	6.2%	2.2%	8
Per Capita L&H Retail Sales	\$926.90	\$864.41	-6.7%	-0.3%	21
County Pull Factor (All Sales)	0.67	0.65	-3.5%	-0.1%	9
County Pull Factor (L&H Sales)	0.47	0.52	9.2%	0.2%	21

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

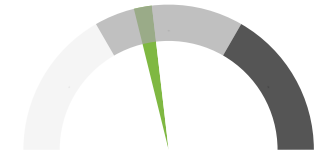
Note: Leisure is on secondary axis

Total Taxable Retail Sales



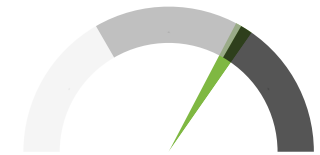
5 Yr Avg Growth: 3.1%

Leisure Retail Sales



5 Yr Avg Growth: 0.6%

County Pull Factor (All)



5 Yr Avg Growth: -0.1%

County Pull Factor (L&H)

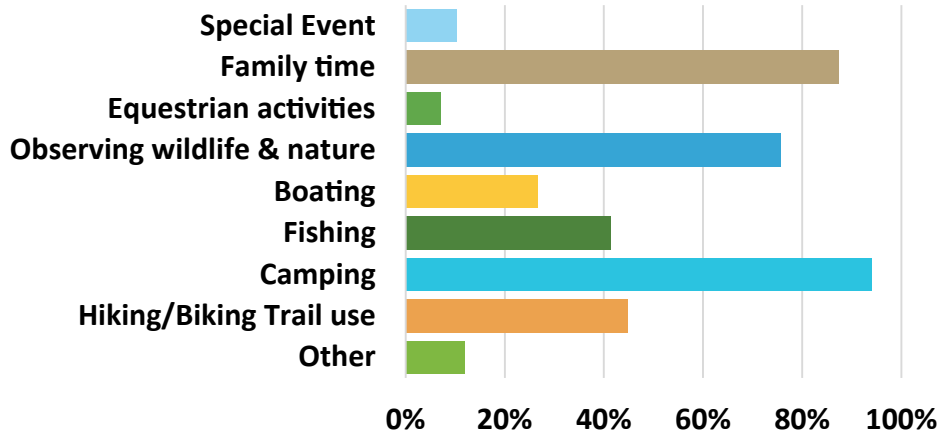


5 Yr Avg Growth: 0.2%

The Hillsdale Park market area experienced the fastest growth in overall employment of any Kansas state park market area from 2014 to 2019, expanding 7 percent. The area’s leisure and hospitality employment grew even more rapidly, at a rate of 8.2 percent. Wage growth was also robust in the region, with an average increase of 3 percent, outpacing the state average by 0.6 percent annually. The area’s leisure and hospitality retail sales lagged behind much of the state, with per capita leisure and hospitality sales at approximately half the state average level.

Visitor Survey

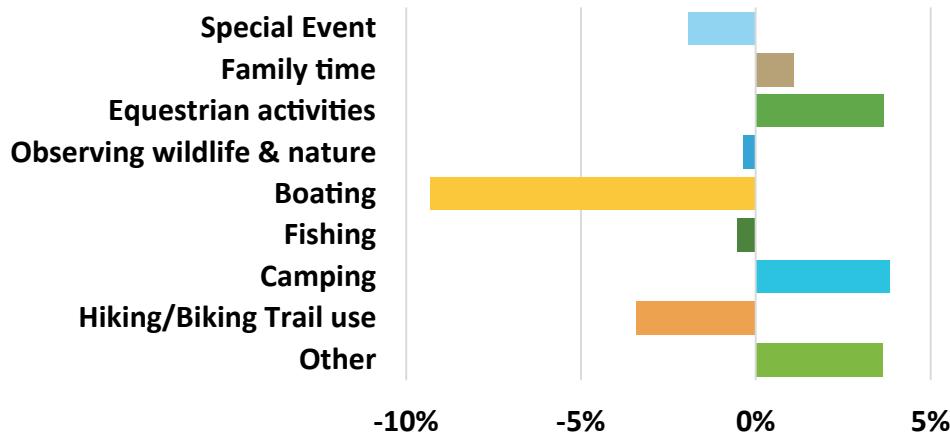
Park Visitor Activities



Family time and camping were the two most popular activities at Hillsdale State Park, with more than 85 percent of survey respondents participating in each. The park had one of the highest rates of equestrian activities, 7.1 percent, which was more than double the average across all state parks.

Source: CEDBR

Park Visitor Activities Relative to State Avg



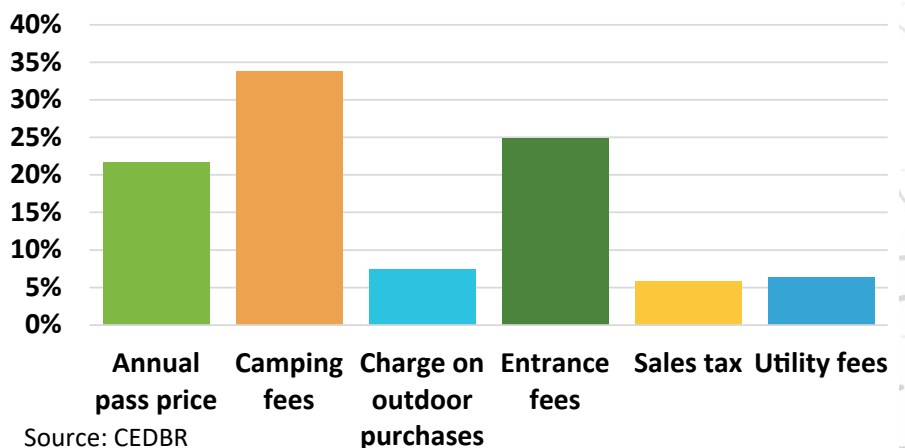
Three-fifths of respondents supported increased fees to improve park services and one-third of those supported raising fees on camping.

Source: CEDBR

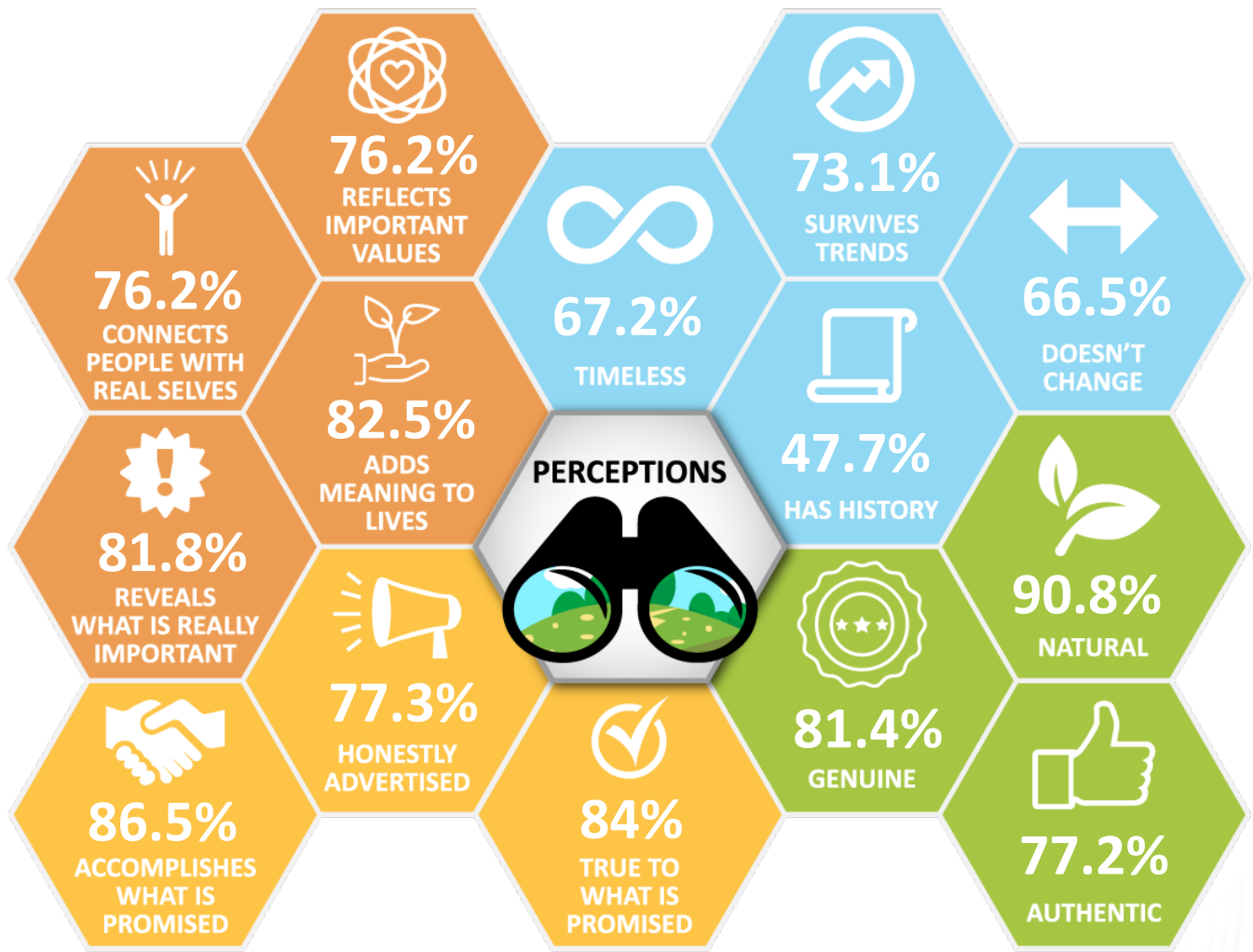
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



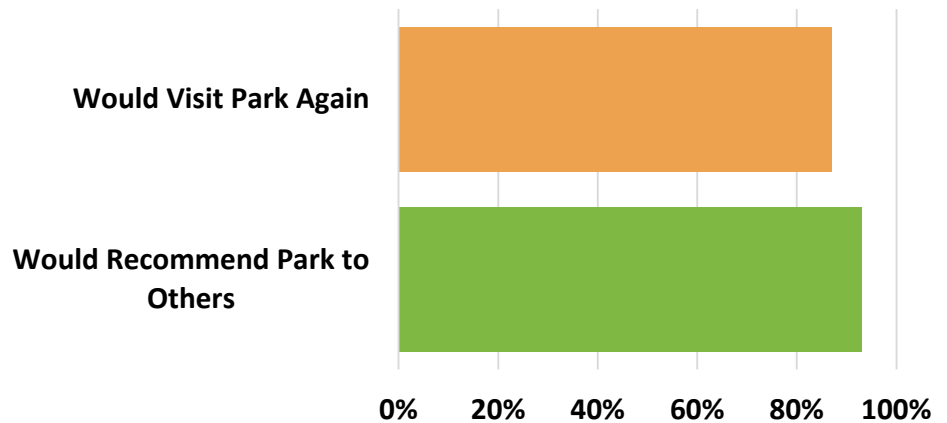
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 675
 Source: CEDBR survey 2020

Hillsdale State Park was recommended by 93.1 percent of survey respondents who visited the park, a rate 1.2 percentage points higher than the state average. The park was rated above the state park system average in perceptions of being natural, a place that is true to what it promises, and a place that accomplishes what it promises to visitors. Respondents gave the park one of the lowest marks among all state parks for being perceived as a place with history, with only 47.7 percent agreeing.

Park Visitor Satisfaction



Source: CEDBR



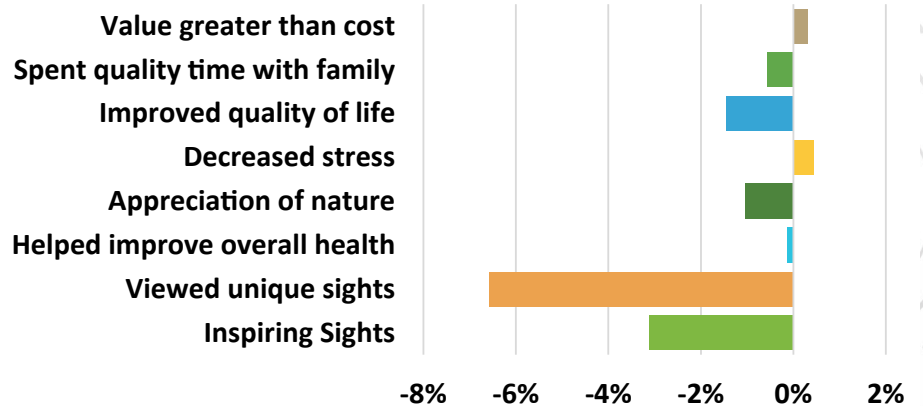
*Values indicate somewhat to strongly agree
 **Value exceeds or equals cost
 Source: CEDBR survey 2020

Among survey respondents who visited Hillsdale State Park, the rate at which the respondents valued their trip at more than its cost was 0.3 percentage points greater than the rate for the overall park system. The only personal benefit on the survey for which the park outperformed the state average was that the park decreased stress at a rate 0.5 percentage points higher than average. The park had one of the lowest rates of visitors benefiting from unique sights in the park system, which was below average by more than 6.6 percentage points.

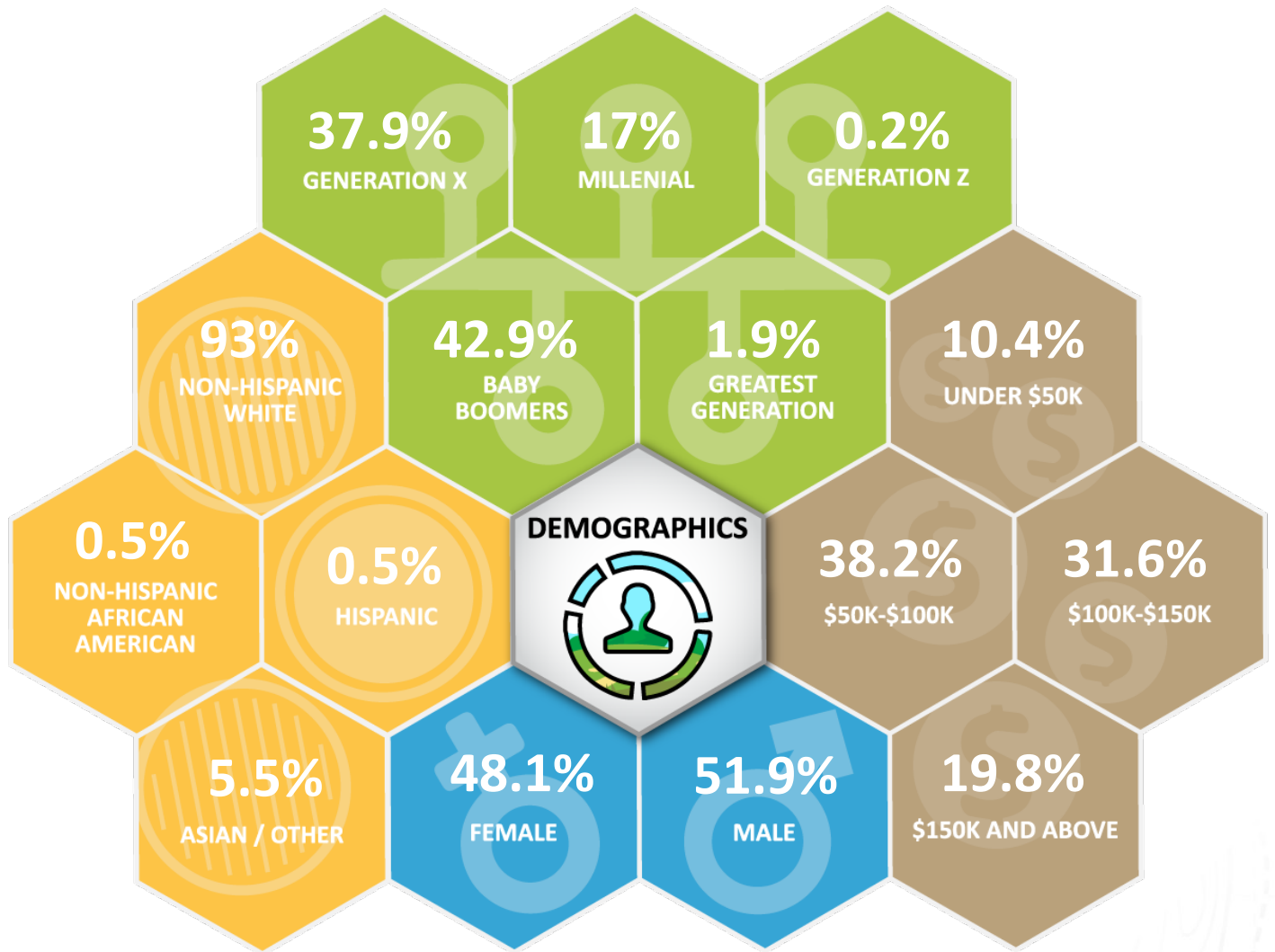
PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	78%	81%	79%
Viewed unique sights	71%	77%	80%
Helped Improve Overall Health	66%	73%	73%
Appreciation of nature	70%	81%	79%
Decreased stress	89%	92%	85%
Improved Quality time with Family	79%	86%	82%
Spent quality time with family	86%	95%	97%
Value greater than cost	95%	94%	89%

Source: CEDBR

Park Benefits Relative to State Avg



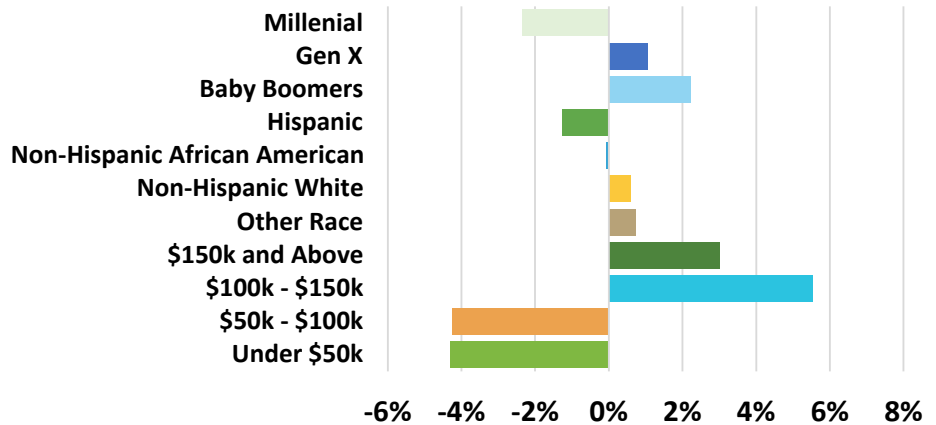
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Among survey respondents who visited Hillsdale State Park, 80.8 percent were in the Baby Boomer generation or Generation X, a share 3.5 percentage points greater than the overall state park system. Hillsdale’s respondents tended to be higher income than the average park, ranking third highest in both respondents with an income of \$100,000 to \$150,000 and respondents with an income greater than \$150,000. The share of people of color visiting the park was 0.5 percentage points higher than the state average.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

KANOPOLIS STATE PARK | ELLSWORTH COUNTY

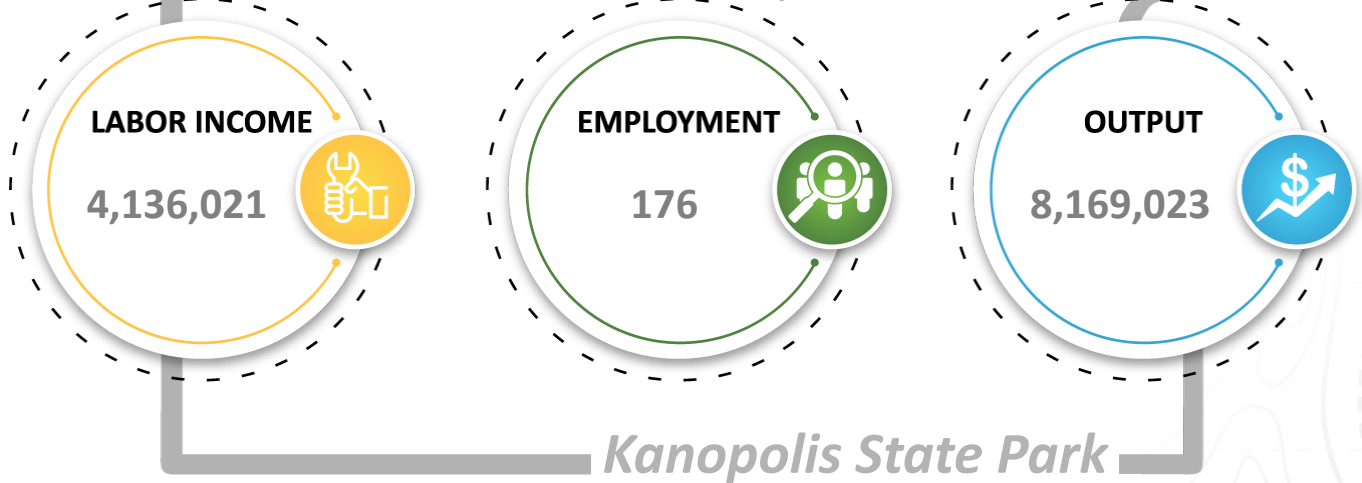
Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$195,717	\$3,512,464	\$427,845	\$4,136,021
EMPLOYMENT	5	160	11	176
OUTPUT	\$155,545	\$6,339,015	\$1,674,470	\$8,169,023

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$1,833	-	\$11,926
Mining		\$2,569	-	\$35,140
Construction		\$11,584	-	\$43,529
Manufacturing		\$12,679	0	\$130,871
TIPU		\$183,840	3	\$747,026
Trade		\$2,519,886	127	\$3,204,337
Service		\$1,373,597	45	\$3,925,637
Government		\$30,033	0	\$70,558
Total		\$4,136,021	176	\$8,169,023

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$731,958	\$999,602	\$61,150	\$85,466	\$9,992
2020	\$1,204,029	\$1,643,900	\$100,593	\$140,044	\$16,248

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,815,449	\$1,320,576	\$4,397,571	\$2,170,140
Employment	138	1,021,381	219	64
Output	\$5,113,311	\$3,055,715	\$8,139,968	\$5,014,706

Source: CEDBR

Market Data

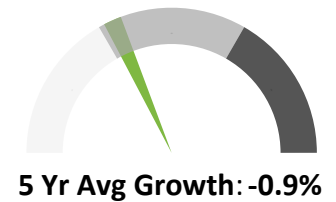
ELLSWORTH COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	5,283	5,257	-0.5%	-0.9%	17
Total Employment	2,265	2,337	3.2%	-4.7%	26
Leisure & Hospitality Employment	161	161	0.0%	4.7%	3
Leisure & Hospitality Share	7.1%	6.9%	-0.2%	9.9%	1
Average Annual Wage (All Industries)	\$36,104	\$37,579	4.1%	0.9%	24
Average Annual Wage (Leisure & Hosp)	\$10,390	\$10,693	2.9%	3.1%	9
L&H Employment Location Quotient	0.76	0.74	-2.9%	9.2%	1

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Ellsworth Employment



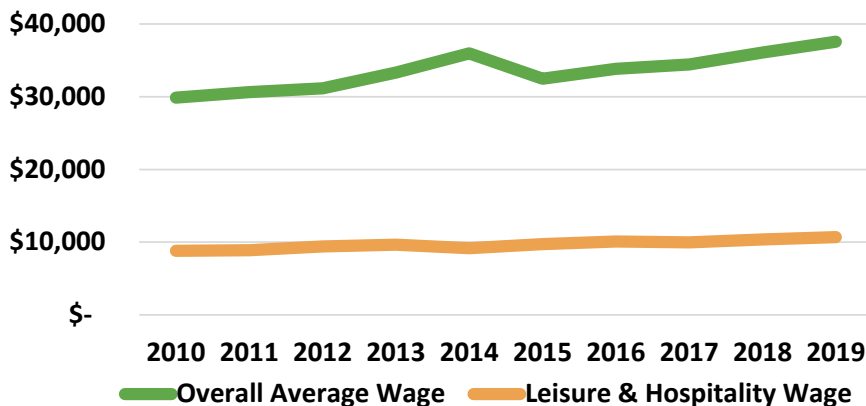
Total Population



Leisure Employment



Ellsworth Average Wages



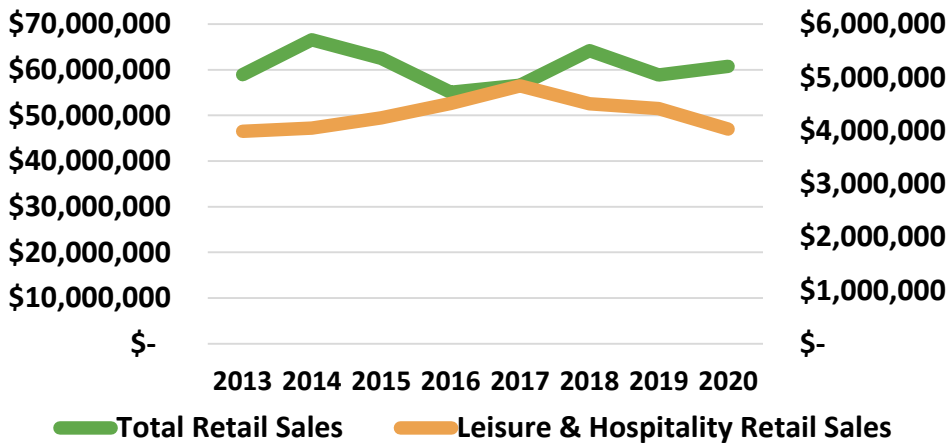
Average Leisure Wages



ELLSWORTH COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$58,832,496	\$60,734,239	3.2%	-0.6%	22
Leisure & Hospitality Retail Sales	\$4,412,929	\$4,030,010	-8.7%	-1.0%	22
Per Capita Retail Sales	\$11,136.19	\$11,553.02	3.7%	0.3%	18
Per Capita L&H Retail Sales	\$835.31	\$766.60	-8.2%	-0.1%	19
County Pull Factor (All Sales)	0.83	0.74	-9.9%	-2.6%	21
County Pull Factor (L&H Sales)	0.43	0.46	7.4%	0.4%	19

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Ellsworth Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: -0.6%



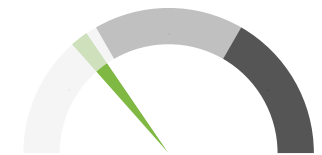
5 Yr Avg Growth: -1.0%

County Pull Factor (All)



5 Yr Avg Growth: -2.6%

County Pull Factor (L&H)

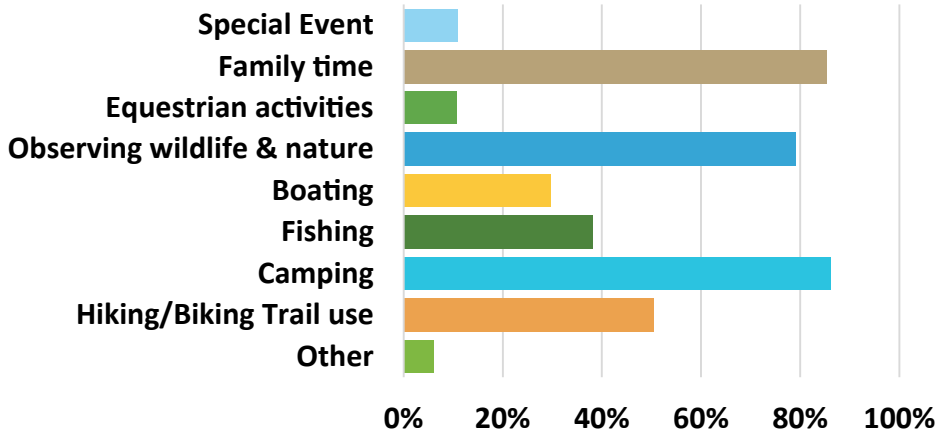


5 Yr Avg Growth: 0.4%

Kanopolis Park had the fastest growth in leisure and hospitality workers as a share of its market area’s workforce in the past five years, as compared to other Kansas state park market areas. Even with that growth, the area’s hospitality employment location quotient was only 0.74 in 2019, showing that the area’s hospitality employment share was 26 percent lower than the state average. The leisure and hospitality pull factor for the area was 0.46, a sign the area’s hospitality retail sales were less than half the state average on a per resident basis.

Visitor Survey

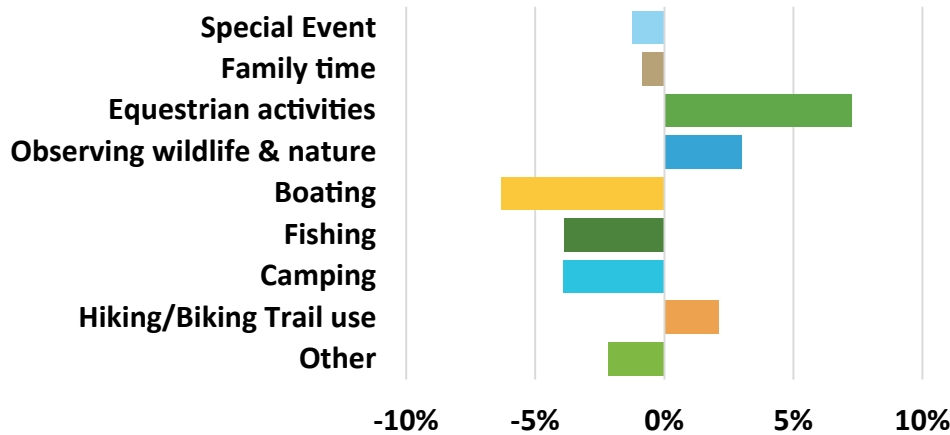
Park Visitor Activities



Kanopolis State Park had the second-highest rate of equestrian activities in the state, which at 10.6 percent was more than triple the statewide park average. The park had one of the lowest camping rates among survey respondents statewide, with only 86.3 percent engaging in camping activities on their last park visit.

Source: CEDBR

Park Visitor Activities Relative to State Avg



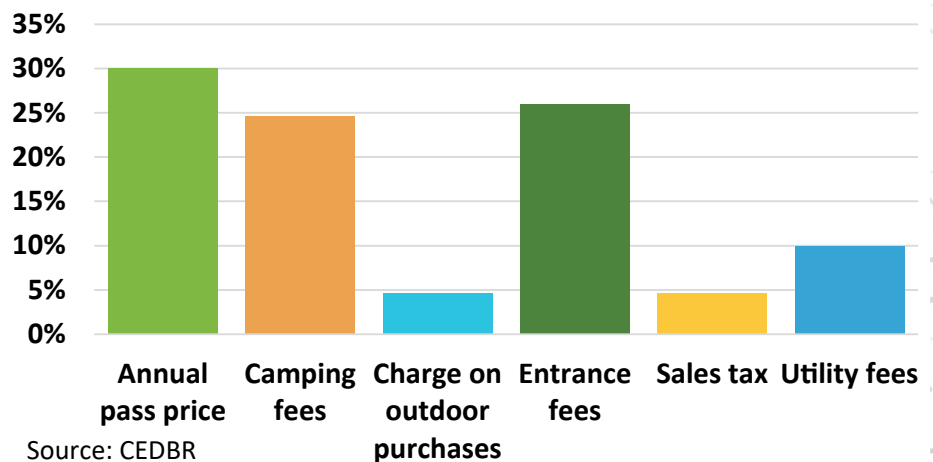
Respondents supported increased fees to improve park services at a rate similar to the statewide park average and had the highest support for increasing annual park pass fees to fund those improvements at 30 percent.

Source: CEDBR

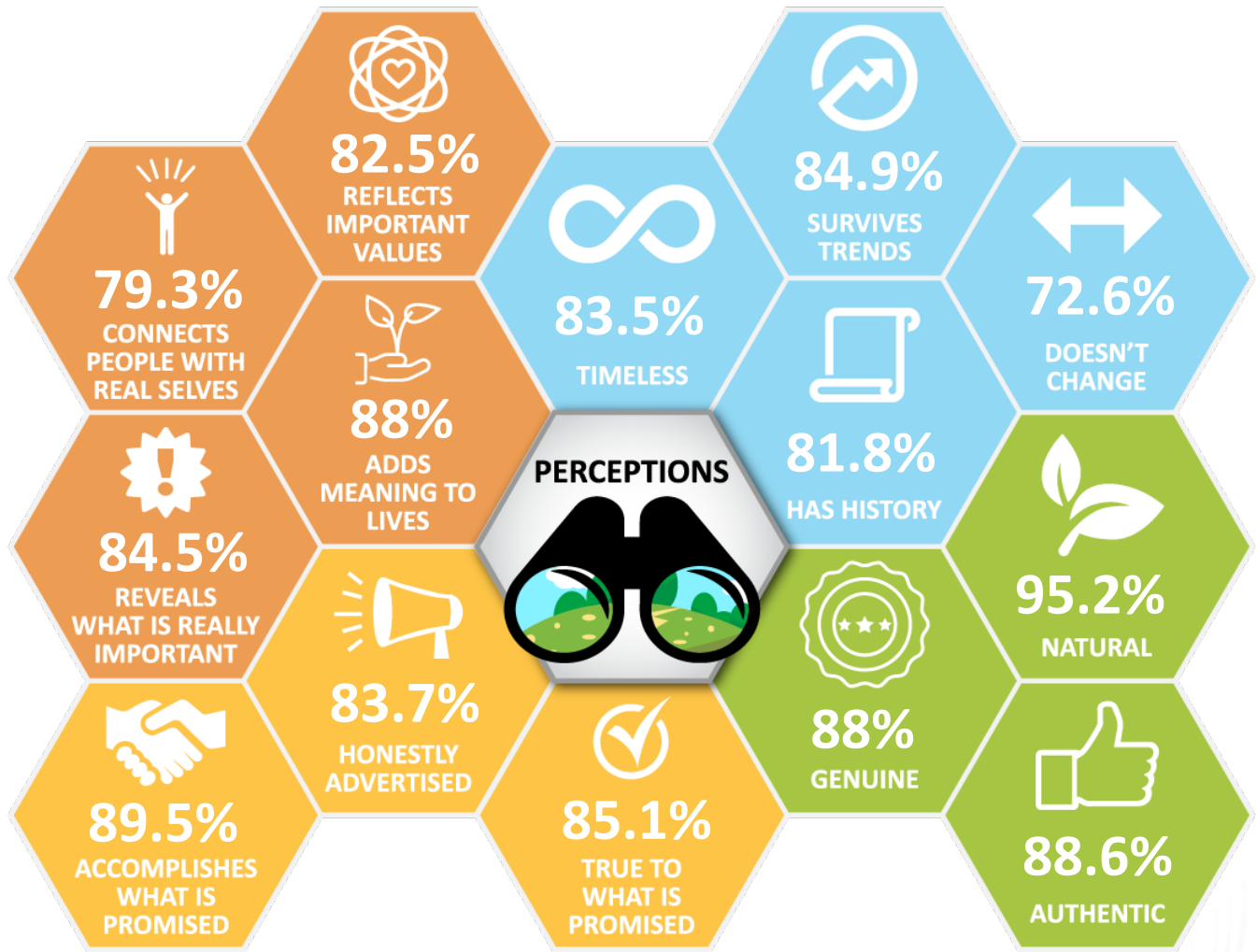
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



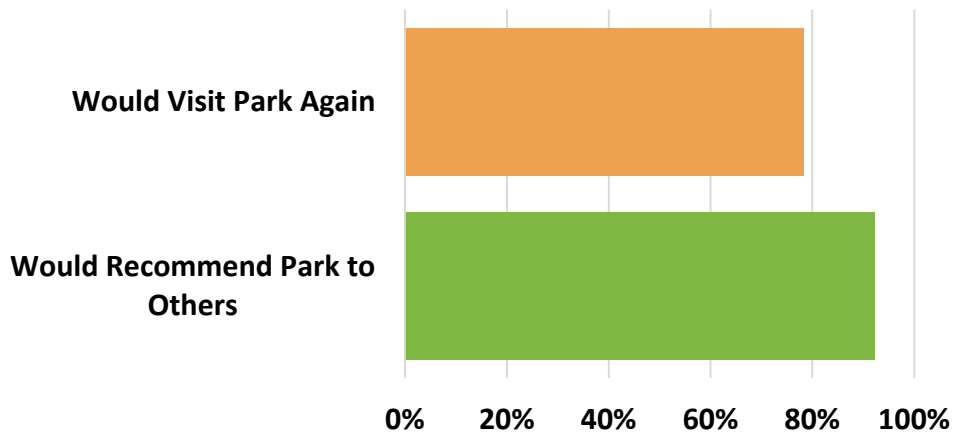
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 476
 Source: CEDBR survey 2020

Survey respondents who visited Kanopolis State Park had very positive perceptions of the park, giving the park above-average marks in every one of the 14 perception categories. On average, the park was rated 4.6 percentage points higher than the overall state park system in those categories, with the largest difference in the perception of the park being a timeless place, which was 8.3 percentage points higher than average.

Park Visitor Satisfaction



Source: CEDBR

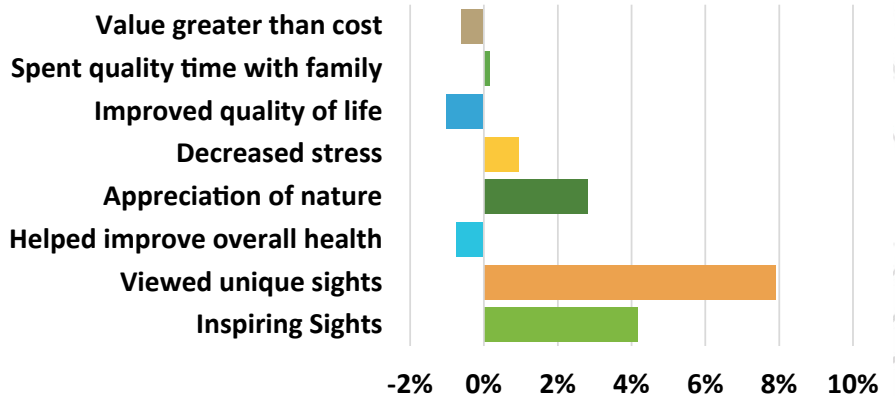


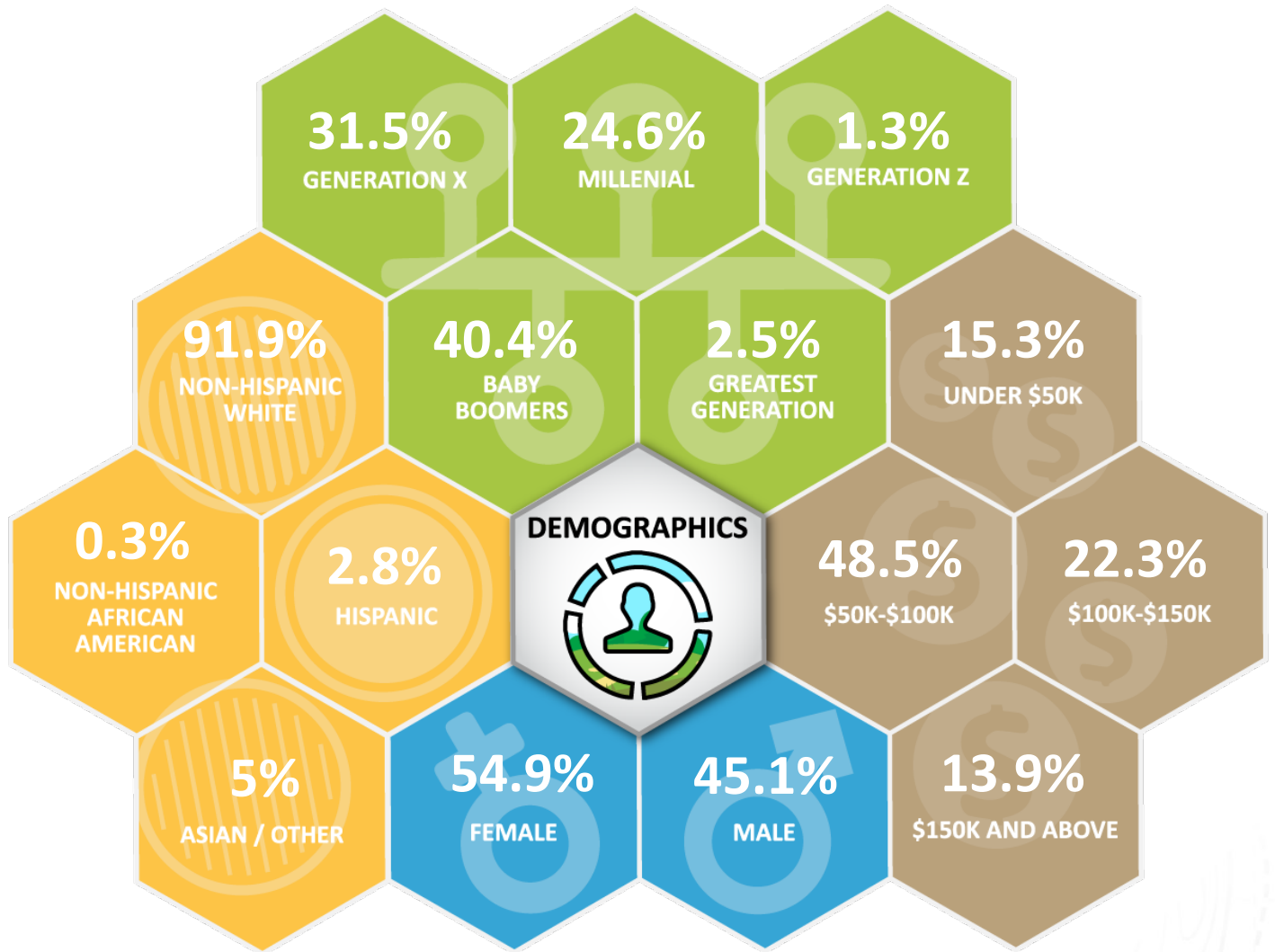
Survey respondents who visited Kanopolis State Park found the value of their trip exceeded the cost at a rate of 92.1 percent to only 7.9 percent who believed the cost of the trip to exceed its value. The park was in the top five parks statewide for both providing inspiring sights and unique sights to visitors, at rates 4.2 and 7.9 percentage points than the average state park in Kansas. The park received its highest marks from respondents in Generation X, who rated the park above their average for the park system in five of the seven benefit categories.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	87%	84%	90%
Viewed unique sights	86%	89%	94%
Helped Improve Overall Health	65%	72%	72%
Appreciation of nature	76%	80%	82%
Decreased stress	88%	93%	87%
Improved Quality time with Family	80%	83%	81%
Spent quality time with family	89%	95%	91%
Value greater than cost	92%	93%	90%

Source: CEDBR

Park Benefits Relative to State Avg

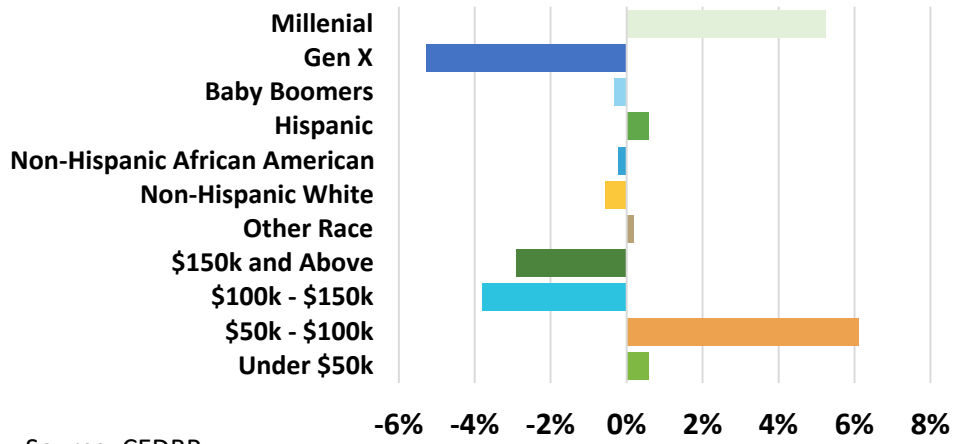




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Almost 8 percent of survey respondents who visited Kanopolis State Park identified as people of color, a rate 0.6 percentage points higher than that of the overall state park system. The park's respondents tended to be younger than average, with the third-highest share of Millennials of any Kansas state park. Visitors to the park tended to be lower income than the average state park, with a higher share of those earning under \$100,000 and a lower share of those earning more than \$100,000 annually.

Park Visitor Demographics Relative to State Avg



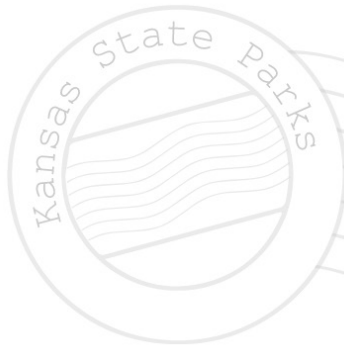
Source: CEDBR

KAW RIVER STATE PARK | SHAWNEE COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT 	INDIRECT 	INDUCED 	TOTAL
LABOR	\$14,250	\$540,448	\$120,636	\$675,334
EMPLOYMENT	0	18	2	21
OUTPUT	\$28,125	\$1,042,149	\$385,952	\$1,456,235

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$236	-	\$1,150
Mining		\$694	-	\$8,177
Construction		\$2,801	-	\$9,672
Manufacturing		\$2,853	-	\$32,854
TIPU		\$37,986	0	\$207,435
Trade		\$374,559	14	\$432,026
Service		\$248,505	6	\$751,191
Government		\$7,699	-	\$13,730
Total		\$675,334	21	\$1,456,235

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$115,580	\$87,945	\$10,785	\$14,172	\$1,866
2020	\$317,127	\$241,318	\$29,589	\$38,081	\$4,947

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$525,780	\$149,555	\$1,351,404	\$411,558
Employment	16	5	44	13
Output	\$1,106,407	\$349,823	\$2,817,105	\$959,520

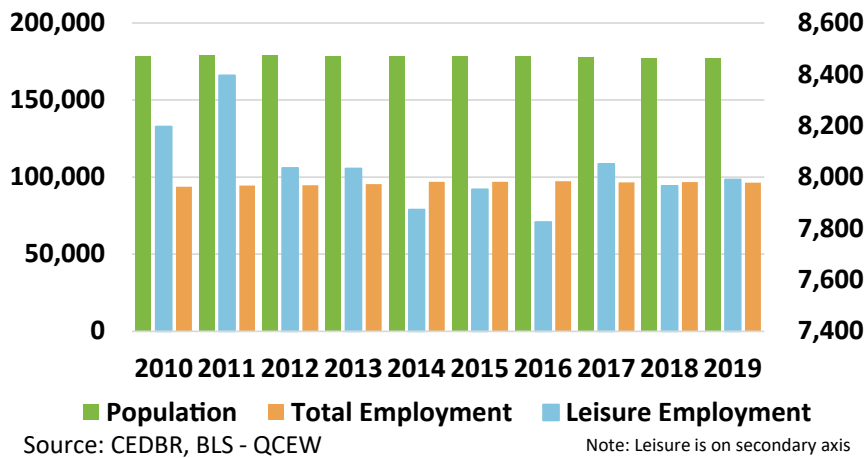
Source: CEDBR

Market Data

SHAWNEE COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	176,414	175,959	-0.3%	-0.2%	10
Total Employment	96,733	96,381	-0.4%	-0.1%	13
Leisure & Hospitality Employment	7,966	7,991	0.3%	0.3%	14
Leisure & Hospitality Share	8.2%	8.3%	0.1%	0.4%	11
Average Annual Wage (All Industries)	\$46,140	\$46,480	0.7%	2.2%	16
Average Annual Wage (Leisure & Hosp)	\$15,797	\$16,270	3.0%	2.6%	15
L&H Employment Location Quotient	0.88	0.89	0.8%	-0.2%	8

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

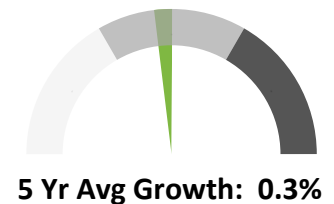
Shawnee Employment



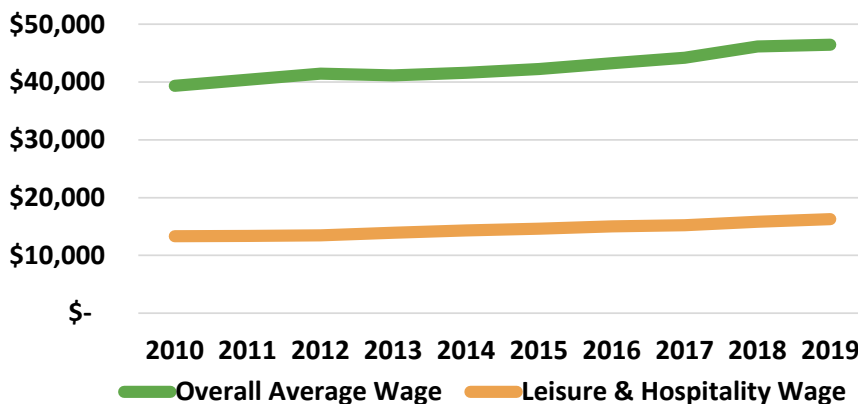
Total Population



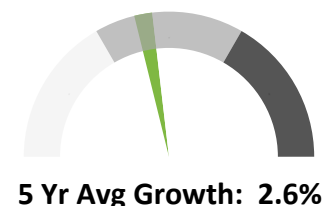
Leisure Employment



Shawnee Average Wages

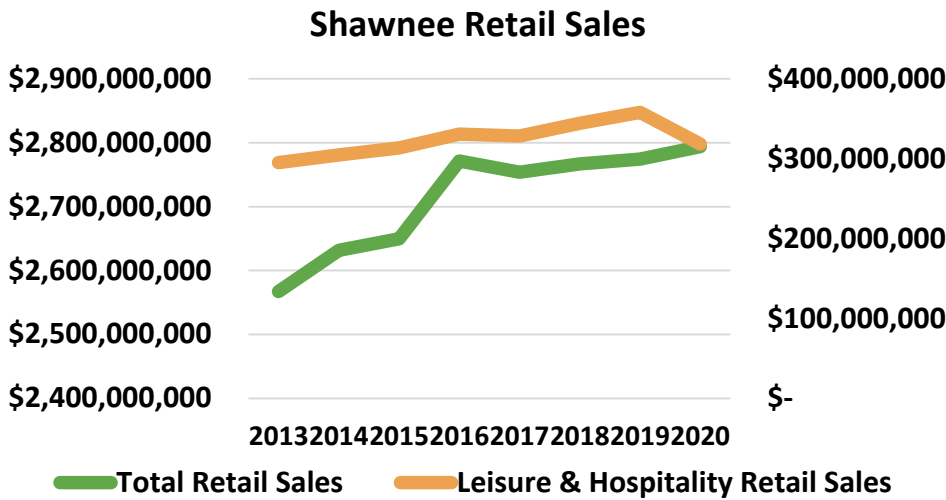


Average Leisure Wages



SHAWNEE COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$2,774,326,319	\$2,794,053,198	0.7%	1.1%	10
Leisure & Hospitality Retail Sales	\$358,147,923	\$318,299,277	-11.1%	0.3%	17
Per Capita Retail Sales	\$15,726.23	\$15,879.00	1.0%	1.3%	16
Per Capita L&H Retail Sales	\$2,030.16	\$1,808.94	-10.9%	0.5%	17
County Pull Factor (All Sales)	1.07	1.05	-1.7%	0.2%	8
County Pull Factor (L&H Sales)	1.04	1.08	4.3%	1.0%	17

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

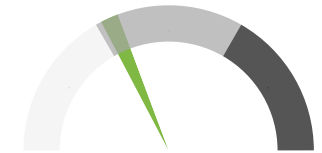
Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: 1.1%

Leisure Retail Sales



5 Yr Avg Growth: 0.3%

County Pull Factor (All)



5 Yr Avg Growth: 0.2%

County Pull Factor (L&H)



5 Yr Avg Growth: 1.0%

The market area for Kaw River was the largest in both population and employment, with more than 175,000 residents and 96,000 employed workers in 2019. The area also had the highest average wages of any Kansas state park market area, at \$46,480 in 2019, and the second-highest average annual leisure and hospitality wages. The area's retail pull factor of 1.04 in 2020 was a signal that the area had a higher than state average level of retail sales given its level of population, as retail spending per capita was \$15,879. Both the overall pull factor and the leisure and hospitality pull factor have increased in recent years, a sign that retail spending in the area was growing faster than the state average.

LAKE SCOTT STATE PARK | SCOTT COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$154,015	\$2,547,916	\$316,100	\$3,018,024
EMPLOYMENT	3	120	8	130
OUTPUT	\$69,422	\$5,268,038	\$1,141,696	\$6,479,153

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$2,612	-	\$12,145
Mining		\$3,381	0	\$42,274
Construction		\$7,752	-	\$34,557
Manufacturing		\$11,958	-	\$163,661
TIPU		\$165,120	3	\$990,298
Trade		\$1,731,545	95	\$2,349,016
Service		\$1,058,273	31	\$2,826,206
Government		\$37,382	0	\$60,997
Total		\$3,018,024	130	\$6,479,153

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$575,666	\$696,731	\$65,622	\$68,350	\$3,534
2020	\$773,702	\$936,326	\$88,194	\$91,750	\$4,747

Source: CEDBR

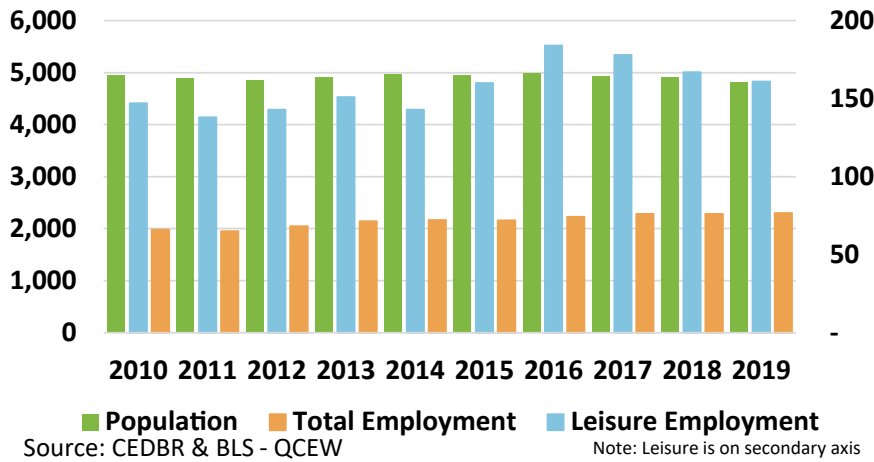
PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,049,771	\$968,253	\$2,667,928	\$1,301,755
Employment	102	29	135	39
Output	\$4,111,920	\$2,367,235	\$5,490,376	\$3,181,352

Source: CEDBR

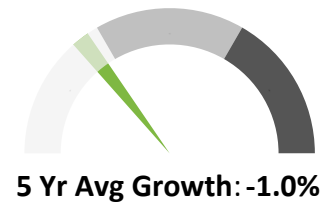
SCOTT COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	4,897	4,823	-1.5%	-1.0%	19
Total Employment	2,285	2,299	0.6%	1.2%	2
Leisure & Hospitality Employment	167	161	-3.6%	2.4%	4
Leisure & Hospitality Share	7.3%	7.0%	-0.3%	1.2%	7
Average Annual Wage (All Industries)	\$38,298	\$40,155	4.8%	2.1%	17
Average Annual Wage (Leisure & Hosp)	\$13,261	\$14,459	9.0%	3.9%	5
L&H Employment Location Quotient	0.78	0.75	-4.0%	0.0%	0

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Scott Employment



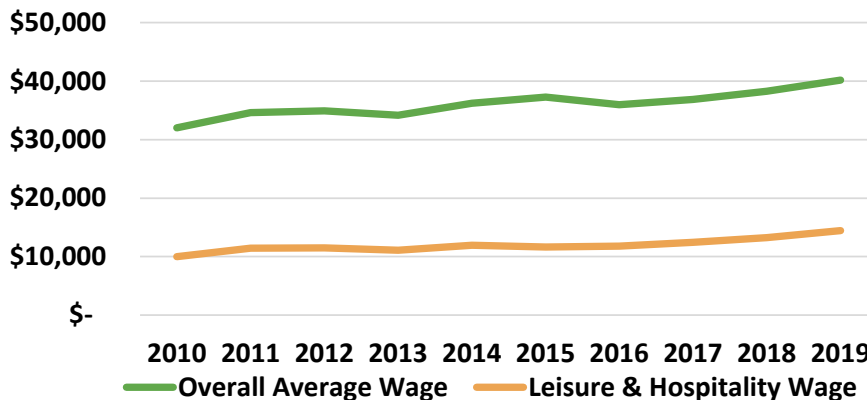
Total Population



Leisure Employment



Scott Average Wages



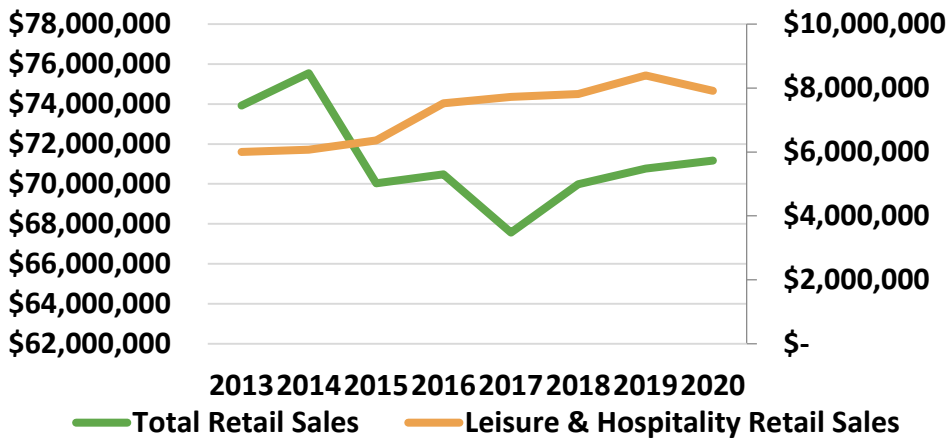
Average Leisure Wages



SCOTT COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$70,765,644	\$71,161,436	0.6%	0.3%	16
Leisure & Hospitality Retail Sales	\$8,394,747	\$7,912,110	-5.7%	4.5%	5
Per Capita Retail Sales	\$14,450.82	\$14,754.60	2.1%	1.4%	14
Per Capita L&H Retail Sales	\$1,714.26	\$1,640.50	-4.3%	5.6%	3
County Pull Factor (All Sales)	0.97	0.98	0.4%	-1.3%	14
County Pull Factor (L&H Sales)	0.88	0.98	12.0%	6.1%	3

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Scott Retail Sales



Source: CEDBR & KS Dept of Revenue

Note: Leisure is on secondary axis

Employment in Scott State Park’s market area grew the second fastest of any Kansas state park, increasing 6.2 percent from 2014 to 2019, even though the area’s population declined 5.1 percent. Leisure and hospitality employment grew even more rapidly, expanding 12.6 percent, with average annual wages in the sector increasing 21 percent, the fifth-fastest among state park market areas. The area had relatively high retail spending, with pull factors of 0.98 indicating that both overall retail spending and leisure and hospitality spending were in line with the state average.

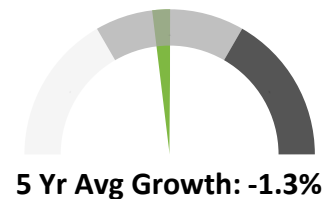
Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)

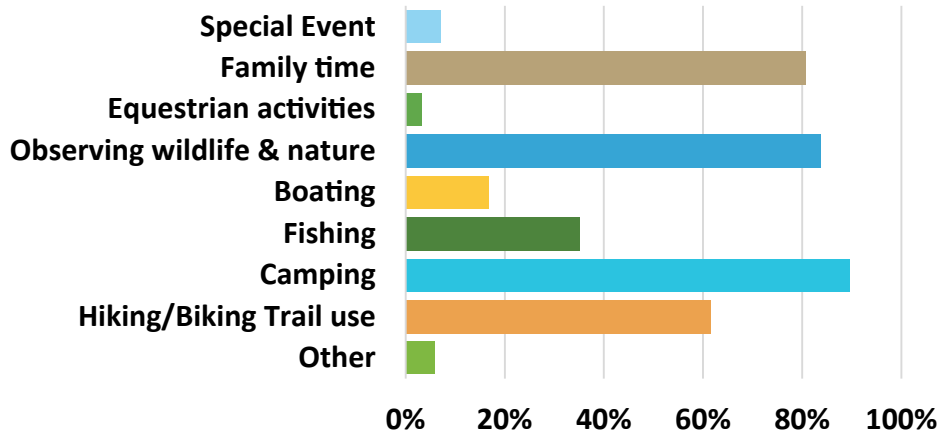


County Pull Factor (L&H)



Visitor Survey

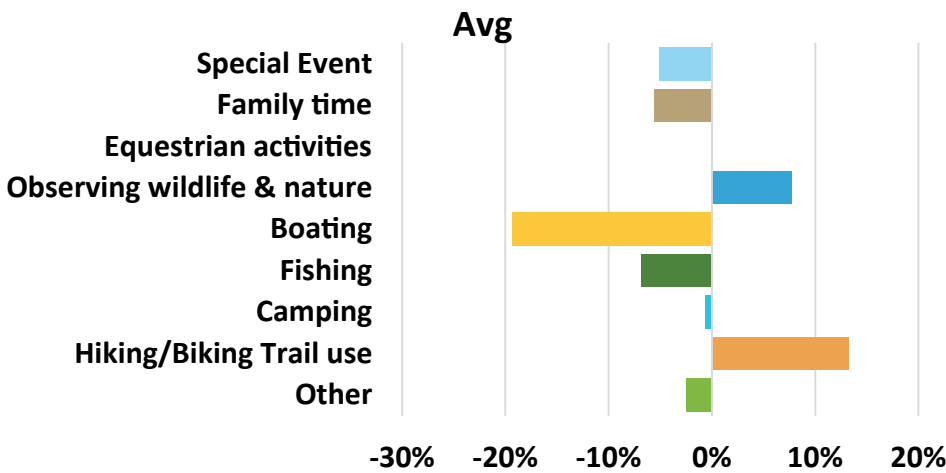
Park Visitor Activities



Camping and observing nature were the two most popular activities at Scott State Park. Survey respondents who visited the park engaging in observing nature at a rate of 7.7 percentage points were higher than the statewide average. More than three-fifths of respondents involved in hiking and cycling on their most recent visit, the fourth-highest rate of any Kansas state park.

Source: CEDBR

Park Visitor Activities Relative to State



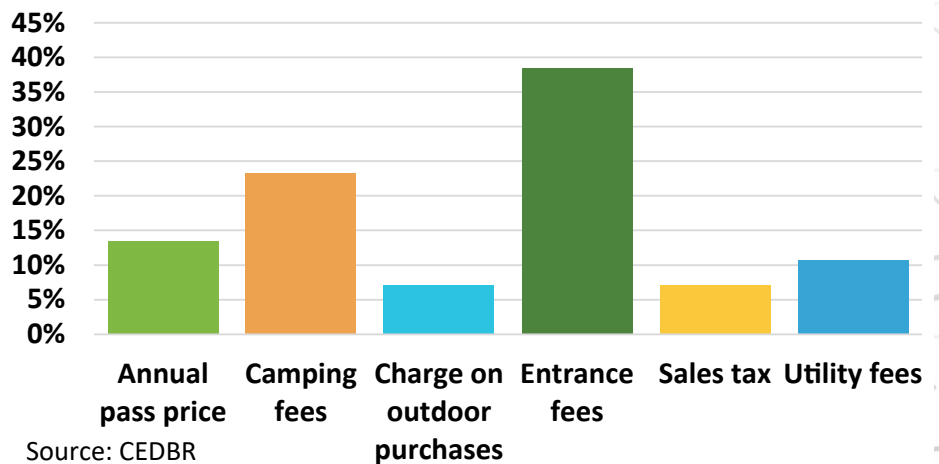
Support for increased fees to improve park services was 4.4 percentage points higher than average at the park.

Source: CEDBR

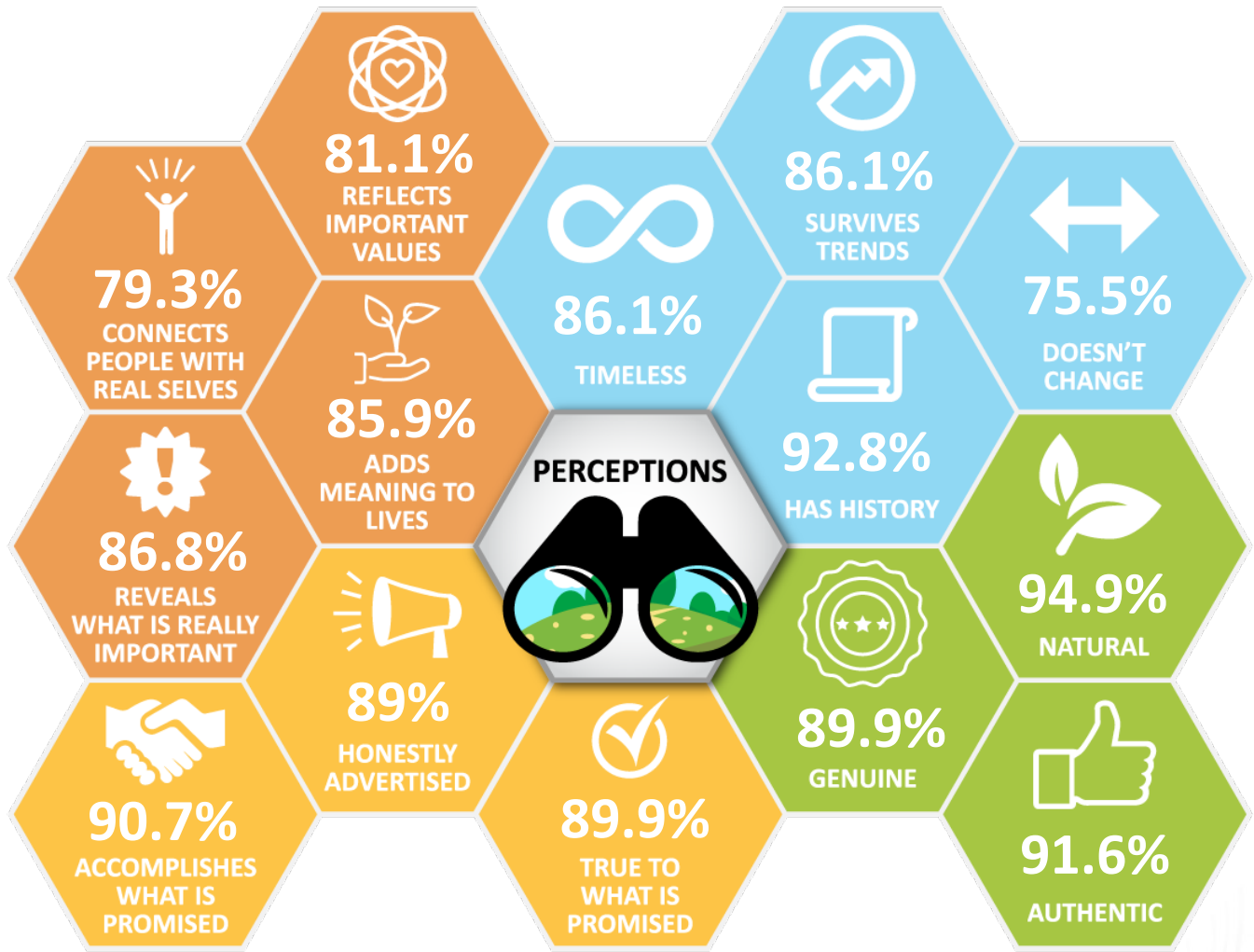
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



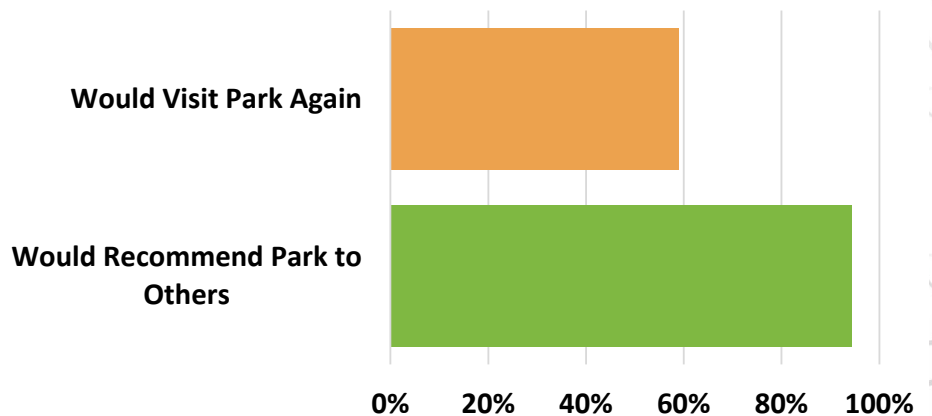
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 327
 Source: CEDBR survey 2020

More than 94 percent of survey respondents who visited Scott State Park would recommend the park, and the park received above-average marks in every perception category. Respondents agreed with the perception that the park was a place with history at a rate 24.3 percentage points higher than the average park, the second-highest rate in the state. Despite these high perceptions of the park, only 59 percent of respondents were likely to revisit the park within a year, the second-lowest rate in the state.

Park Visitor Satisfaction



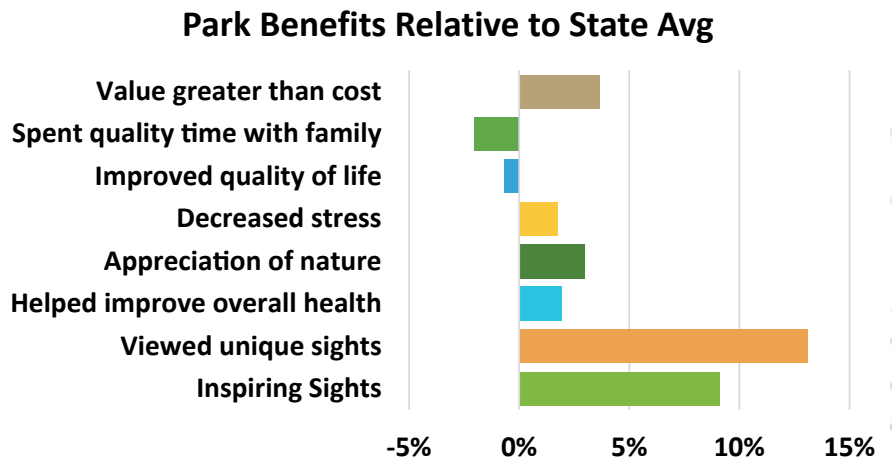
Source: CEDBR

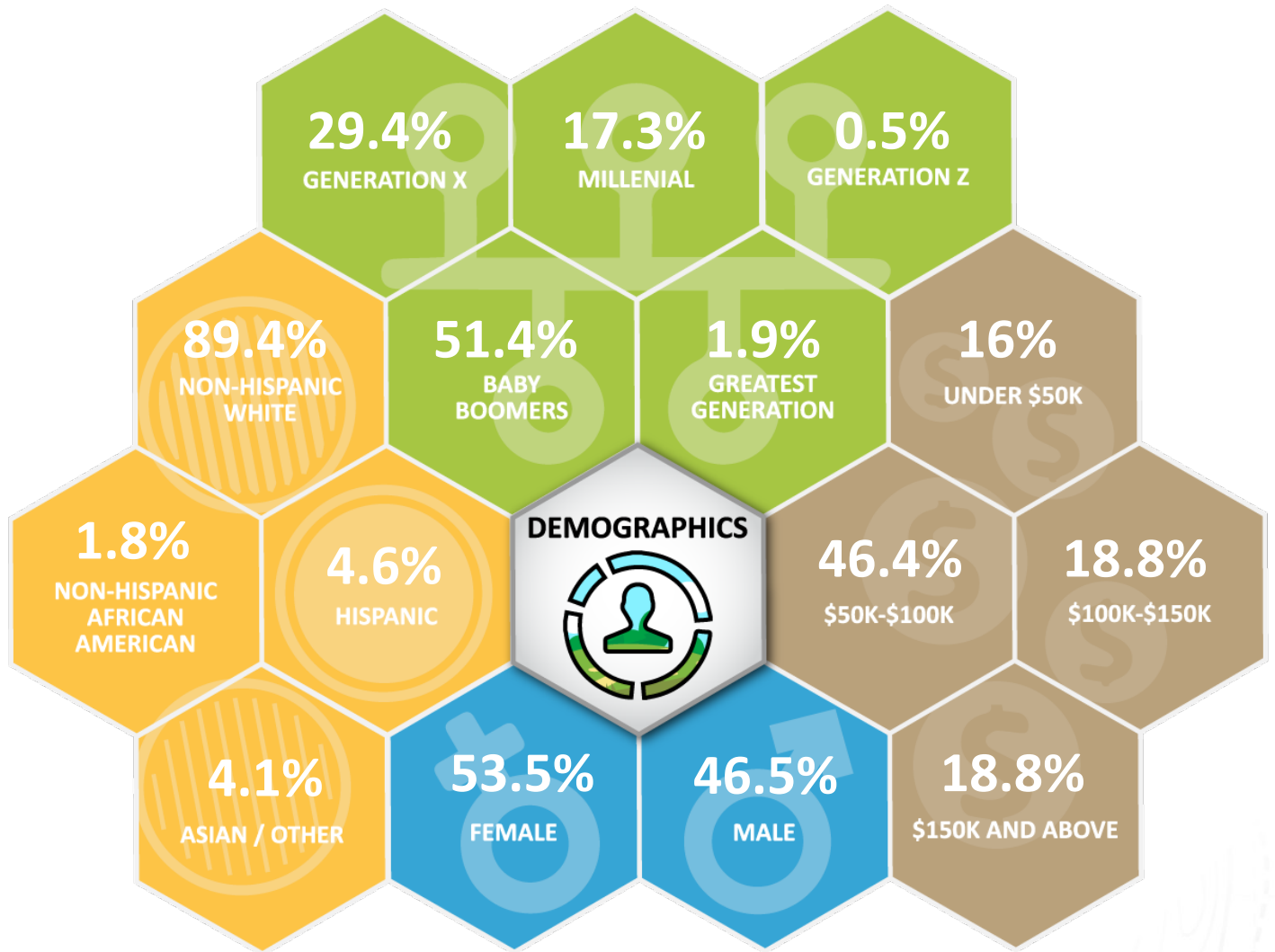


Scott State Park had the third-highest level of satisfaction among Kansas state park survey respondents, with 96.3 percent receiving more value from their trip to the park than its cost. The park provided five of the seven benefits surveyed at above-average levels, and respondents reported benefiting from inspiring and unique sights at rates 9.1 and 13.1 percentage points higher than the state park system average. The park was one of only seven in Kansas, where every benefit category was rated at 70 percent or higher by respondents.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	95%	90%	92%
Viewed unique sights	97%	97%	89%
Helped Improve Overall Health	75%	71%	68%
Appreciation of nature	84%	75%	76%
Decreased stress	89%	97%	86%
Improved Quality time with Family	80%	89%	78%
Spent quality time with family	89%	95%	89%
Value greater than cost	99%	97%	89%

Source: CEDBR

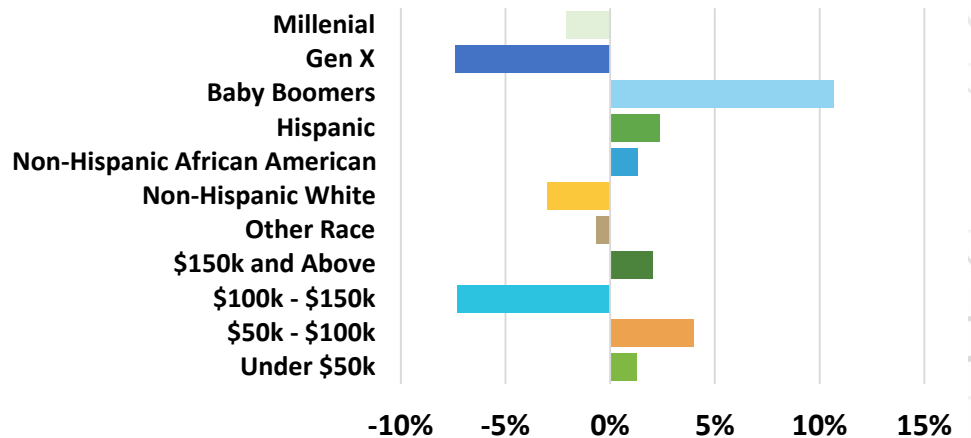




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Among survey respondents who visited Scott State Park, 10.6 percent identified as people of color, the highest rate of any Kansas state park. The park's share of Hispanic respondents, 4.6 percent, was the highest among Kansas state parks. The average Scott State Park respondent was 2.3 years older than the average respondent who visited any Kansas state park. The park had the second-highest share of respondents from the Baby Boomer generation in the park system, at 51.4 percent.

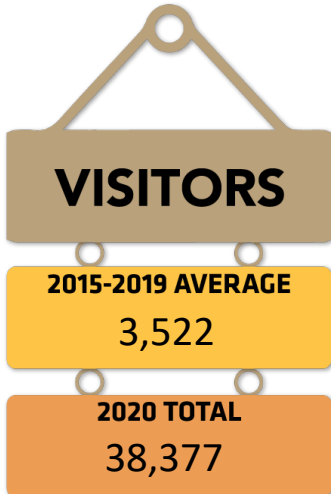
Park Visitor Demographics Relative to State Avg



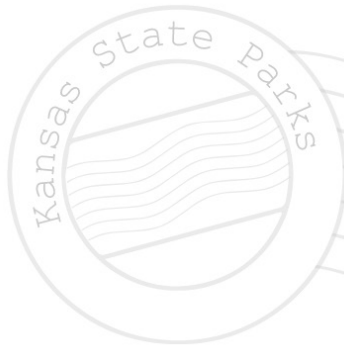
Source: CEDBR

LITTLE JERUSALEM BADLANDS STATE PARK | LOGAN COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$10,000	\$63,814	\$7,603	\$81,423
EMPLOYMENT	1	4	0	5
OUTPUT	\$30,500	\$163,181	\$31,347	\$225,028

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$42	-	\$353
Mining		\$99	-	\$1,800
Construction		\$173	-	\$874
Manufacturing		\$186	-	\$3,847
TIPU		\$3,786	-	\$23,639
Trade		\$36,048	2	\$51,800
Service		\$40,111	3	\$140,828
Government		\$979	-	\$1,888
Total		\$81,423	5	\$225,028

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$12,388	\$16,975	\$810	\$1,345	\$175
2020	\$128,366	\$175,226	\$8,418	\$12,880	\$1,585

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$62,447	\$18,979	\$480,302	\$197,929
Employment	4	0	24	6
Output	\$180,006	\$45,020	\$1,025,166	\$457,482

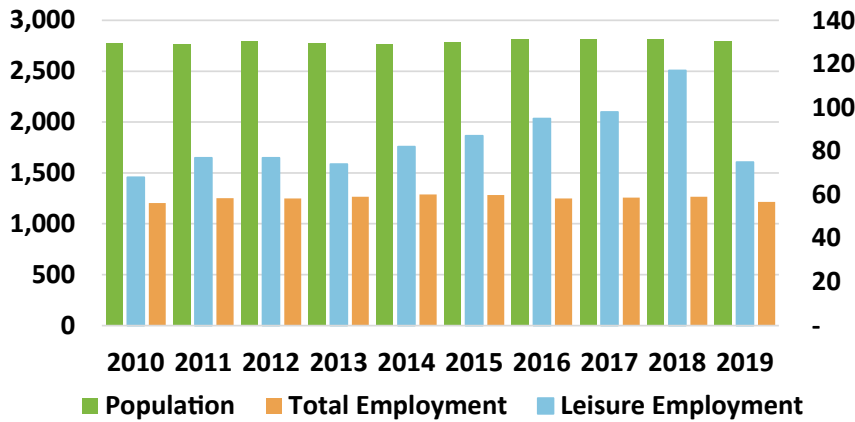
Source: CEDBR

Market Data

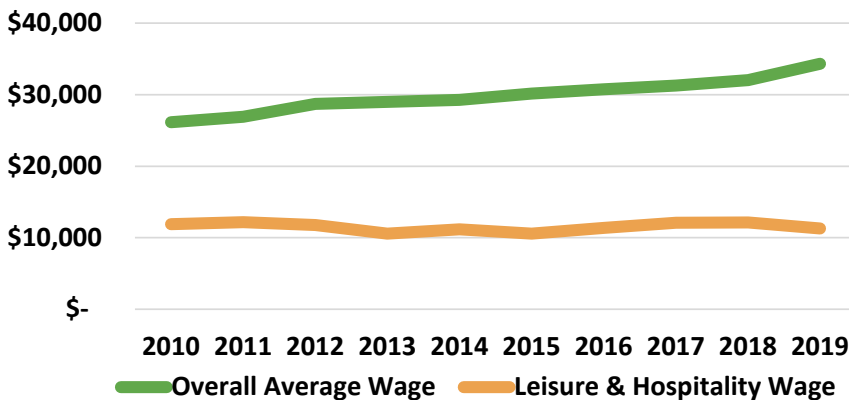
LOGAN COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	2,844	2,794	-1.8%	0.0%	8
Total Employment	1,266	1,215	-4.0%	-1.2%	19
Leisure & Hospitality Employment	117	75	-35.9%	-1.8%	18
Leisure & Hospitality Share	9.2%	6.2%	-3.1%	-0.6%	18
Average Annual Wage (All Industries)	\$32,030	\$34,324	7.2%	3.2%	1
Average Annual Wage (Leisure & Hosp)	\$12,152	\$11,307	-7.0%	0.2%	23
L&H Employment Location Quotient	0.99	0.66	-33.1%	-1.2%	15

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Logan Employment



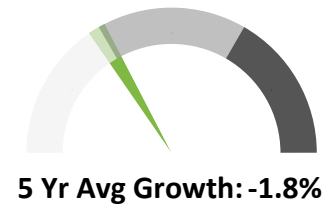
Logan Average Wages



Total Population



Leisure Employment



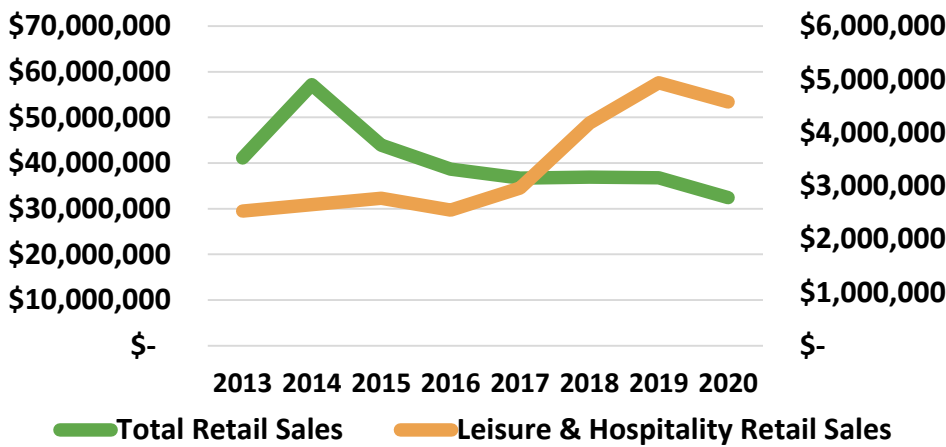
Average Leisure Wages



LOGAN COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$36,775,987	\$32,431,521	-11.8%	-5.9%	26
Leisure & Hospitality Retail Sales	\$4,937,449	\$4,574,663	-7.3%	10.6%	1
Per Capita Retail Sales	\$12,931.08	\$11,607.56	-10.2%	-5.9%	26
Per Capita L&H Retail Sales	\$1,736.09	\$1,637.32	-5.7%	10.6%	1
County Pull Factor (All Sales)	0.88	0.88	-0.8%	-9.4%	26
County Pull Factor (L&H Sales)	0.89	0.98	10.4%	11.1%	1

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Logan Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)



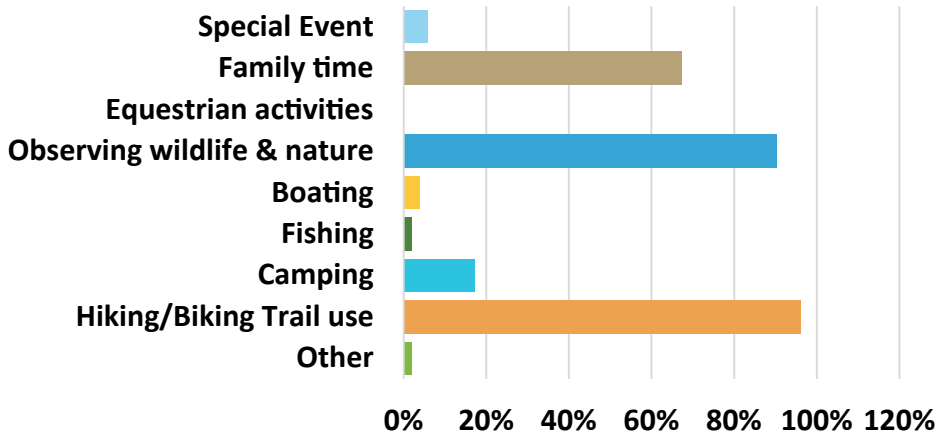
County Pull Factor (L&H)



The Little Jerusalem Badlands market area was the smallest of Kansas’ state park market areas in 2019, with a population of 2,794. The area boasted the highest average annual overall wage growth among the market areas from 2014 to 2019, increasing 17.2 percent. The area’s leisure and hospitality wages did not keep pace, growing only one percent, but the pattern was reversed for the area’s retail sales. The region had the largest total retail sales decline of any market area, with its overall retail pull factor declining from 1.43 to 0.88 from 2015 to 2020. The hospitality pull factor increased from 0.58 to 0.98, as hospitality spending per capita rose to approximately the state average level.

Visitor Survey

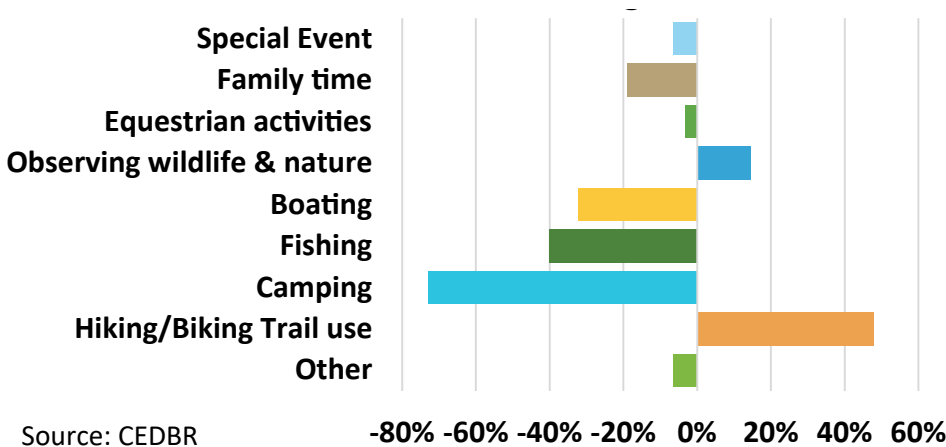
Park Visitor Activities



Hiking was the most popular activity at Little Jerusalem Badlands State Park. The survey respondents reported engaging in hiking activities at the highest rate of any state park, 96.2 percent.

Source: CEDBR

Park Visitor Activities Relative to State Avg



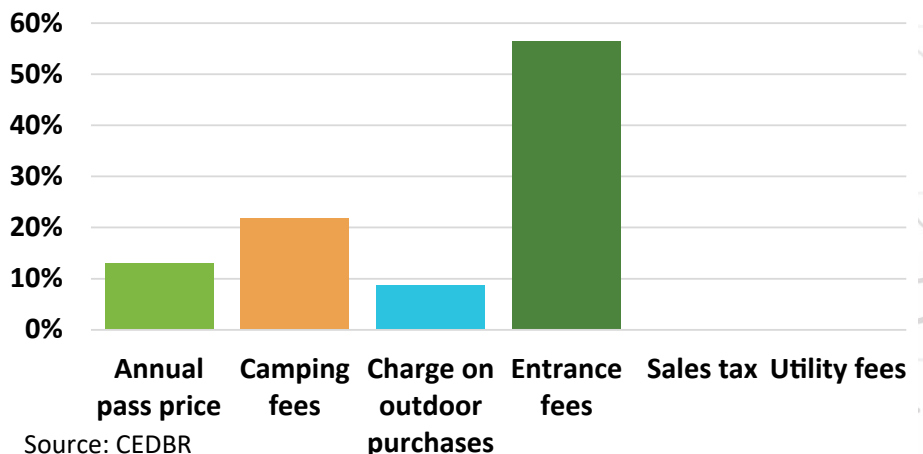
The park had the lowest engagement with fishing, boating, camping, and equestrian activities, as the park does not have the amenities. Respondents who visited the park also reported the lowest rate of special event participation, at 5.8 percent.

Source: CEDBR

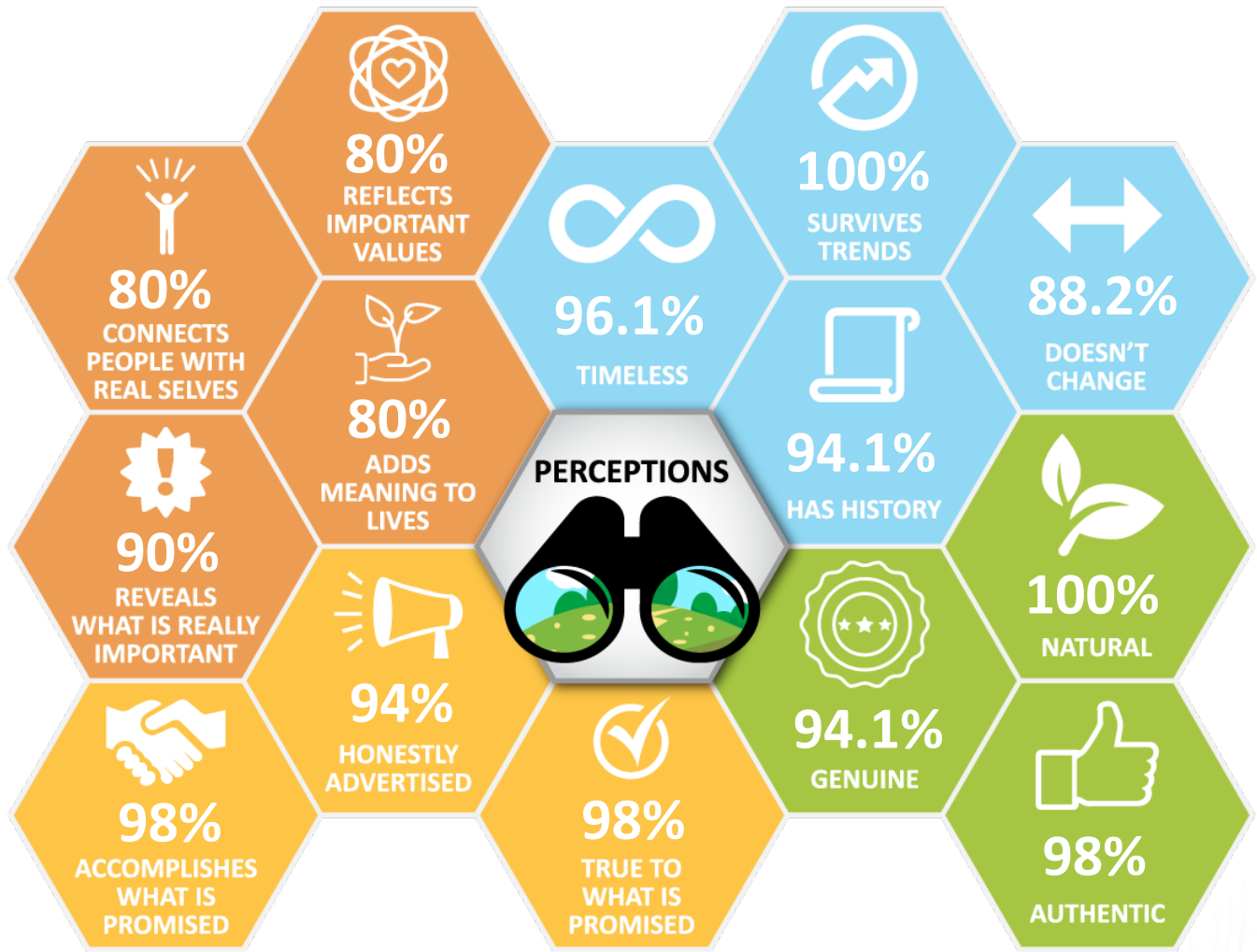
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



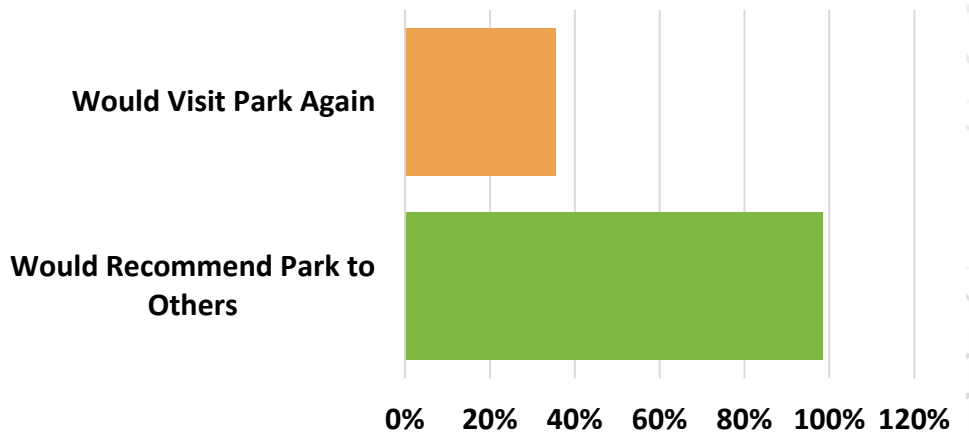
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 65
 Source: CEDBR survey 2020

Little Jerusalem Badlands State Park received the highest level of recommendations of any Kansas state park. More than 98 percent of survey respondents who visited the park were likely to recommend the park to others. Conversely, the park had the lowest rate of visitors likely to return to the park within 12 months, at only 35.4 percent, likely due to the park's relatively remote location within the state.

Park Visitor Satisfaction



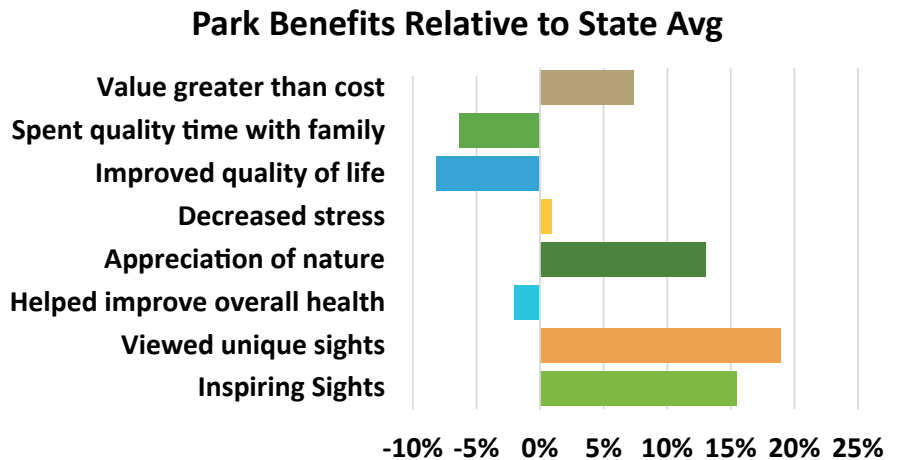
Source: CEDBR



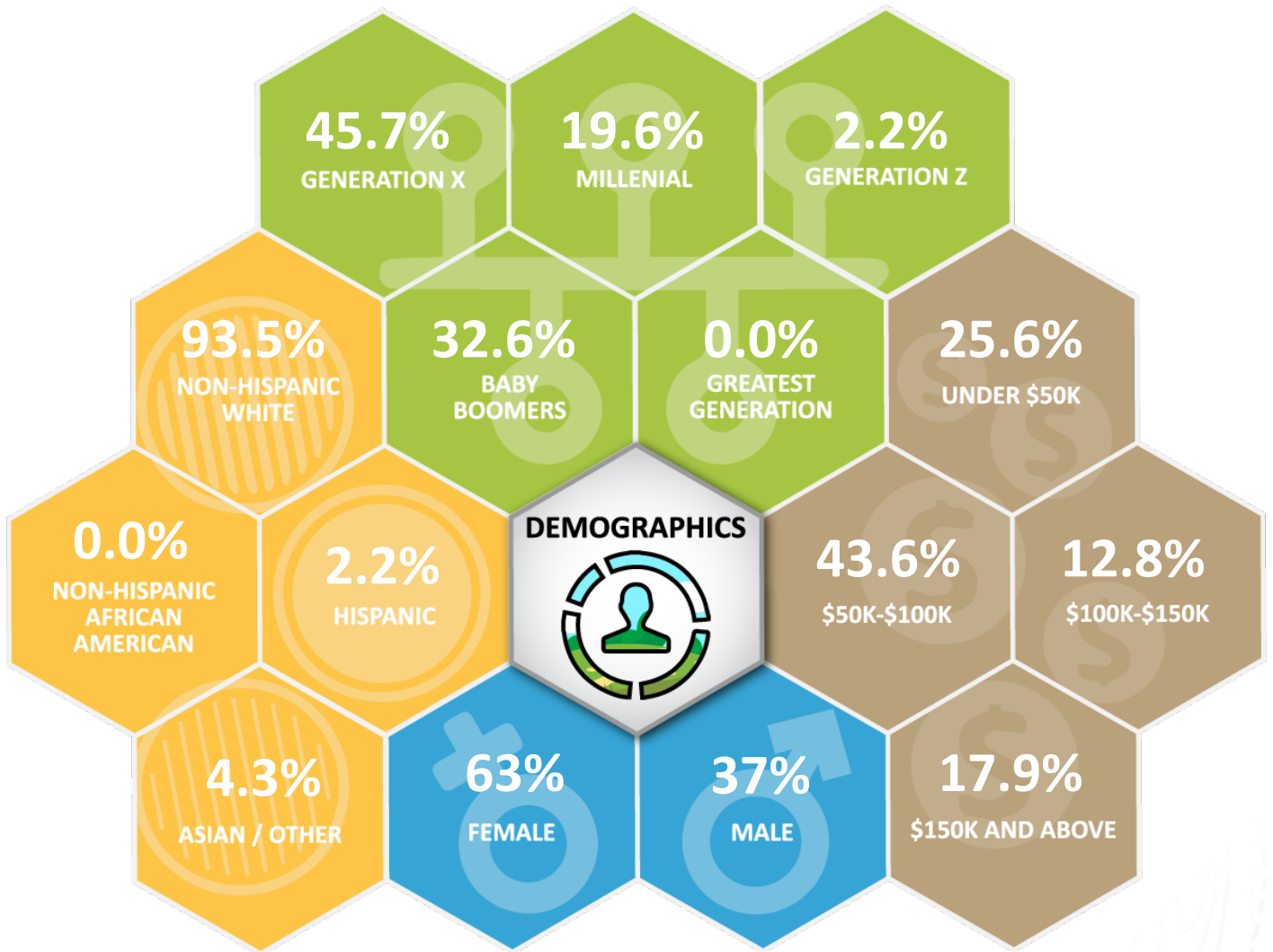
Every visitor to Little Jerusalem State Park who responded to the survey reported the value of their trip to the park was greater than its cost, the only park in Kansas to be so highly valued. The park ranked the highest in the state for respondents benefiting from inspiring sights, unique sights, and nature appreciation. Each of which was reported at rates 13 to 18 percentage points higher than the state park system average. The park scored below average when it came to improving health, decreasing stress, and spending quality time with family members.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	100%	100%	100%
Viewed unique sights	100%	100%	100%
Helped Improve Overall Health	53%	67%	89%
Appreciation of nature	87%	90%	89%
Decreased stress	80%	90%	100%
Improved Quality time with Family	67%	71%	89%
Spent quality time with family	80%	86%	89%
Value greater than cost	100%	100%	100%

Source: CEDBR



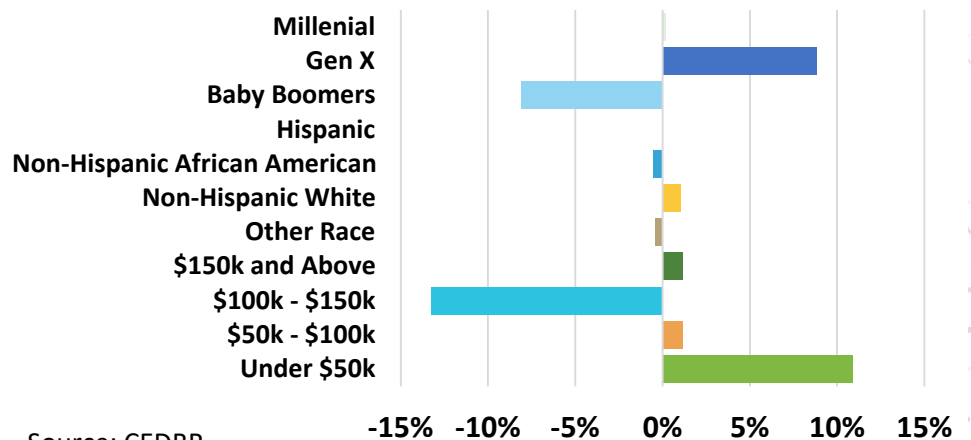
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Little Jerusalem State Park had the highest share of survey respondents who earned less than \$100,000, at 69.2 percent, of any Kansas state park. The park's share of respondents who earned between \$100,000 and \$150,000 was the lowest among state parks, though the share who earned \$150,000 or more was above average. Generation X was overrepresented from the park's survey respondents, whose 45.7 percent share was the most of any Kansas state park.

Park Visitor Demographics Relative to State Avg



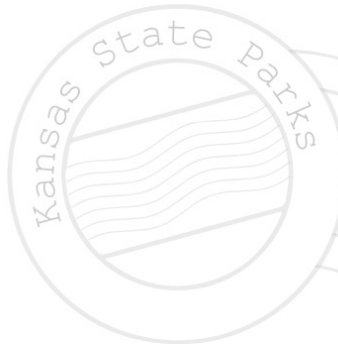
Source: CEDBR

LOVEWELL STATE PARK | JEWELL COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$205,448	\$3,721,498	\$382,484	\$4,309,427
EMPLOYMENT	4	153	10	166
OUTPUT	\$107,343	\$6,009,533	\$1,574,039	\$7,690,924

Source: CEDBR

LOVEWELL STATE PARK | JEWELL COUNTY (CONTINUED)

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$2,330	-	\$12,712
Mining		\$2,777	-	\$32,162
Construction		\$8,352	-	\$40,538
Manufacturing		\$10,034	-	\$121,554
TIPU		\$176,178	3	\$722,172
Trade		\$2,809,923	123	\$3,245,980
Service		\$1,273,633	40	\$3,458,960
Government		\$26,201	0	\$56,847
Total		\$4,309,427	166	\$7,690,924

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$666,930	\$1,028,039	\$69,062	\$91,998	\$7,824
2020	\$846,491	\$1,304,705	\$87,653	\$116,740	\$9,907

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$3,156,600	\$1,152,827	\$3,935,904	\$1,463,478
Employment	131	36	164	46
Output	\$5,187,600	\$2,503,325	\$6,559,430	\$3,176,828

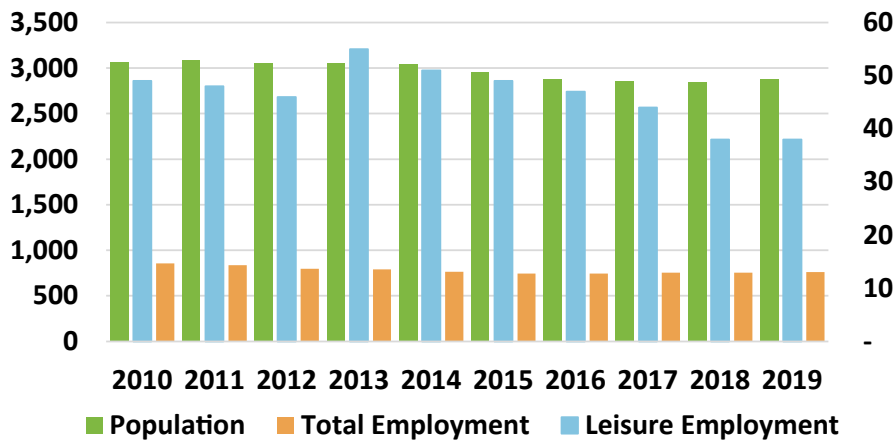
Source: CEDBR

Market Data

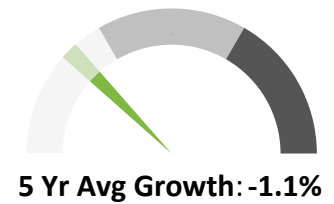
JEWELL COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	2,841	2,879	1.3%	-1.1%	20
Total Employment	754	761	0.9%	-0.1%	12
Leisure & Hospitality Employment	38	38	0.0%	-5.7%	26
Leisure & Hospitality Share	5.0%	5.0%	0.0%	-5.7%	25
Average Annual Wage (All Industries)	\$29,800	\$30,282	1.6%	2.6%	12
Average Annual Wage (Leisure & Hosp)	\$12,118	\$12,575	3.8%	6.1%	2
L&H Employment Location Quotient	0.54	0.53	-0.8%	-6.3%	20

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Jewell Employment



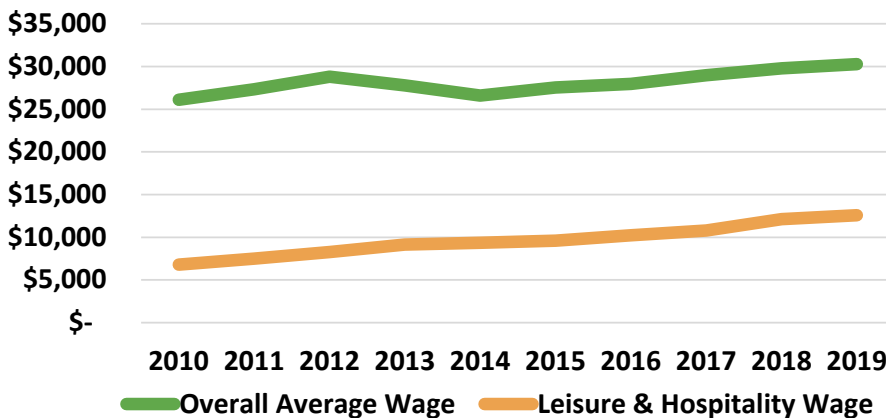
Total Population



Leisure Employment



Jewell Average Wages

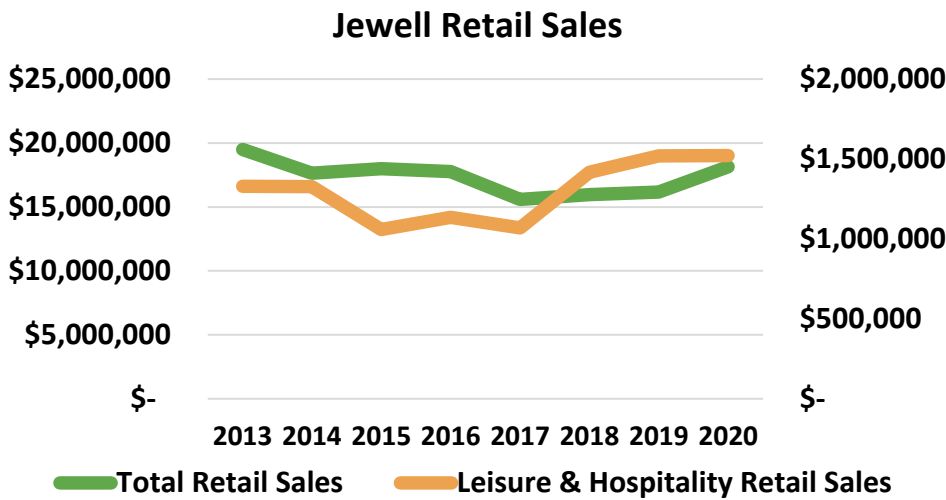


Average Leisure Wages



JEWELL COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$16,169,322	\$18,132,133	12.1%	0.2%	18
Leisure & Hospitality Retail Sales	\$1,519,296	\$1,522,167	0.2%	7.5%	2
Per Capita Retail Sales	\$5,691.42	\$6,298.07	10.7%	1.3%	15
Per Capita L&H Retail Sales	\$534.77	\$528.71	-1.1%	8.7%	2
County Pull Factor (All Sales)	0.38	0.37	-2.3%	-1.7%	17
County Pull Factor (L&H Sales)	0.27	0.32	15.7%	9.2%	2

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

The market area for Lovewell Park was the third smallest in population, among Kansas state park market areas. The area’s share of leisure and hospitality employment was the second smallest at 5 percent of the employed workforce. The area’s annual average hospitality wages increased 34.5 percent from 2014 to 2019, the second-fastest growth among the market areas, more than twice the overall statewide hospitality wage growth rate. The region also experienced the second-fastest growth in its per capita hospitality retail sales, which increased 51.9 percent from 2015 to 2020.

Total Taxable Retail Sales



5 Yr Avg Growth: 0.2%

Leisure Retail Sales



5 Yr Avg Growth: 7.5%

County Pull Factor (All)



5 Yr Avg Growth: -1.7%

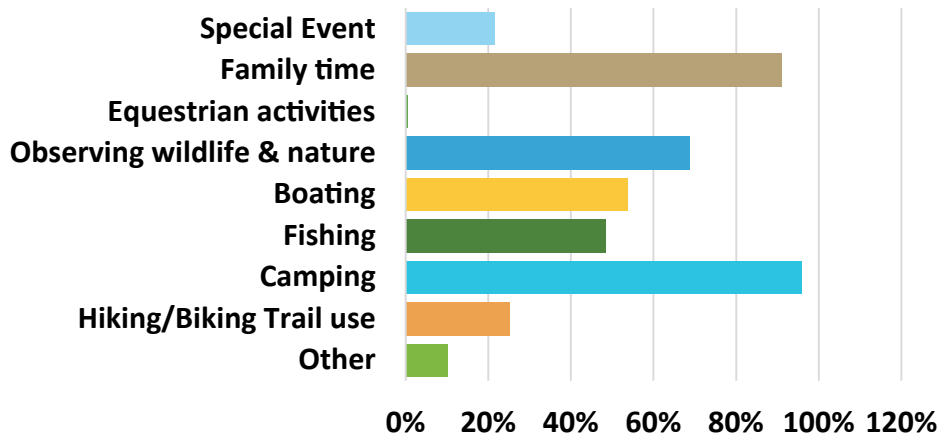
County Pull Factor (L&H)



5 Yr Avg Growth: 9.2%

Visitor Survey

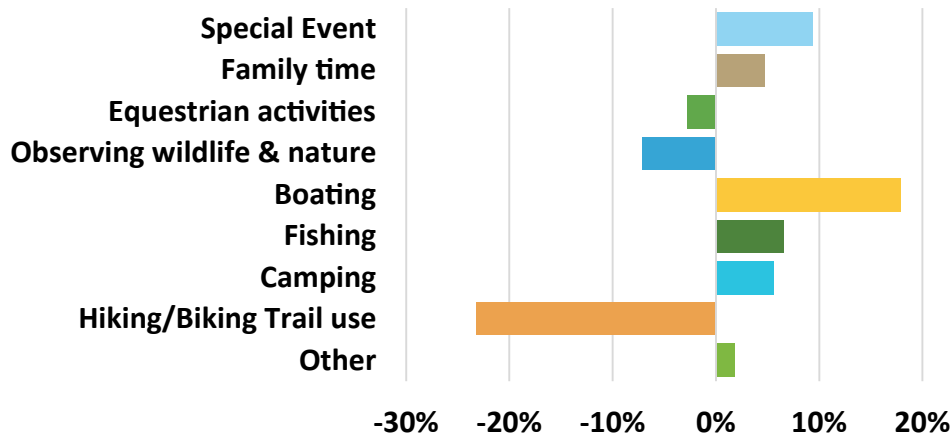
Park Visitor Activities



Survey respondents who visited Lovewell State Park reported the highest rate of special event attendance of any state park, with 21.6 percent. The park's most popular activities were camping and family time, both with 90 percent or higher rates.

Source: CEDBR

Park Visitor Activities Relative to State Avg



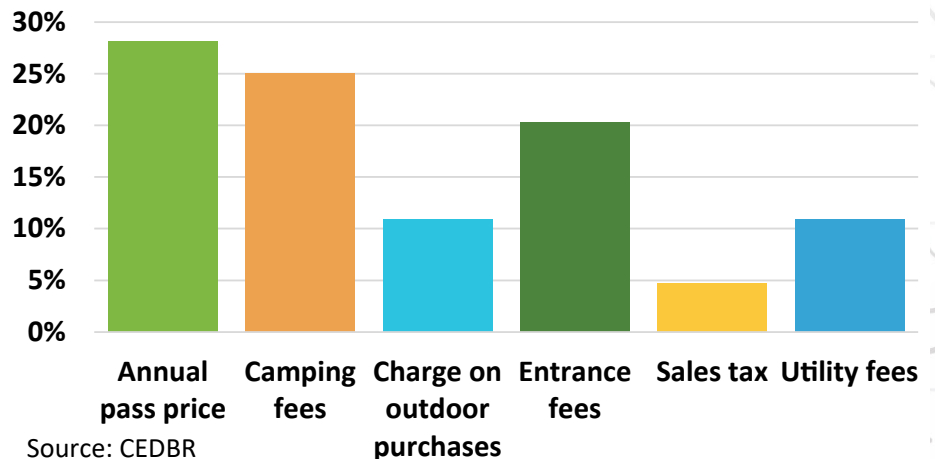
The park's respondents had the lowest engagement with hiking and cycling activities, 25.1 percent, which was more than 23 percent lower than the state park system average.

Source: CEDBR

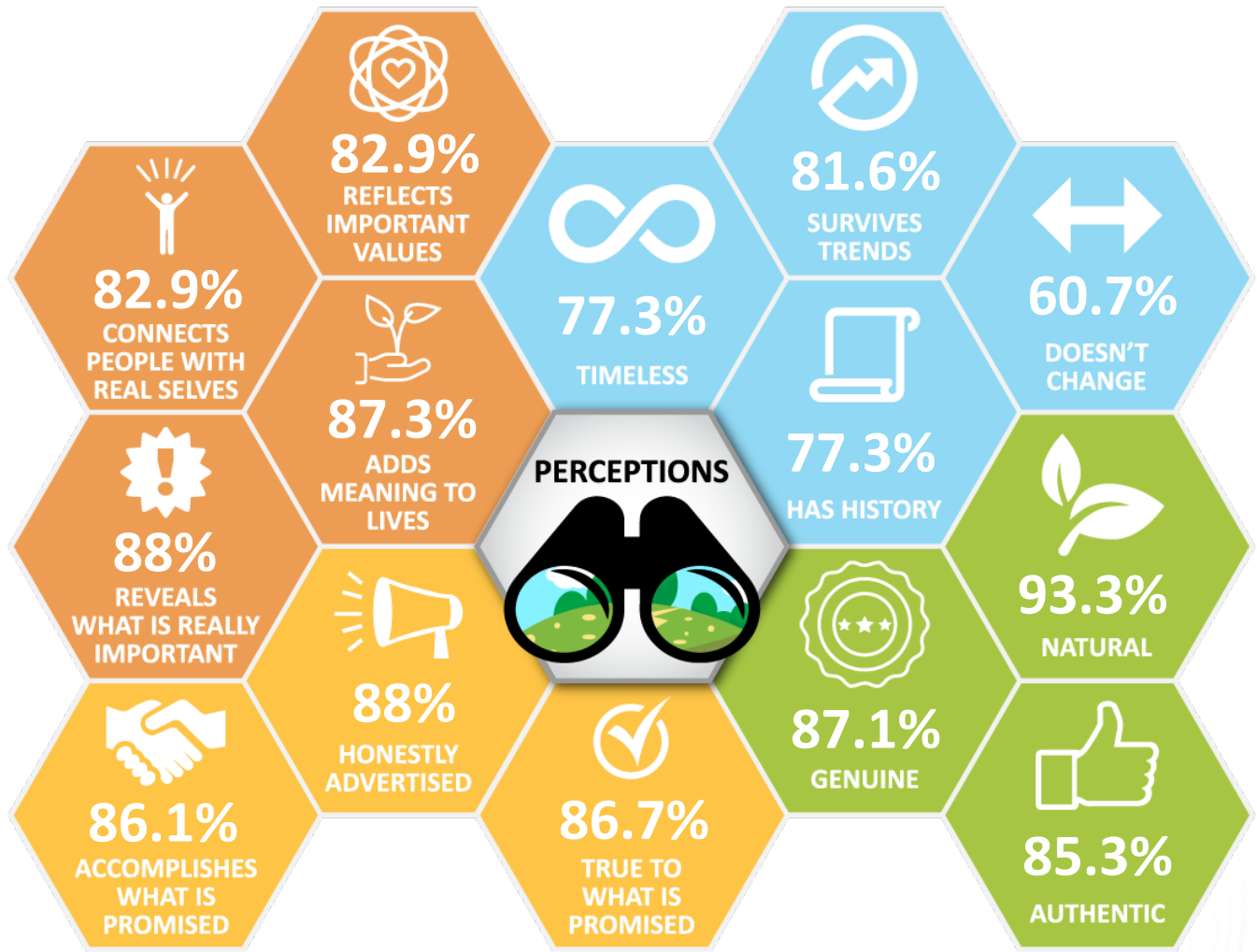
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



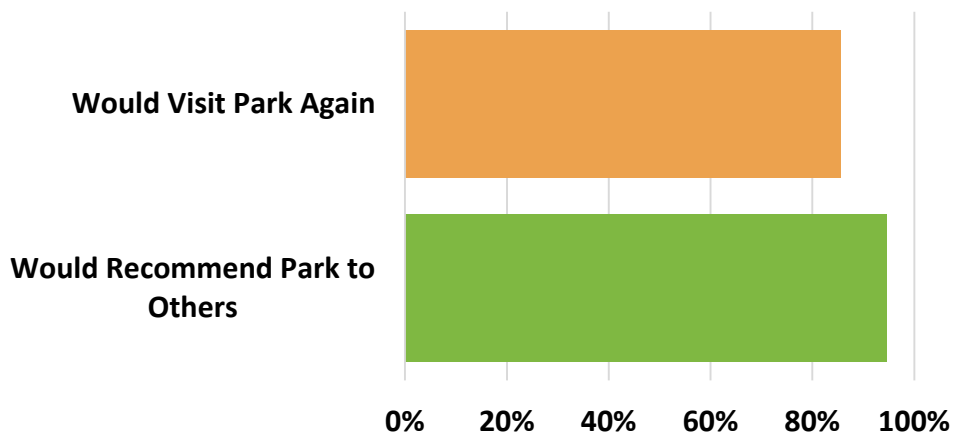
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 244
 Source: CEDBR survey 2020

Survey respondents who visited Lovewell State Park were so pleased with their trips that 94.7 percent would recommend the park, and 85.5 percent were likely to revisit the park within a year, both of which were higher rates than the state park system average. The park was also highly rated for perceptions of being genuine, honestly advertised, and a place that adds meaning to people's lives, all of which at rates 3 percentage points or more above the state average.

Park Visitor Satisfaction



Source: CEDBR

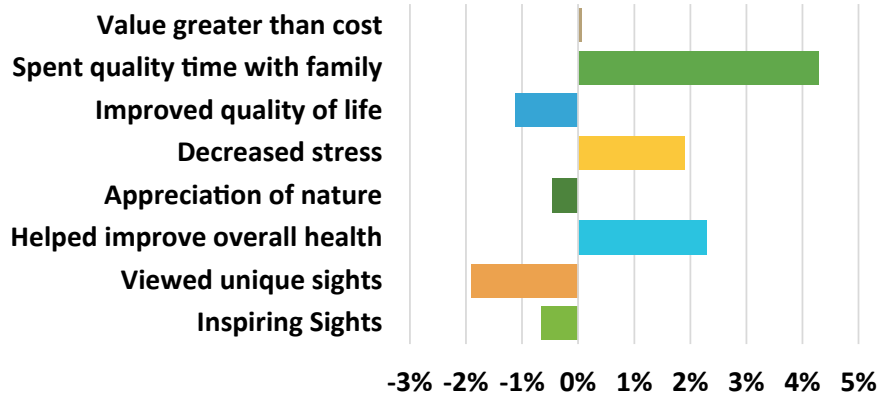


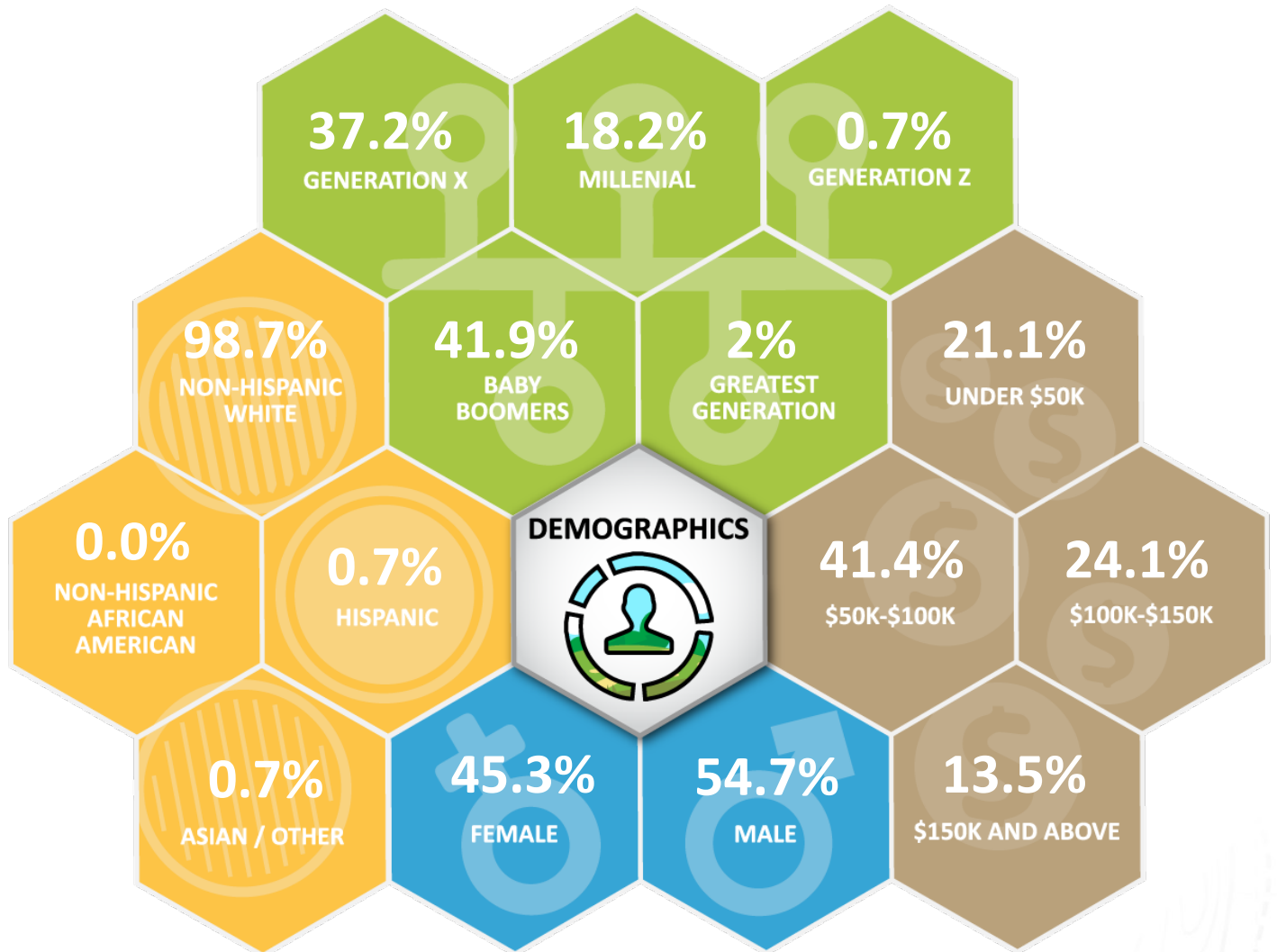
Survey respondents who visited Lovewell State Park benefited from their visit at rates similar to that of the average state park, with every category but one rated within two percentage points of the state average. Respondents reported benefiting from spending quality time with their family members at a rate 4.3 percentage points higher than average at Lovewell, the highest rate among any Kansas state park. More than 92 percent of respondents valued their visit to the park higher than its costs.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	81%	85%	74%
Viewed unique sights	79%	84%	70%
Helped Improve Overall Health	66%	78%	67%
Appreciation of nature	79%	80%	59%
Decreased stress	87%	89%	96%
Improved Quality time with Family	82%	84%	70%
Spent quality time with family	95%	98%	100%
Value greater than cost	90%	96%	96%

Source: CEDBR

Park Benefits Relative to State Avg

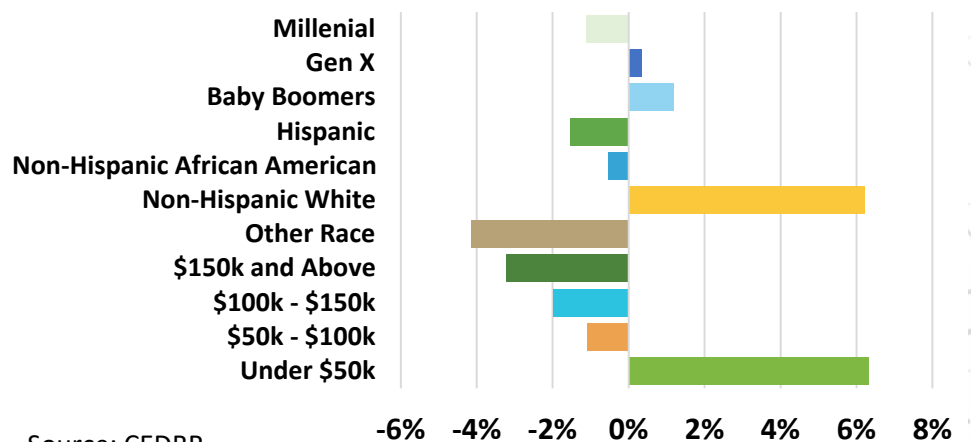




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

With fewer than 2 percent of survey respondents who visited Lovewell State Park identifying as people of color, the park had the highest share of non-Hispanic white visitors of any Kansas state park. The park's respondents also tended to be older and disproportionately from the Baby Boomer generation and Generation X than the average state park. Lovewell State Park had a share of earners \$150,000 or more, which was 3.3 percentage points below the state average.

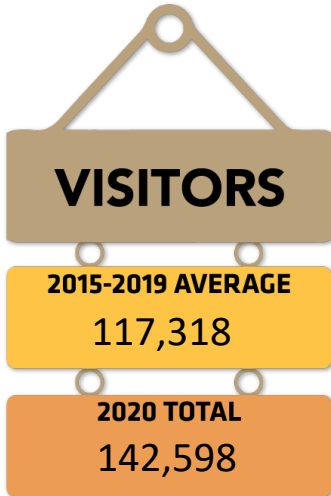
Park Visitor Demographics Relative to State Avg



Source: CEDBR

MEADE STATE PARK | MEADE COUNTY

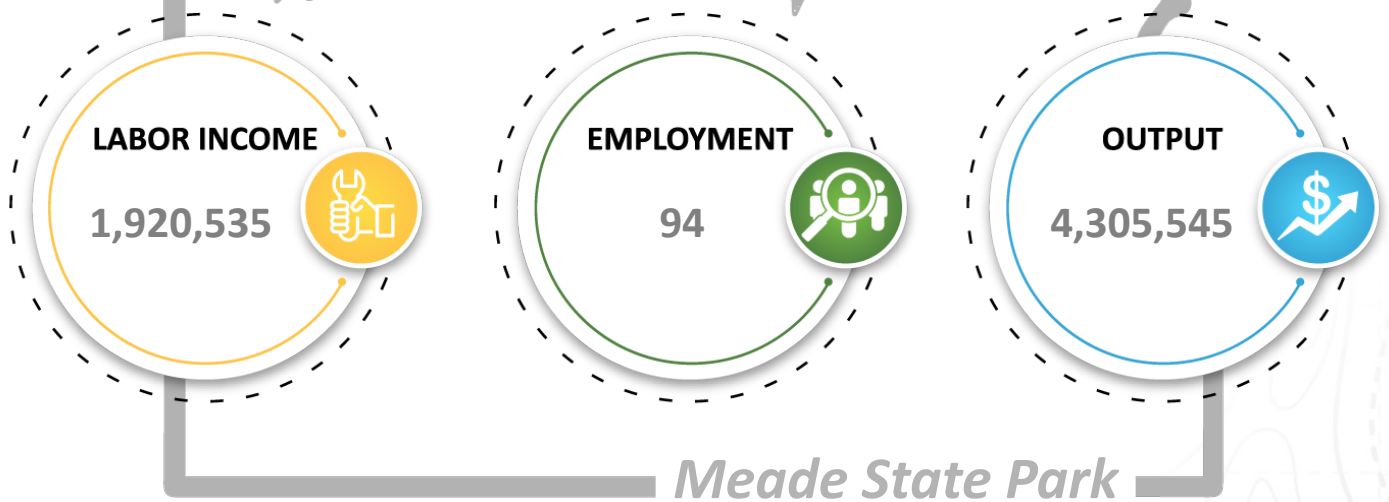
Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$126,468	\$1,635,094	\$158,969	\$1,920,535
EMPLOYMENT	3	87	4	94
OUTPUT	\$67,500	\$3,598,017	\$640,033	\$4,305,545

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 		\$1,756	-	\$7,047
Mining 		\$2,965	-	\$34,787
Construction 		\$6,622	-	\$24,153
Manufacturing 		\$5,930	-	\$85,978
TIPU 		\$129,971	2	\$751,658
Trade 		\$1,065,250	69	\$1,587,765
Service 		\$685,065	23	\$1,779,177
Government 		\$22,975	0	\$34,980
Total		\$1,920,535	94	\$4,305,545

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$302,698	\$624,294	\$30,556	\$41,392	\$1,772
2020	\$368,059	\$759,169	\$37,154	\$50,326	\$2,155

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,344,403	\$576,128	\$1,665,867	\$700,359
Employment	76	18	92	22
Output	\$3,023,376	\$1,282,167	\$3,674,537	\$1,558,829

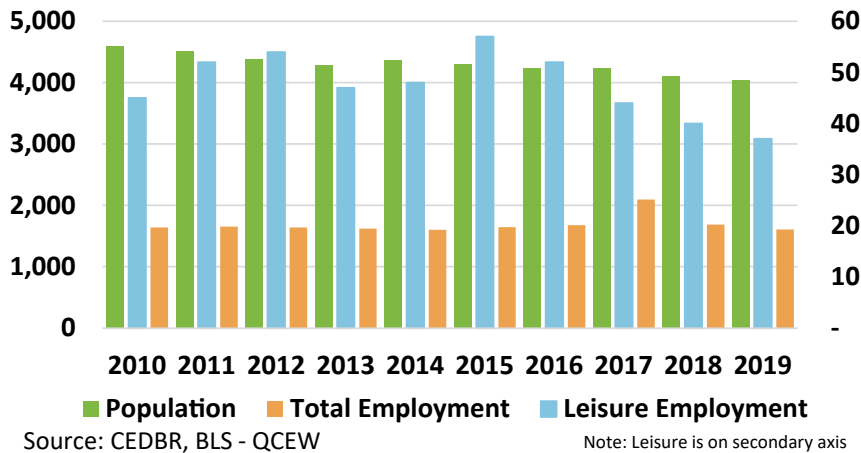
Source: CEDBR

Market Data

MEADE COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	4,146	4,033	-2.7%	-1.5%	25
Total Employment	1,686	1,605	-4.8%	0.0%	10
Leisure & Hospitality Employment	40	37	-7.5%	-5.1%	22
Leisure & Hospitality Share	2.4%	2.3%	-0.1%	-5.1%	23
Average Annual Wage (All Industries)	\$41,424	\$42,926	3.6%	3.2%	2
Average Annual Wage (Leisure & Hosp)	\$9,903	\$10,985	10.9%	2.7%	11
L&H Employment Location Quotient	0.25	0.25	-2.7%	-5.7%	18

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Meade Employment



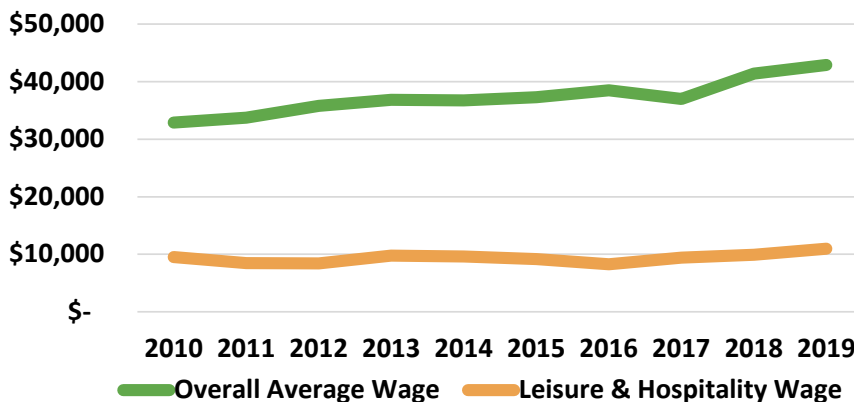
Total Population



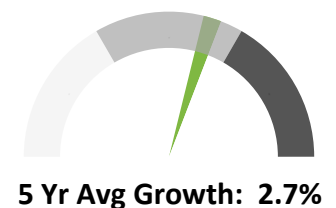
Leisure Employment



Meade Average Wages

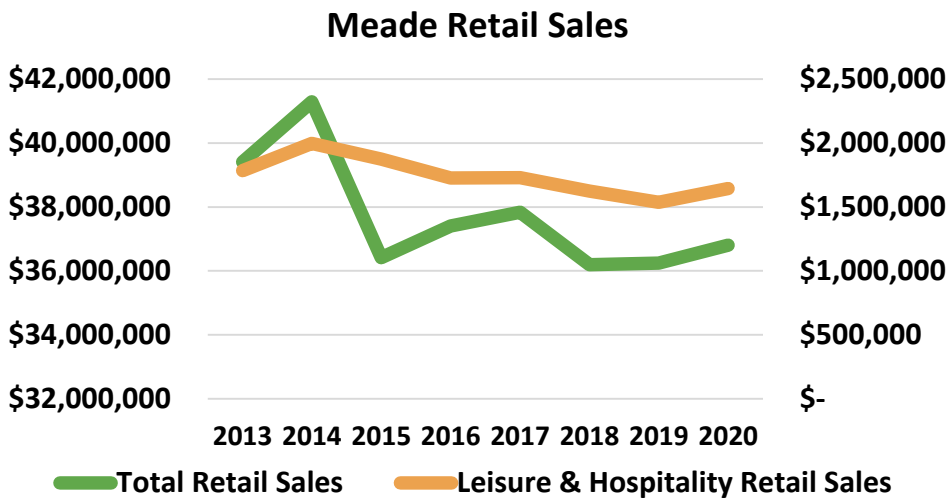


Average Leisure Wages



MEADE COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$36,240,011	\$36,803,207	1.6%	0.2%	17
Leisure & Hospitality Retail Sales	\$1,536,248	\$1,643,122	7.0%	-2.6%	25
Per Capita Retail Sales	\$8,740.96	\$9,125.52	4.4%	1.8%	12
Per Capita L&H Retail Sales	\$370.54	\$407.42	10.0%	-1.1%	23
County Pull Factor (All Sales)	0.59	0.60	0.6%	-2.1%	19
County Pull Factor (L&H Sales)	0.19	0.24	28.7%	-0.6%	23

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



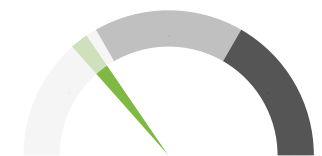
5 Yr Avg Growth: 0.2%

Leisure Retail Sales



5 Yr Avg Growth: -2.6%

County Pull Factor (All)



5 Yr Avg Growth: -2.1%

County Pull Factor (L&H)

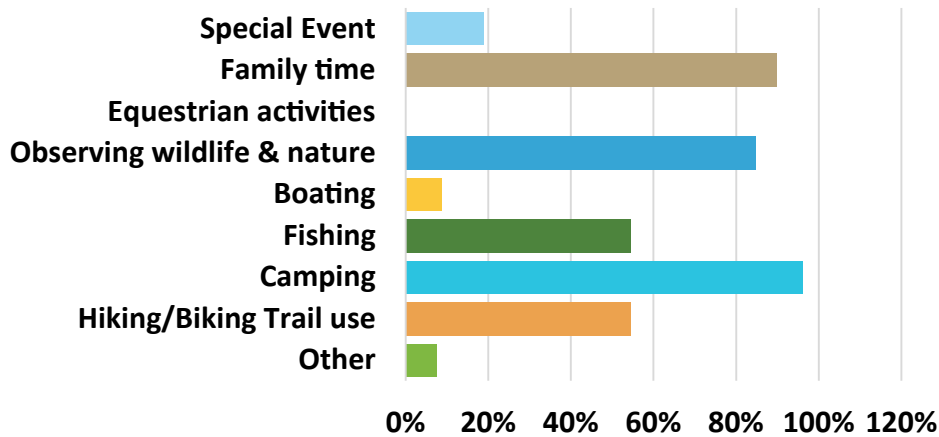


5 Yr Avg Growth: -0.6%

The market area for Meade Park was, in 2019, one of the five smallest Kansas state park market areas, with a population of 4,033, and was also experiencing one of the fastest population declines, losing more than 300 residents from 2014 to 2019. The area's average annual wages were both the second-highest and second-fastest growing among the market areas, increasing 16.8 percent when the state average increased only 12.5 percent. The region had a relatively low level of retail sales for its size, less than 60 percent of the state average in per person sales in 2020, and hospitality sales lagged even further behind, at less than a quarter of the state average.

Visitor Survey

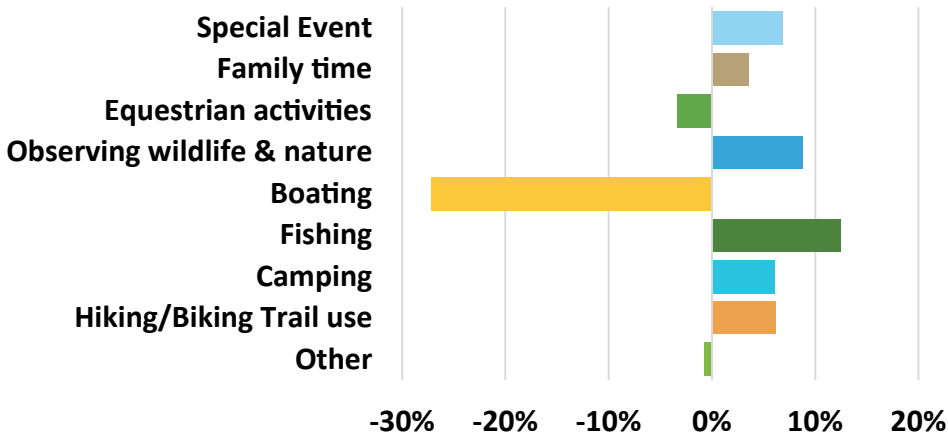
Park Visitor Activities



Meade State Park’s survey respondents reported the largest gap in fishing activities and boating activities of any Kansas state park. Only 8.9 percent reported engaging in boating activities, while 54.4 percent reported engaging in fishing activities, a gap of 45.6 percent, compared to a statewide average gap of 6 percent.

Source: CEDBR

Park Visitor Activities Relative to State Avg



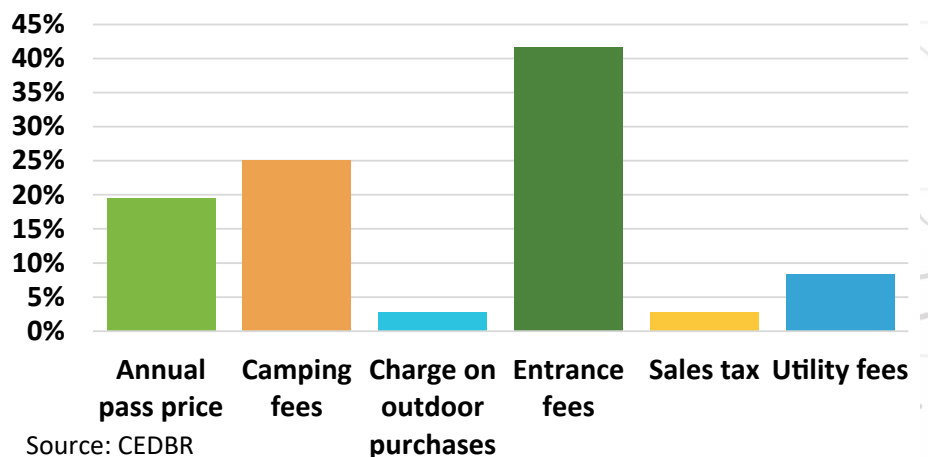
The most popular activities at the park also included camping, observing nature, and family time, each of which were engaged in by more than 70 percent of respondents.

Source: CEDBR

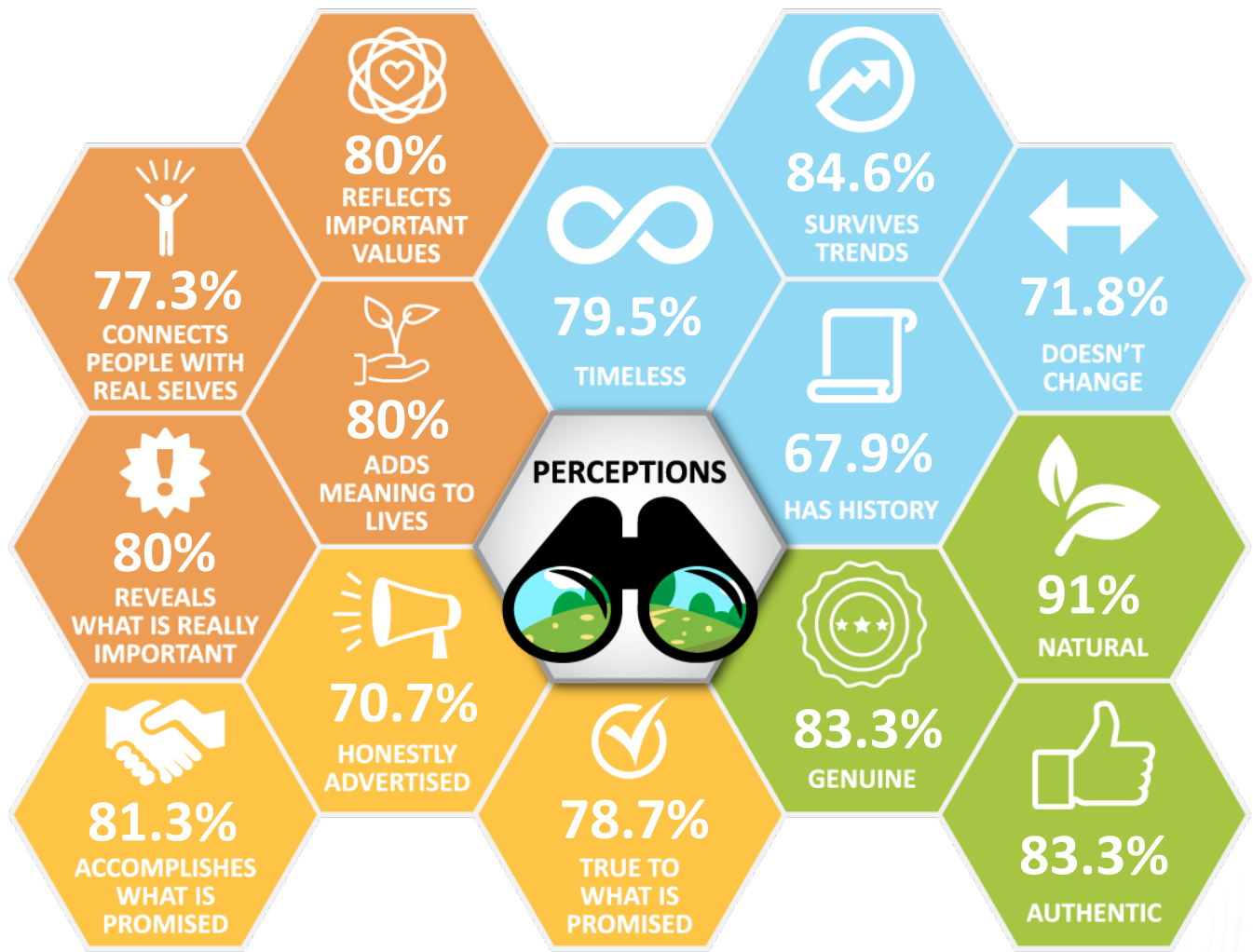
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



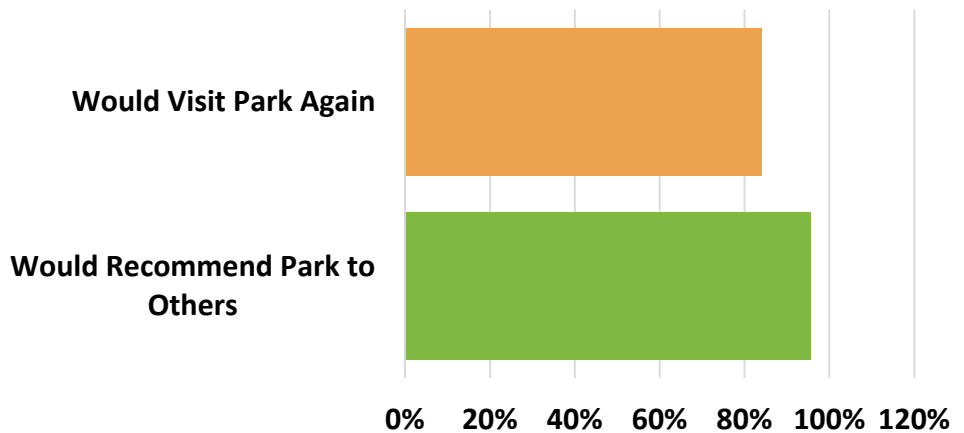
Source: CEDBR



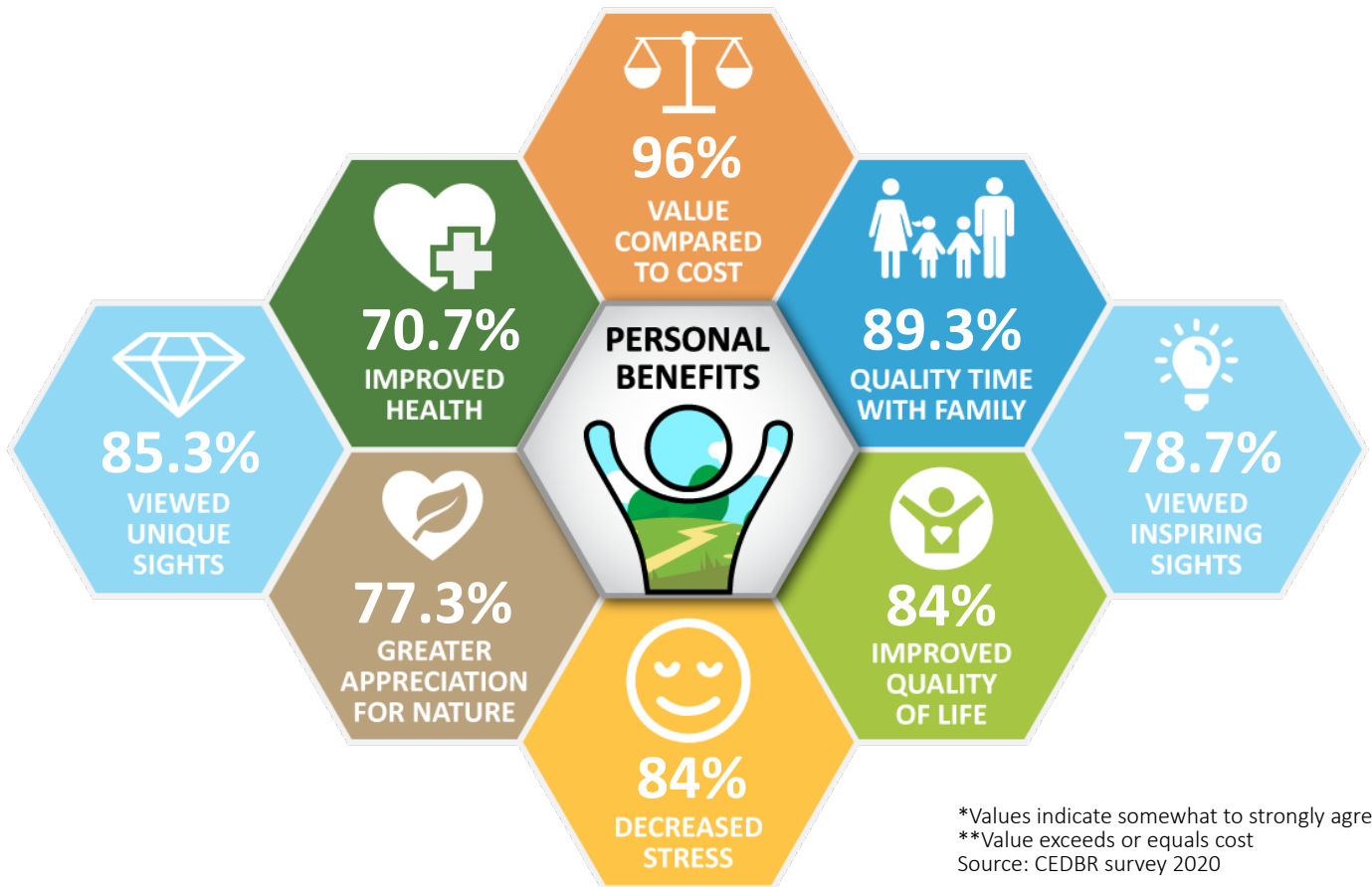
*Values indicate somewhat to strongly agree
 **N= 114
 Source: CEDBR survey 2020

Less than five percent of survey respondents who visited Meade State Park would not recommend the park to other visitors, one of the best rates in the state. Almost 84 percent of respondents were likely to visit the park again within 12 months, a rate 4 percentage points higher than the overall state park system. Perception categories related to stability were where the park was ranked the highest above the state average, as a place that survives trends and is timeless.

Park Visitor Satisfaction



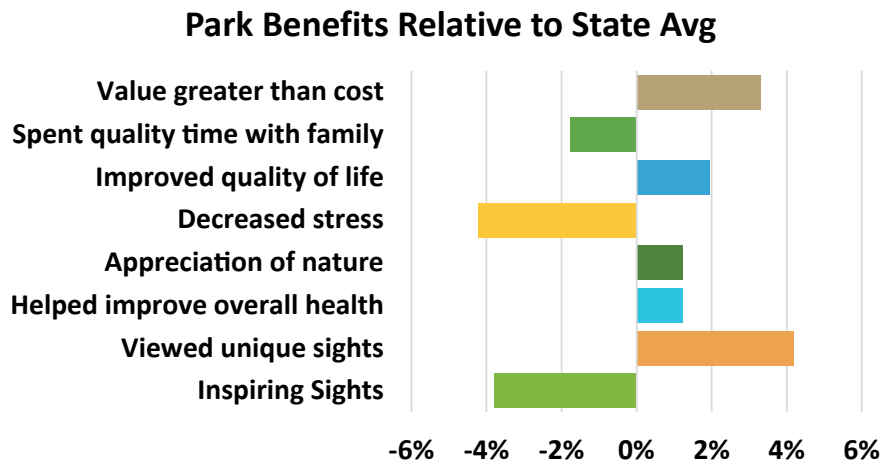
Source: CEDBR

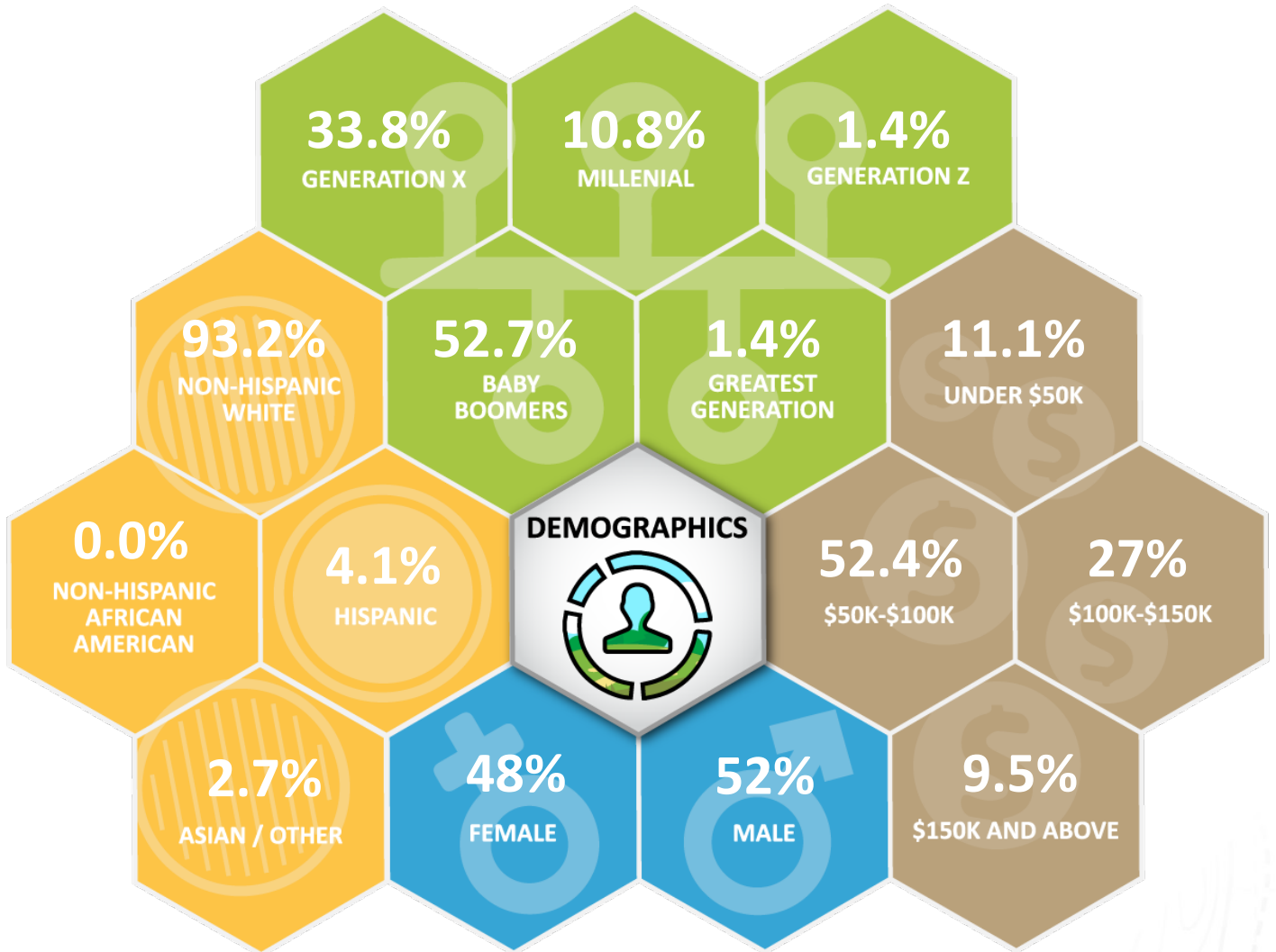


Only 4 percent of survey respondents who visited Meade State Park received less value from their visit than its cost, making visitors there the second-most satisfied of any Kansas state park, 3.3 percentage points above the state average. The two most common benefits visitors received from the park were viewing unique sights and spending quality time with family members. The benefit experienced at a rate with the largest difference below the state average was decreasing stress. Millennials were the most positive about Meade, giving it the highest rating possible in five of the seven benefit categories.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	74%	80%	100%
Viewed unique sights	77%	92%	100%
Helped Improve Overall Health	67%	72%	88%
Appreciation of nature	72%	76%	100%
Decreased stress	85%	80%	100%
Improved Quality time with Family	82%	88%	88%
Spent quality time with family	90%	88%	100%
Value greater than cost	95%	96%	100%

Source: CEDBR

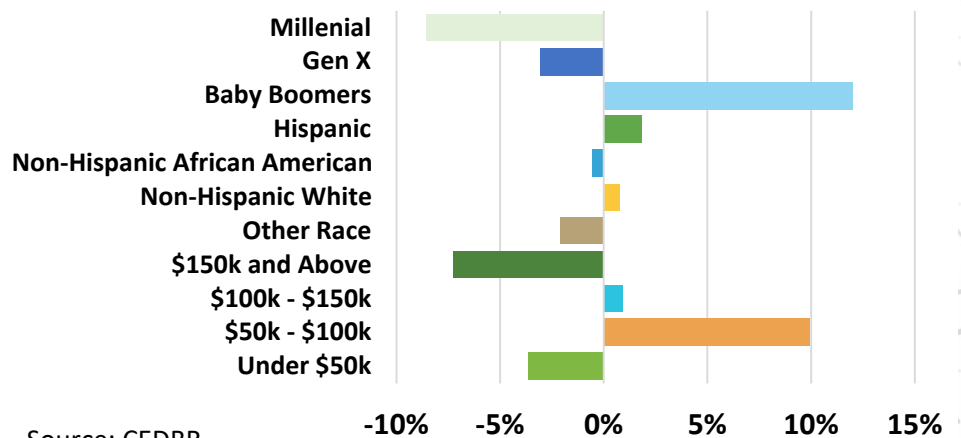




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Meade State Park had the highest share of survey respondents from the Baby Boomer generation, 12 percentage points higher than average, and the third-lowest share of respondents from the Millennial generation. The park's respondents were, on average, 2.2 years older than those from the overall park system. Visitors to the park tended to be lower income than the average state park visitor, with a 5.5 percentage point higher share of those earning less than \$100,000 compared to the overall park system.

Park Visitor Demographics Relative to State Avg



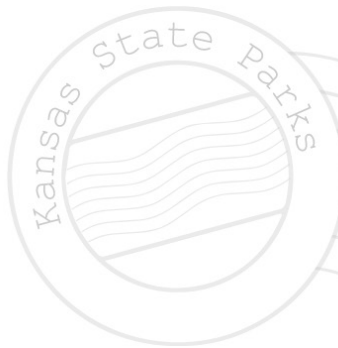
Source: CEDBR

MILFORD STATE PARK | GEARY COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$274,905	\$7,208,533	\$714,059	\$8,197,493
EMPLOYMENT	6	303	17	326
OUTPUT	\$251,562	\$13,253,594	\$2,524,640	\$16,029,794

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$3,410	-	\$19,051
Mining		\$4,174	0	\$49,505
Construction		\$18,550	0	\$65,698
Manufacturing		\$26,205	0	\$247,697
TIPU		\$354,848	6	\$1,441,994
Trade		\$5,160,540	240	\$6,189,365
Service		\$2,563,023	79	\$7,849,993
Government		\$66,743	1	\$166,490
Total		\$8,197,493	326	\$16,029,794

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$410,248	\$323,635	\$40,446	\$131,546	\$22,754
2020	\$344,147	\$271,489	\$33,931	\$110,824	\$19,237

Source: CEDBR

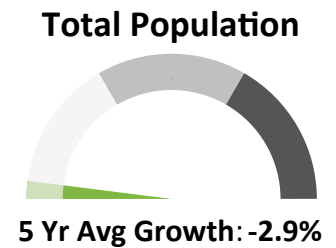
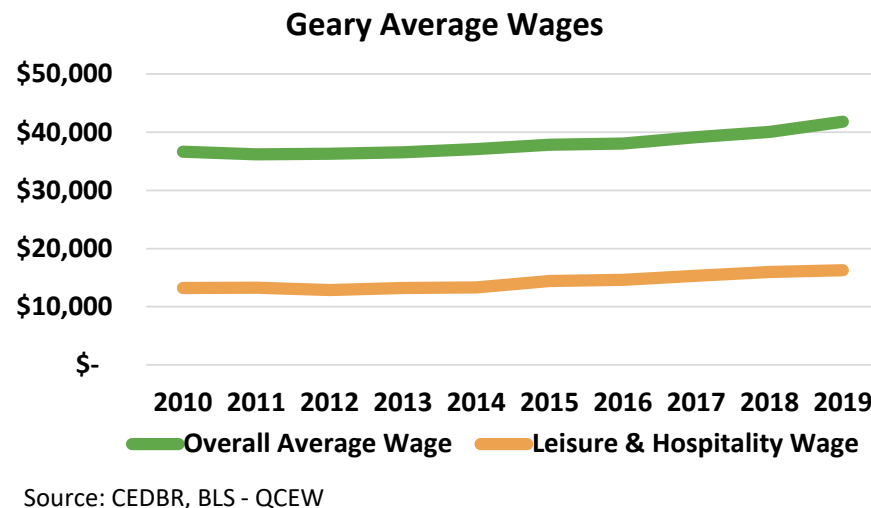
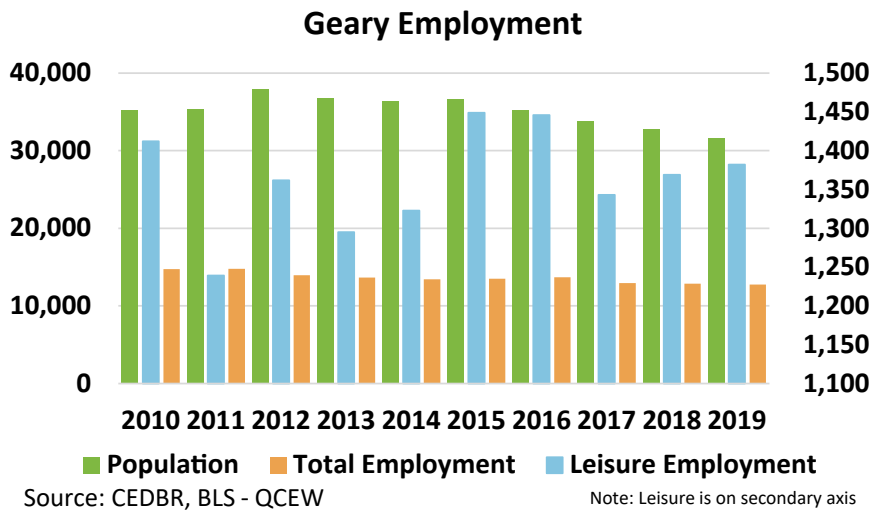
PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$5,573,355	\$2,624,138	\$4,894,243	\$2,205,735
Employment	250	76	212	64
Output	\$9,903,471	\$6,126,322	\$8,593,110	\$5,157,248

Source: CEDBR

Market Data

GEARY COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	32,594	31,670	-2.8%	-2.9%	26
Total Employment	12,860	12,750	-0.9%	-1.0%	18
Leisure & Hospitality Employment	1,369	1,382	0.9%	0.9%	8
Leisure & Hospitality Share	10.6%	10.8%	0.2%	1.9%	5
Average Annual Wage (All Industries)	\$40,043	\$41,802	4.4%	2.4%	15
Average Annual Wage (Leisure & Hosp)	\$15,959	\$16,251	1.8%	4.0%	4
L&H Employment Location Quotient	1.14	1.16	2.0%	1.3%	4

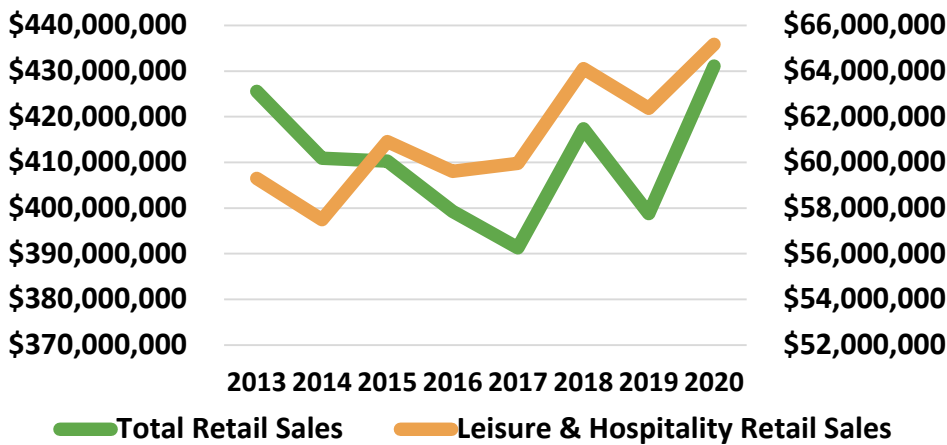
¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



GEARY COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$398,800,227	\$431,095,072	8.1%	1.0%	11
Leisure & Hospitality Retail Sales	\$62,373,348	\$65,168,557	4.5%	1.4%	11
Per Capita Retail Sales	\$12,235.39	\$13,612.10	11.3%	4.0%	3
Per Capita L&H Retail Sales	\$1,913.65	\$2,057.74	7.5%	4.4%	6
County Pull Factor (All Sales)	0.87	0.84	-3.8%	1.3%	1
County Pull Factor (L&H Sales)	0.98	1.23	25.9%	4.9%	6

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Geary Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)



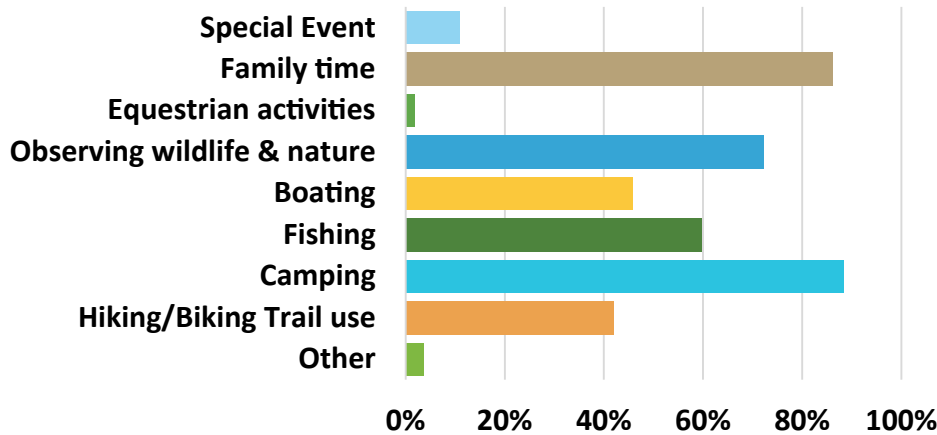
County Pull Factor (L&H)



The Milford Park market area experienced the fastest population decline of any Kansas state park market area from 2014 to 2019, losing 13.7 percent of its population in that time. During that time, the area’s leisure and hospitality grew 4.5 percent, leading to the fifth-fastest increase in hospitality employment concentration. The area had a high level of both leisure and hospitality average annual wages and per capita leisure and hospitality retail spending, ranking in the top three market areas for each. The area’s leisure and hospitality pull factor of 1.16 indicates the region had a level of hospitality retail sales above the state average in 2020.

Visitor Survey

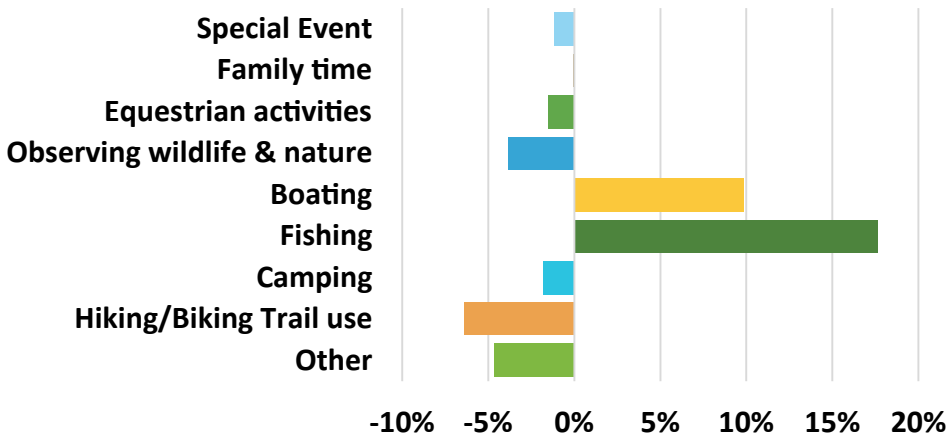
Park Visitor Activities



Milford State Park had one of the highest rates of fishing and boating activities among survey respondents, with 59.8 and 45.9 percent, respectively, of survey respondents engaging in those activities. The park's respondents involved in hiking and cycling activities at a rate of 6.4 percent lower than the statewide average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



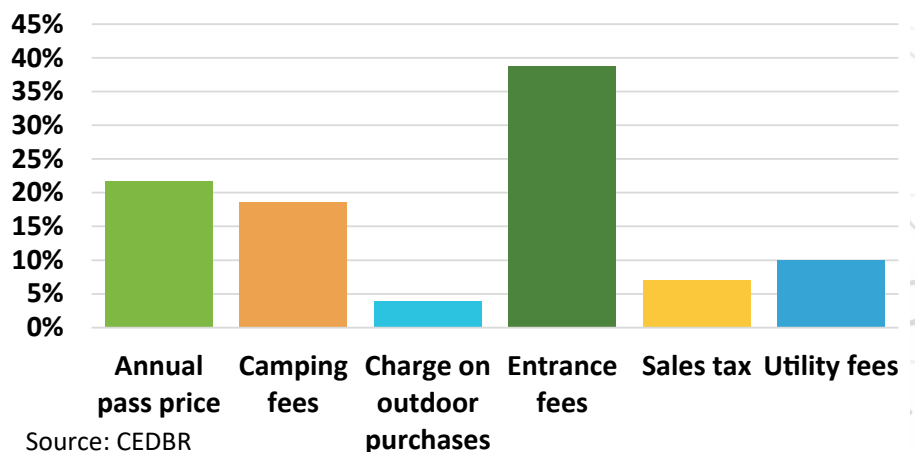
Support for increased fees to improve park services was 66.8 percent, and support for increasing entrance fees to the park was 9.1 percentage points higher than the state average.

Source: CEDBR

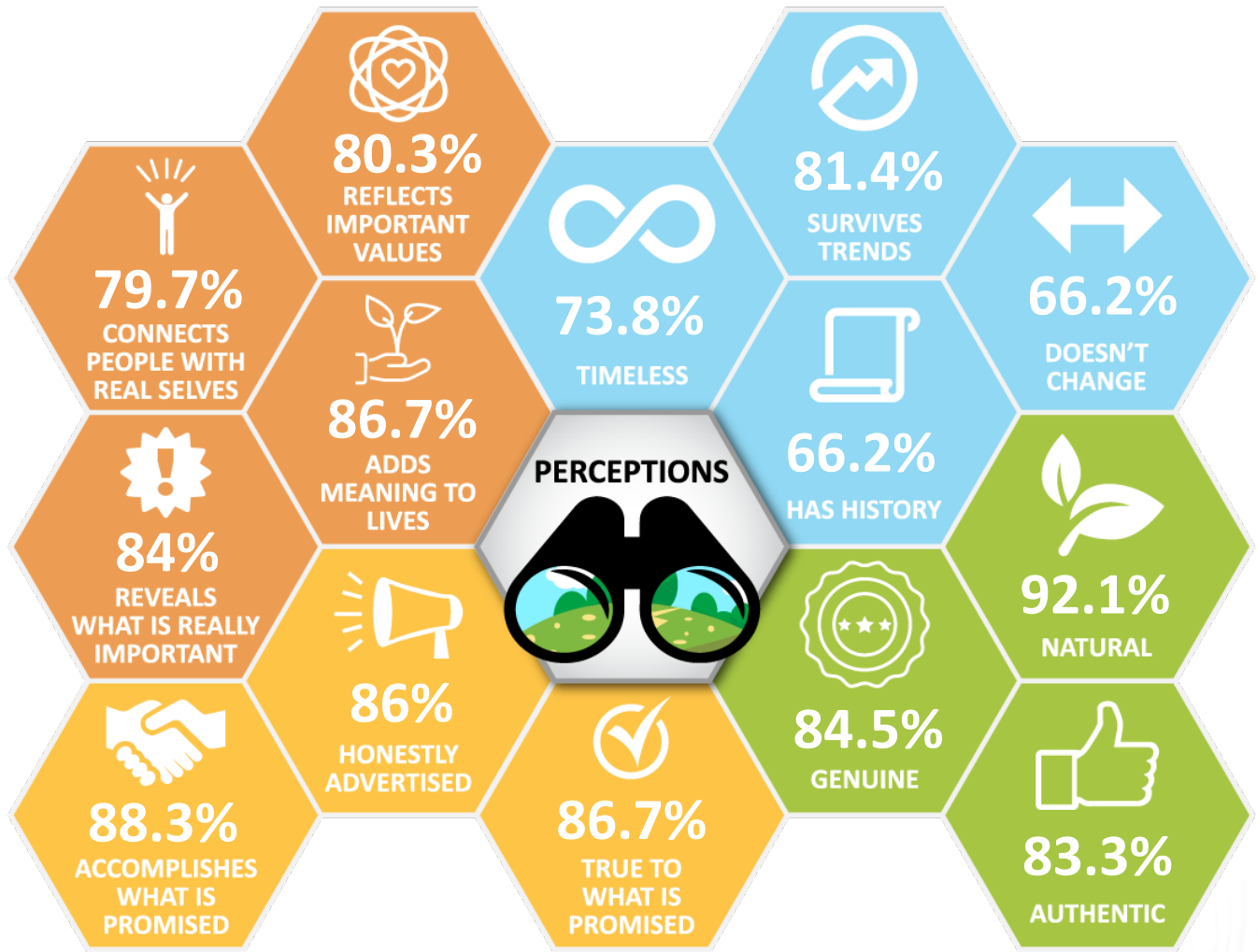
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



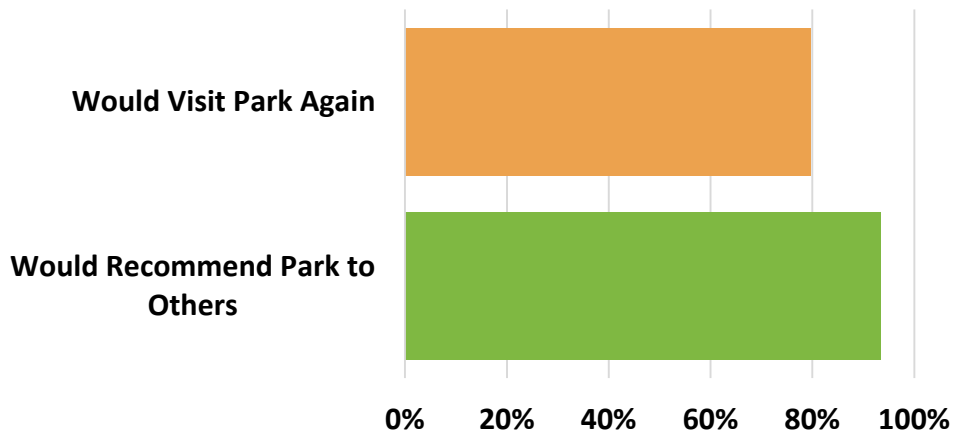
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 448
 Source: CEDBR survey 2020

More than 93 percent of survey respondents who visited Milford State Park would recommend it to other visitors, a rate 1.5 percentage points higher than the overall park system. Respondents' highest perceptions about the park were that it was natural, a place that accomplishes what it promises, and a place that adds meaning to people's lives, all of which it was rated above the state park average.

Park Visitor Satisfaction



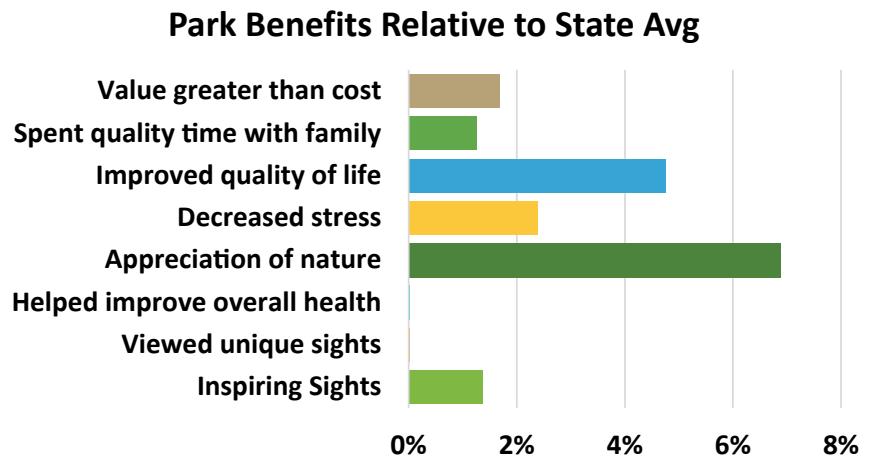
Source: CEDBR

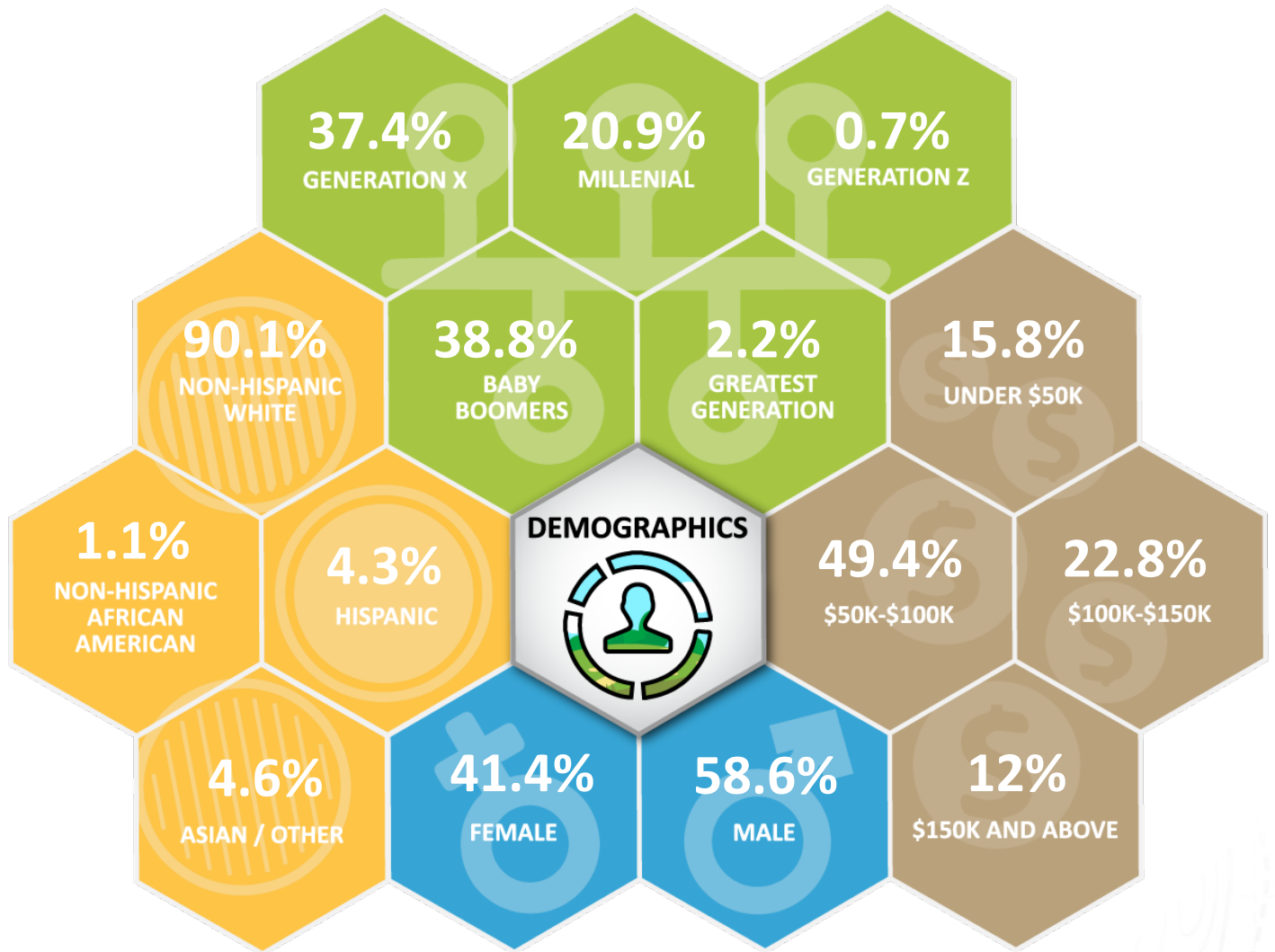


Survey respondents who visited Milford State Park had the third-highest rate of benefiting from appreciating nature of any Kansas state park, 6.9 percentage points above the state park system average. Respondents valued their visits more than their costs at a rate of 94.4 percent, the sixth-highest among Kansas state parks. The park rated at or above the state park average in every one of the seven benefit categories included in the survey and received its highest marks from the Baby Boomer generation.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	85%	87%	79%
Viewed unique sights	80%	86%	79%
Helped Improve Overall Health	66%	77%	67%
Appreciation of nature	80%	87%	81%
Decreased stress	90%	92%	88%
Improved Quality time with Family	83%	89%	86%
Spent quality time with family	88%	95%	95%
Value greater than cost	96%	92%	95%

Source: CEDBR

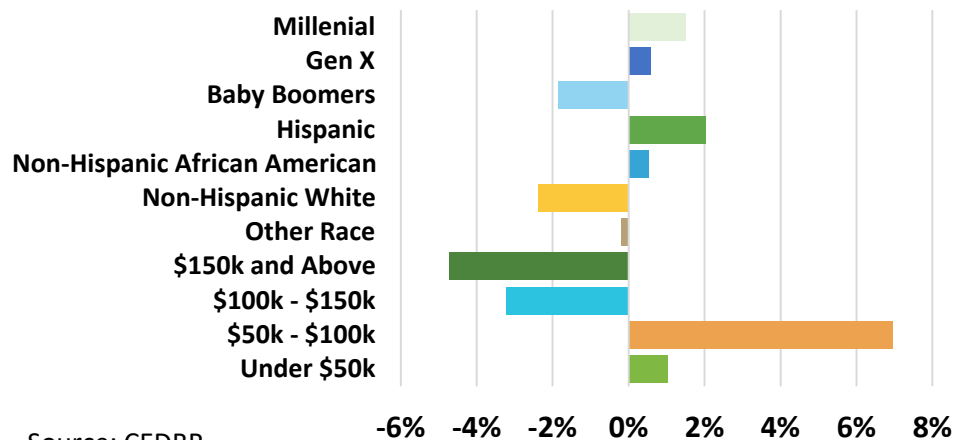




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

With 9.9 percent of the survey respondents who visited Milford State Park identifying as people of color, the park had the third-highest share of any Kansas state park. The park had the highest share of Hispanic respondents, at 4.3 percent, and the third-highest share of non-Hispanic African American respondents, at 1.1 percent. The park's respondents tended to be younger than those for the overall park system, with an average age of 0.9 years younger and a higher share of Millennials than average.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

PERRY STATE PARK | JEFFERSON COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$180,619	\$3,080,698	\$400,475	\$3,661,792
EMPLOYMENT	6	165	10	182
OUTPUT	\$128,212	\$7,246,320	\$1,547,451	\$8,921,982

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$1,756	-	\$11,023
Mining		\$5,510	0	\$65,431
Construction		\$23,389	0	\$72,506
Manufacturing		\$15,053	0	\$213,197
TIPU		\$211,425	5	\$1,293,362
Trade		\$1,955,021	125	\$2,960,294
Service		\$1,393,634	50	\$4,185,313
Government		\$56,004	1	\$120,855
Total		\$3,661,792	182	\$8,921,982

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$666,669	\$1,005,219	\$92,872	\$76,680	\$8,724
2020	\$616,199	\$929,228	\$85,851	\$71,044	\$8,107

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,296,487	\$1,365,307	\$2,200,232	\$1,263,147
Employment	143	39	133	35
Output	\$5,601,753	\$3,320,230	\$5,263,938	\$3,073,787

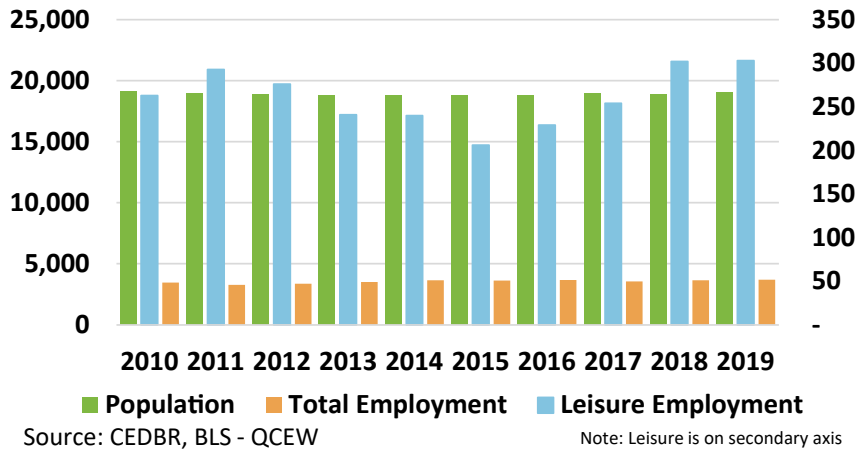
Source: CEDBR

Market Data

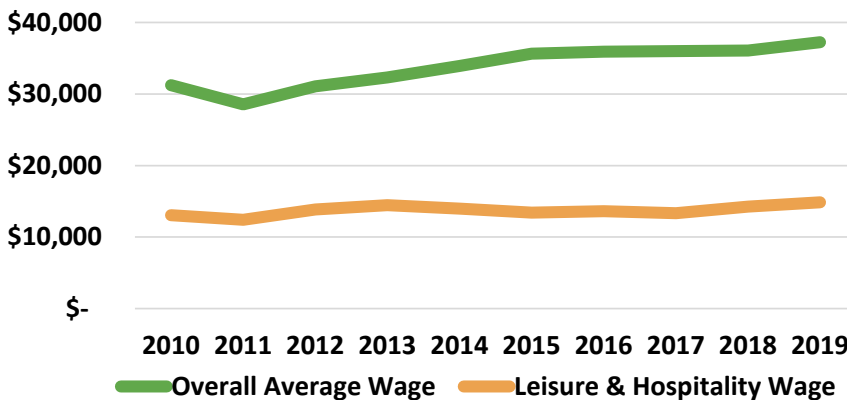
JEFFERSON COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	18,975	19,043	0.4%	0.2%	6
Total Employment	3,655	3,693	1.0%	0.3%	9
Leisure & Hospitality Employment	302	303	0.3%	4.8%	2
Leisure & Hospitality Share	8.3%	8.2%	-0.1%	4.5%	2
Average Annual Wage (All Industries)	\$36,098	\$37,269	3.2%	1.9%	18
Average Annual Wage (Leisure & Hosp)	\$14,266	\$14,855	4.1%	1.2%	22
L&H Employment Location Quotient	0.88	0.88	-0.5%	3.8%	2

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Jefferson Employment



Jefferson Average Wages



Total Population



Leisure Employment



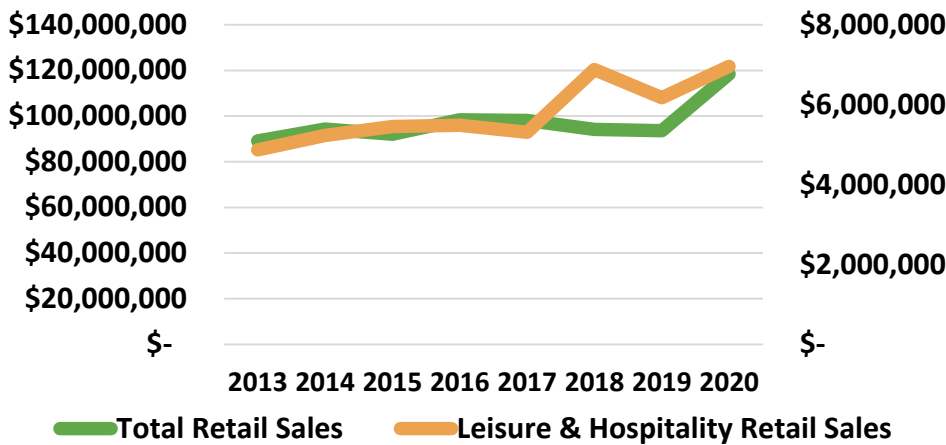
Average Leisure Wages



JEFFERSON COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$93,591,649	\$118,374,711	26.5%	5.2%	2
Leisure & Hospitality Retail Sales	\$6,175,357	\$6,958,238	12.7%	5.0%	3
Per Capita Retail Sales	\$4,932.37	\$6,216.18	26.0%	5.0%	2
Per Capita L&H Retail Sales	\$325.45	\$365.40	12.3%	4.8%	5
County Pull Factor (All Sales)	0.34	0.33	-3.2%	-1.4%	16
County Pull Factor (L&H Sales)	0.17	0.22	31.4%	5.3%	5

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Jefferson Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Perry Park’s market area had the second-fastest-growing leisure and hospitality employment from 2014 to 2019 of any Kansas market area, adding more than 60 workers, though the area’s concentration of hospitality workers remained below the state average. The area’s average annual hospitality wages of \$14,855 in 2019 were the seventh-highest among parks. Its per capita hospitality retail sales grew at the third-fastest rate, increasing 26.4 percent since 2015. Still, they remained the lowest among Kansas market areas at less than a quarter of the state’s per person average.

Total Taxable Retail Sales



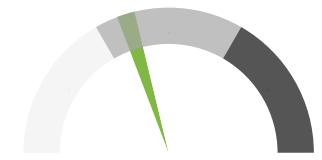
5 Yr Avg Growth: 5.2%

Leisure Retail Sales



5 Yr Avg Growth: 5.0%

County Pull Factor (All)



5 Yr Avg Growth: -1.4%

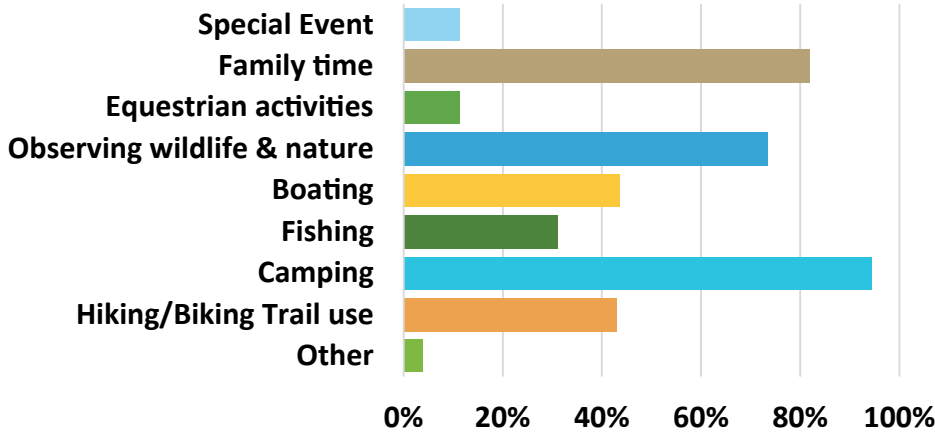
County Pull Factor (L&H)



5 Yr Avg Growth: 5.3%

Visitor Survey

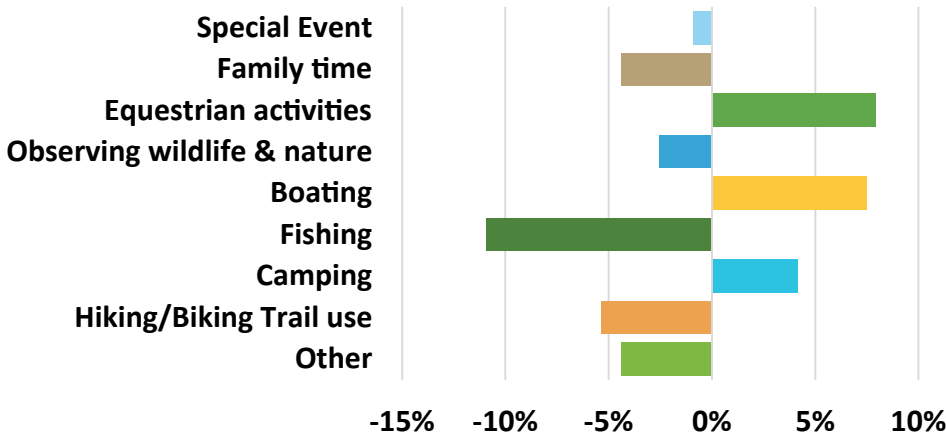
Park Visitor Activities



Source: CEDBR

Survey respondents at Perry State Park engaged in equestrian activities at the highest rate of any state park, 11.3 percent, which was more than triple the state park system average.

Park Visitor Activities Relative to State Avg



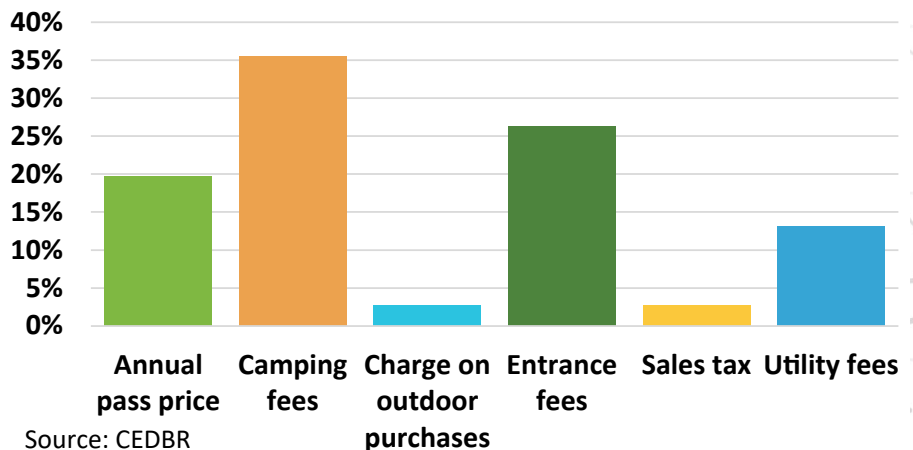
Source: CEDBR

The park was also the only park with survey respondents who reported a significantly higher level of boating activities than fishing activities, 43.5 percent compared to 31.1 percent. Camping was the most popular activity at the park, with 94.4 percent participation among respondents.

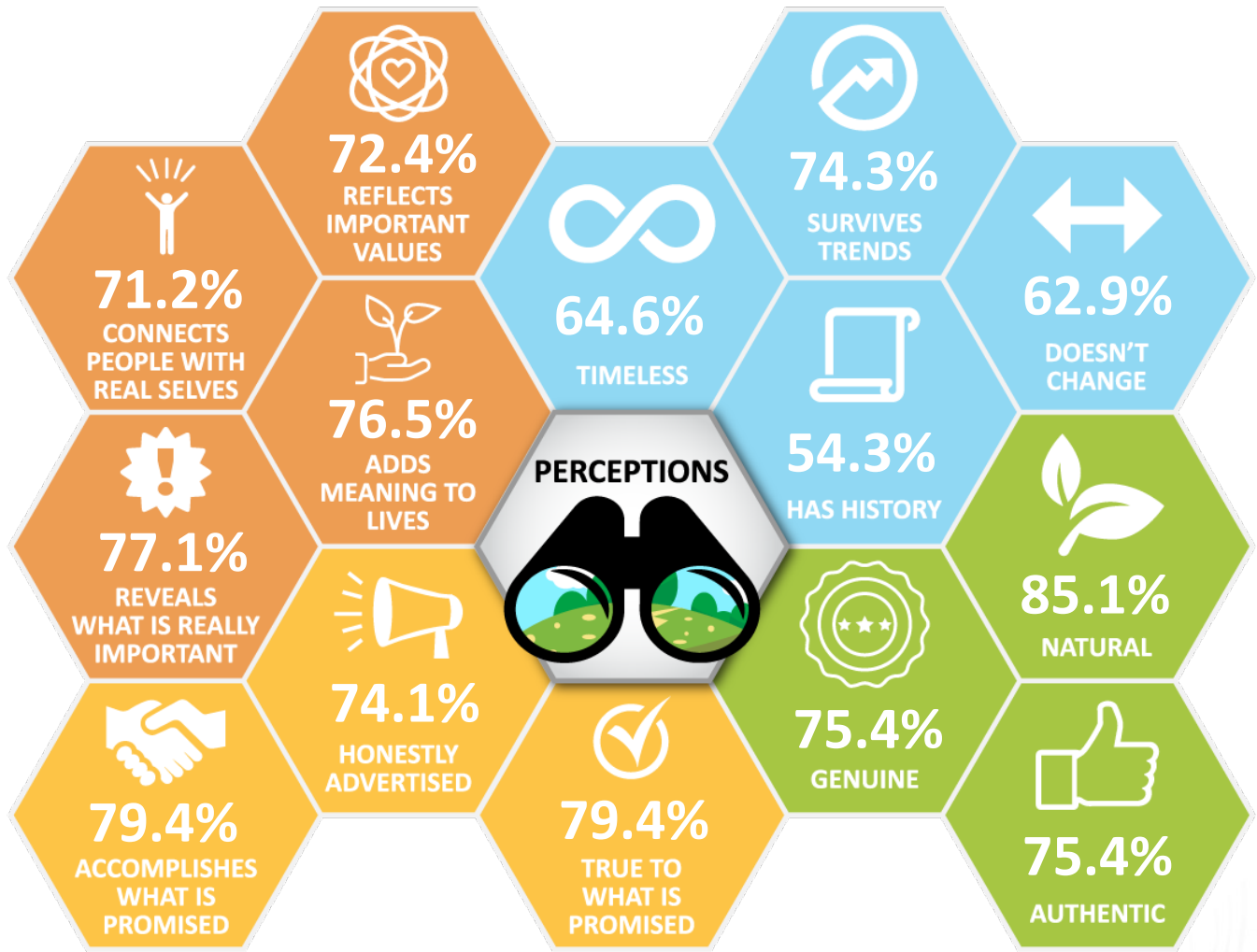
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



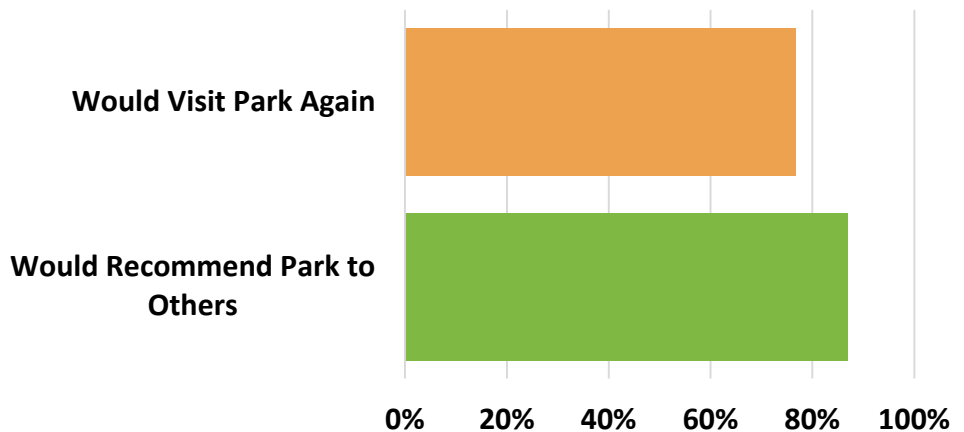
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 254
 Source: CEDBR survey 2020

A large majority of respondents were satisfied with their trips to Perry State Park, with 76.8 percent likely to revisit the park. Even with 86.9 percent of survey respondents likely to recommend Perry State Park to other visitors, the park received the second-lowest level of recommendation of any Kansas state park, a rate 5 percentage points below average. Perry rated lower than the state park average in all 14 perception categories, with an average gap of 6.5 percentage points, the largest in the park being a place with history.

Park Visitor Satisfaction



Source: CEDBR



*Values indicate somewhat to strongly agree
 **Value exceeds or equals cost
 Source: CEDBR survey 2020

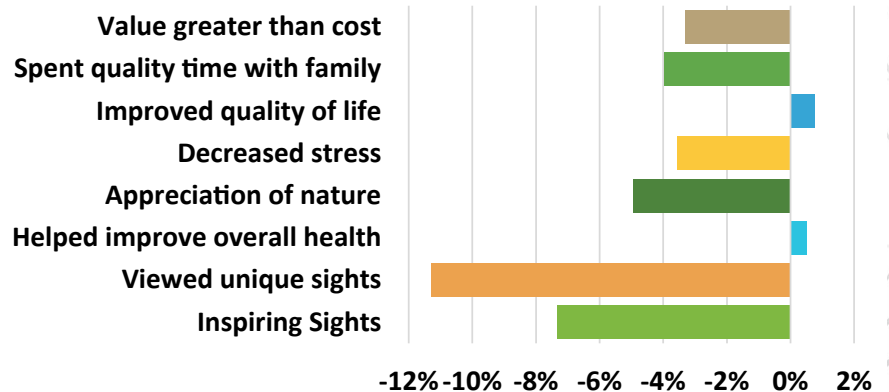
With 89.4 percent of survey respondents who visited Perry State Park reporting that they received a value higher from their visit than the cost, the park ranked third lowest for visitor satisfaction in the survey. The park rated 11.3 percentage points below the state average in benefits from viewing unique sights, the lowest in the state park system, but it did rate 0.8 percentage points above average in improving quality of life. The most common benefits respondents cited for the park were spending quality time with family and decreased stress with their visit.

PERSONAL BENEFITS BY GENERATION

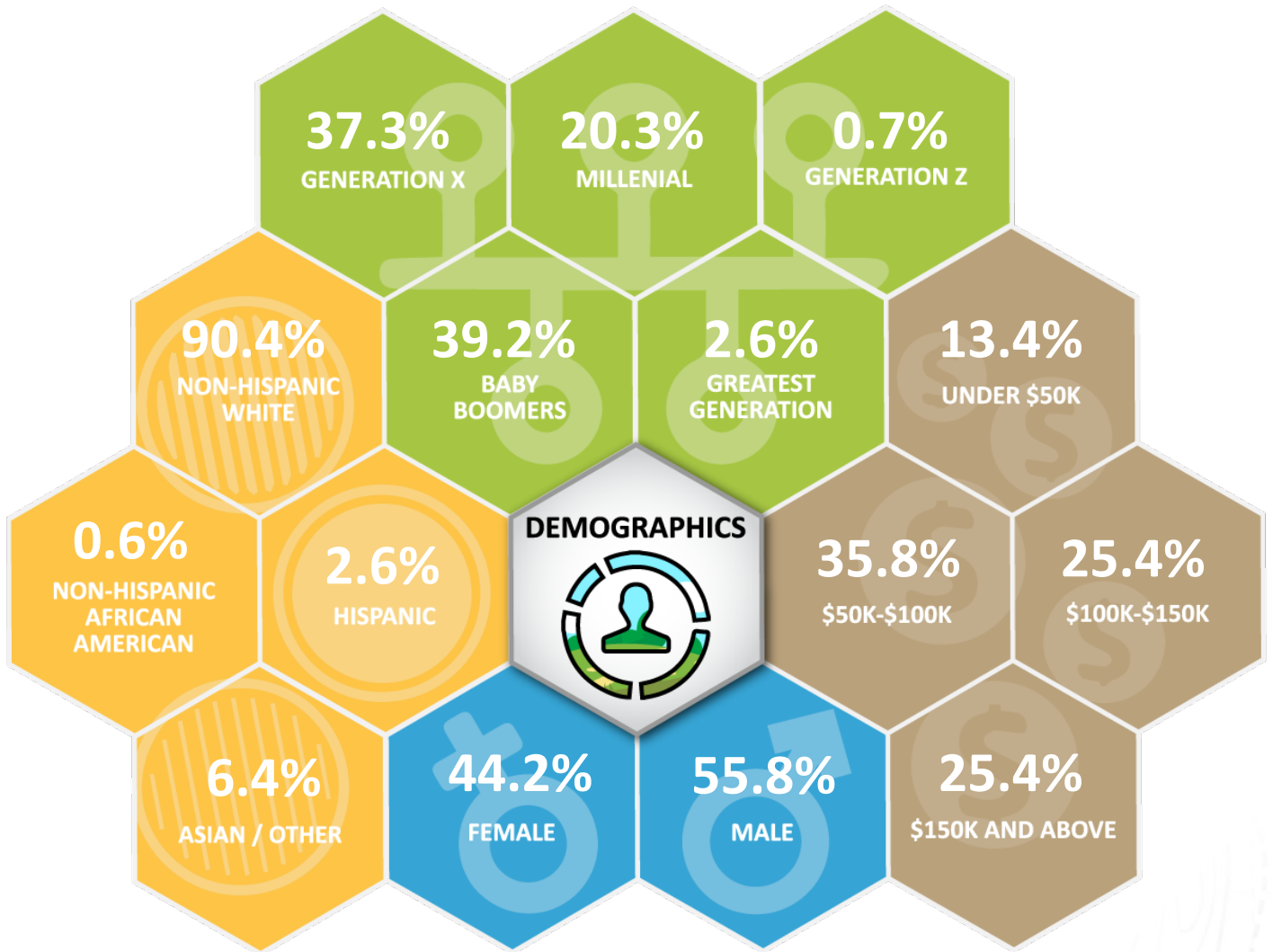
PERSONAL BENEFIT	B	X	M
Inspiring sights	78%	75%	65%
Viewed unique sights	72%	70%	65%
Helped Improve Overall Health	80%	68%	65%
Appreciation of nature	82%	68%	65%
Decreased stress	88%	86%	81%
Improved Quality time with Family	88%	82%	81%
Spent quality time with family	93%	84%	81%
Value greater than cost	92%	91%	84%

Source: CEDBR

Park Benefits Relative to State Avg



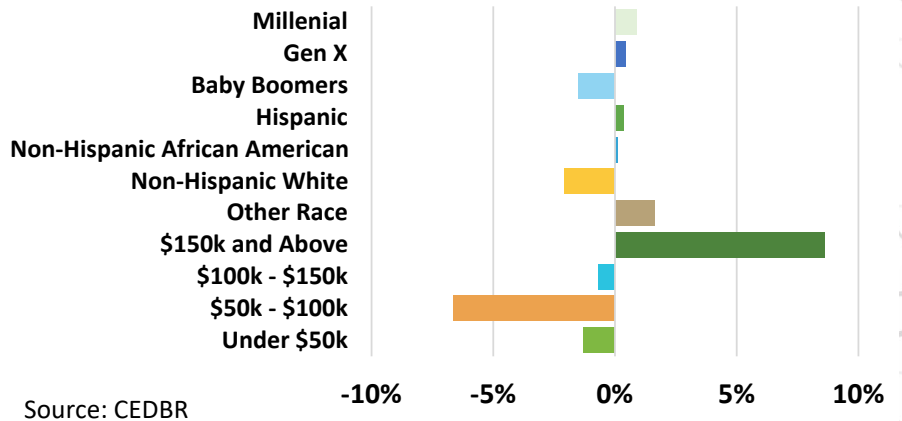
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Perry State Park had some of the highest incomes of any Kansas state park, with 50.7 percent of respondents earning more than \$100,000 and 25.4 percent earning more than \$150,000. The park's share of respondents identified as people of color was 2.1 percentage points greater than the overall park system's, the fourth highest in the state. The age distribution of visitors to the park was representative of the overall park system, with similar shares of Baby Boomers, Generation X, and Millennials, though the average age was 0.7 years younger than average.

Park Visitor Demographics Relative to State Avg



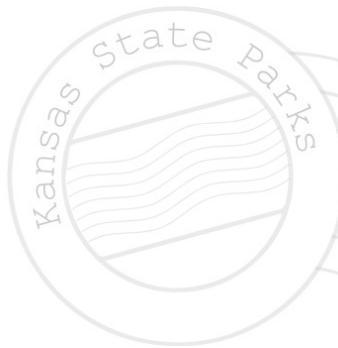
Source: CEDBR

POMONA STATE PARK | OSAGE COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$187,788	\$1,776,989	\$235,189	\$2,199,966
EMPLOYMENT	4	83	6	93
OUTPUT	\$130,444	\$3,738,366	\$916,920	\$4,785,736

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture 		\$988	-	\$5,569
Mining 		\$2,247	-	\$36,491
Construction 		\$9,731	-	\$34,943
Manufacturing 		\$9,186	-	\$116,743
TIPU 		\$116,716	3	\$696,420
Trade 		\$1,096,774	63	\$1,557,130
Service 		\$928,524	27	\$2,249,387
Government 		\$35,799	0	\$89,055
Total		\$2,199,966	93	\$4,785,736

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$411,109	\$457,769	\$46,141	\$41,983	\$4,572
2020	\$675,433	\$751,966	\$75,798	\$68,523	\$7,393

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,454,184	\$745,782	\$2,216,263	\$1,222,042
Employment	73	20	115	34
Output	\$2,951,144	\$1,834,590	\$4,599,217	\$3,001,244

Source: CEDBR

Market Data

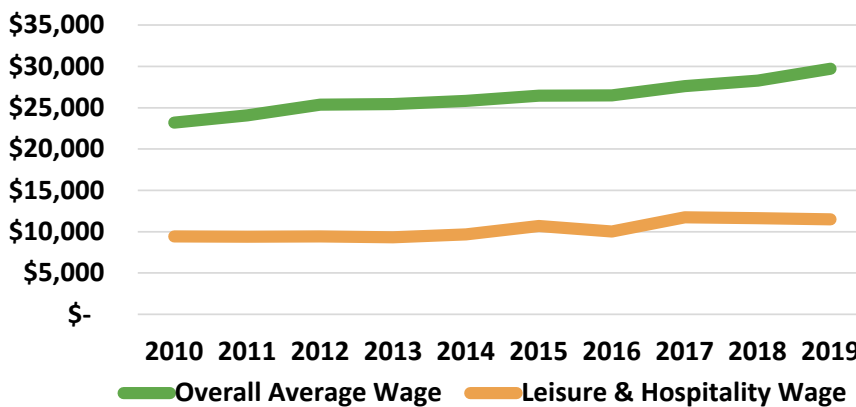
OSAGE COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	15,941	15,949	0.1%	0.0%	7
Total Employment	2,807	2,799	-0.3%	-0.5%	16
Leisure & Hospitality Employment	166	173	4.2%	-1.2%	16
Leisure & Hospitality Share	5.9%	6.2%	0.3%	-0.7%	19
Average Annual Wage (All Industries)	\$28,289	\$29,718	5.1%	2.8%	5
Average Annual Wage (Leisure & Hosp)	\$11,632	\$11,490	-1.2%	3.5%	7
L&H Employment Location Quotient	0.63	0.66	4.7%	-1.3%	16

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Osage Employment



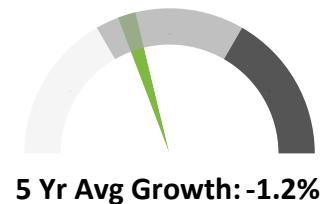
Osage Average Wages



Total Population



Leisure Employment

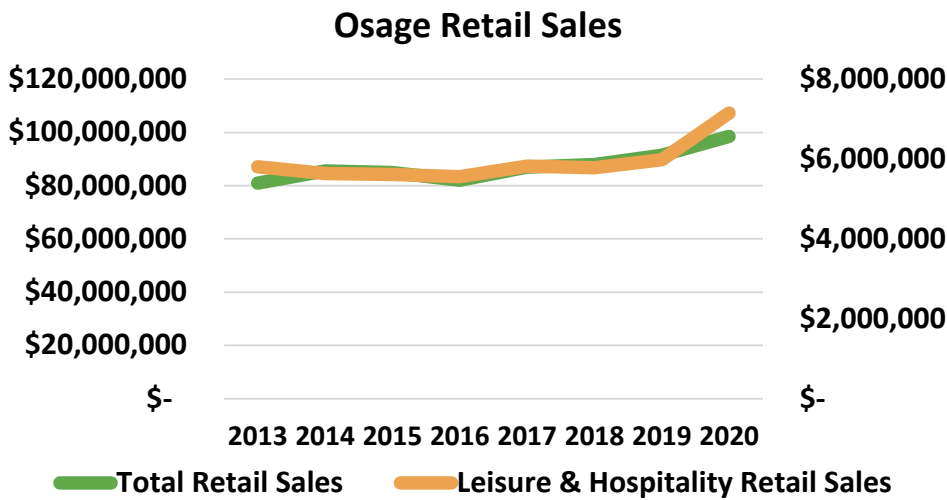


Average Leisure Wages



OSAGE COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$91,375,747	\$98,550,706	7.9%	3.0%	5
Leisure & Hospitality Retail Sales	\$5,980,520	\$7,154,442	19.6%	5.0%	4
Per Capita Retail Sales	\$5,732.12	\$6,179.12	7.8%	3.0%	5
Per Capita L&H Retail Sales	\$375.17	\$448.58	19.6%	4.9%	4
County Pull Factor (All Sales)	0.38	0.38	1.5%	0.2%	7
County Pull Factor (L&H Sales)	0.19	0.27	40.0%	5.5%	4

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Pomona Park’s market area was one of only seven Kansas state park market areas to increase in population from 2014 to 2019, though total employment did decline by 2.5 percent, a decrease of almost 100 workers. Average annual wages in the area grew more than 2 percent faster than the state average in the past five years, as did average annual leisure and hospitality wages. While the region had the lowest level of retail spending per capita among park market areas, spending growth was more than triple the state average in the past five years, with hospitality spending per capita growing 5 percent faster than the state average annually.

Total Taxable Retail Sales



5 Yr Avg Growth: 3.0%

Leisure Retail Sales



5 Yr Avg Growth: 5.0%

County Pull Factor (All)



5 Yr Avg Growth: 0.2%

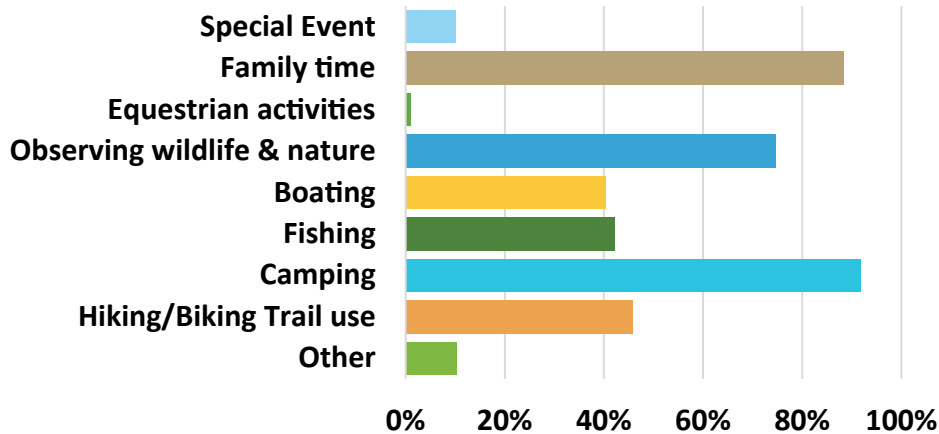
County Pull Factor (L&H)



5 Yr Avg Growth: 5.5%

Visitor Survey

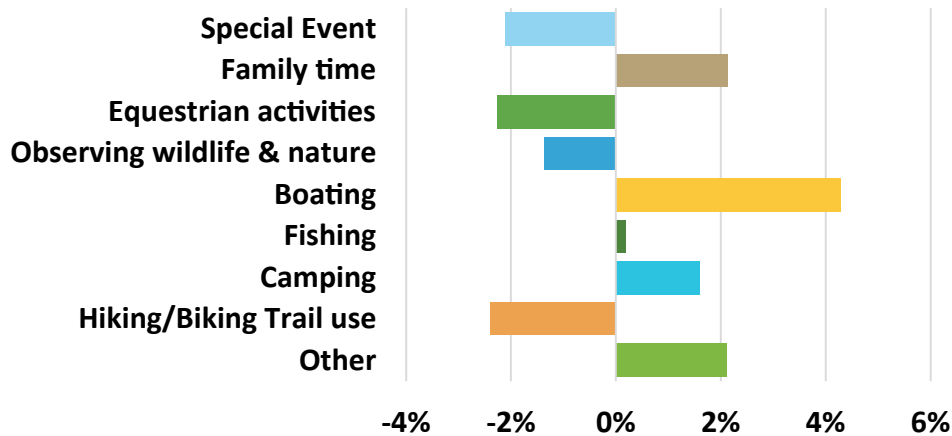
Park Visitor Activities



Camping and family time were the two most popular activities reported by survey respondents who visited Pomona State Park. The activity with the largest gap relative to the state park system average was boating, which was engaged in by respondents at Pomona State Park 4.3 percentage points more frequently than the state average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



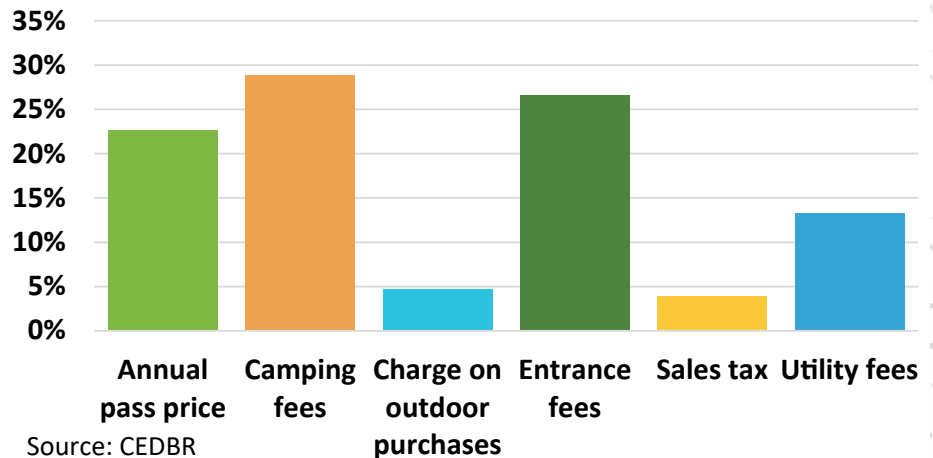
More than 67 percent of park respondents supported increasing fees to improve park services, with relatively equal support for increases to annual park passes, camping fees, and entrance fees.

Source: CEDBR

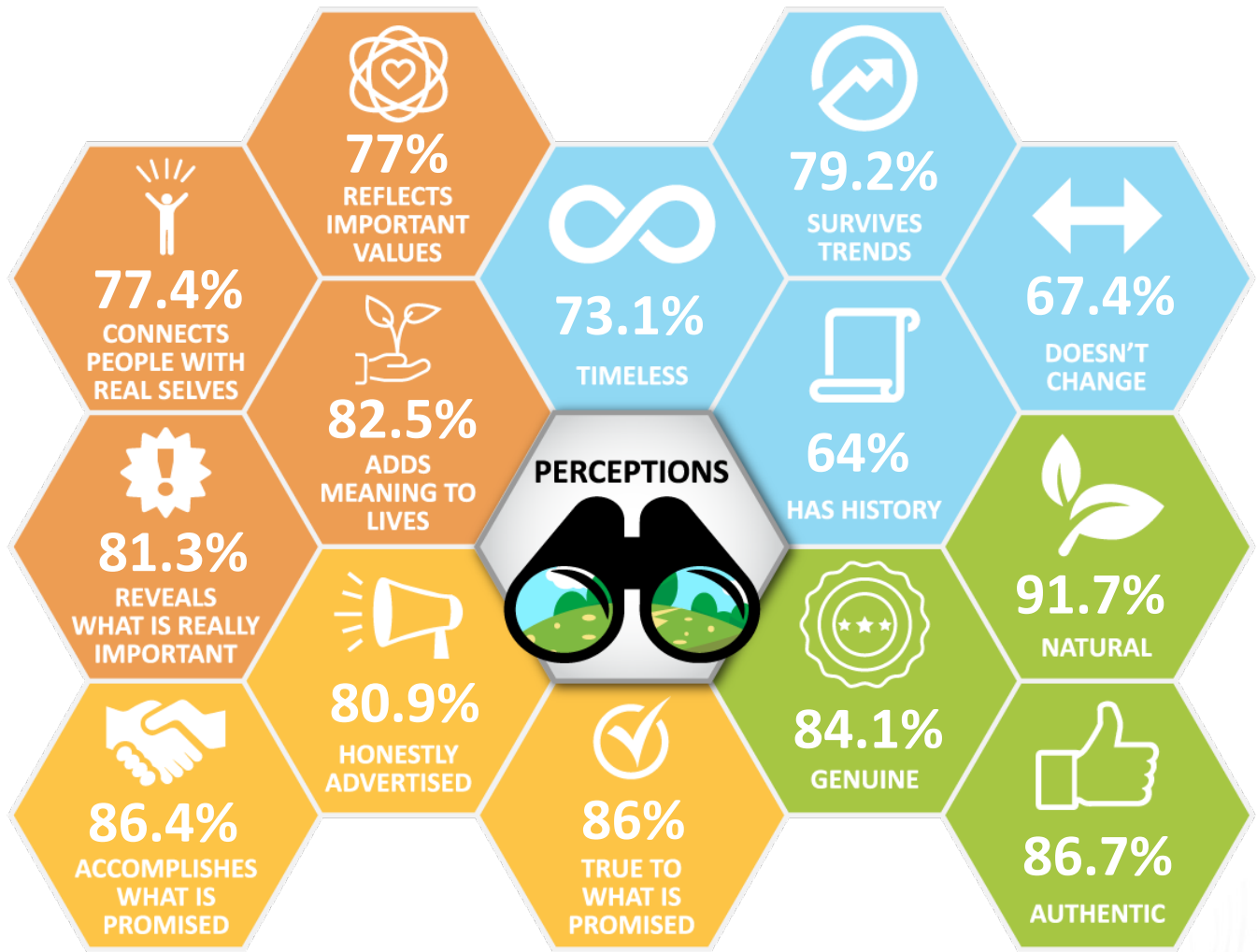
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



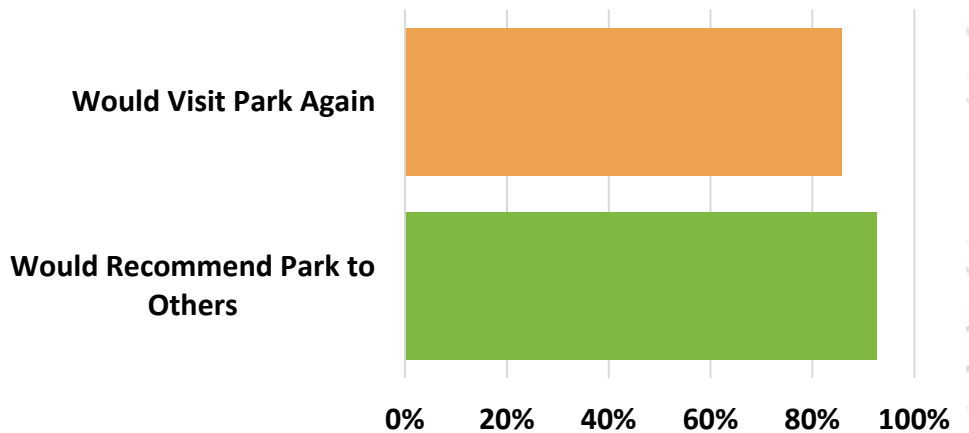
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 383
 Source: CEDBR survey 2020

Among survey respondents who visited Pomona State Park, 92.6 percent would recommend the park to others, a rate 0.7 percentage points higher than the average state park, and 85.8 percent were likely to revisit the park. Respondents had perceptions of the park largely similar to the average for the Kansas state park system. Still, the perception of being authentic stood out with a rate of agreement 4.7 percentage points higher than average.

Park Visitor Satisfaction



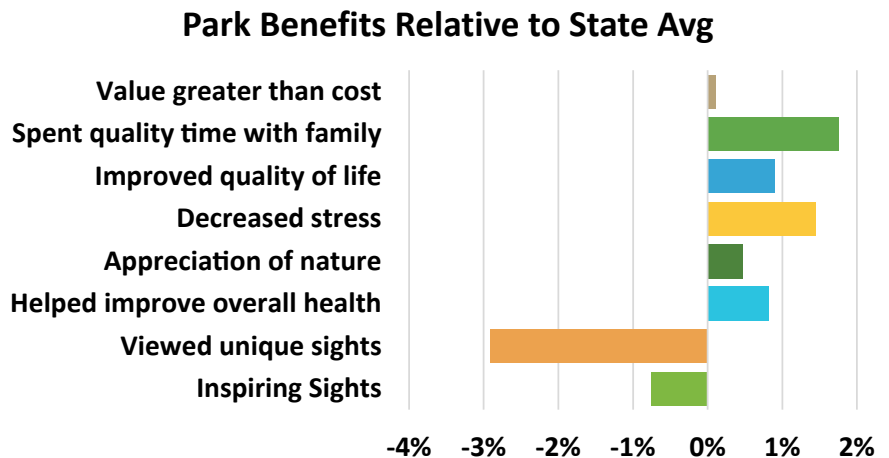
Source: CEDBR

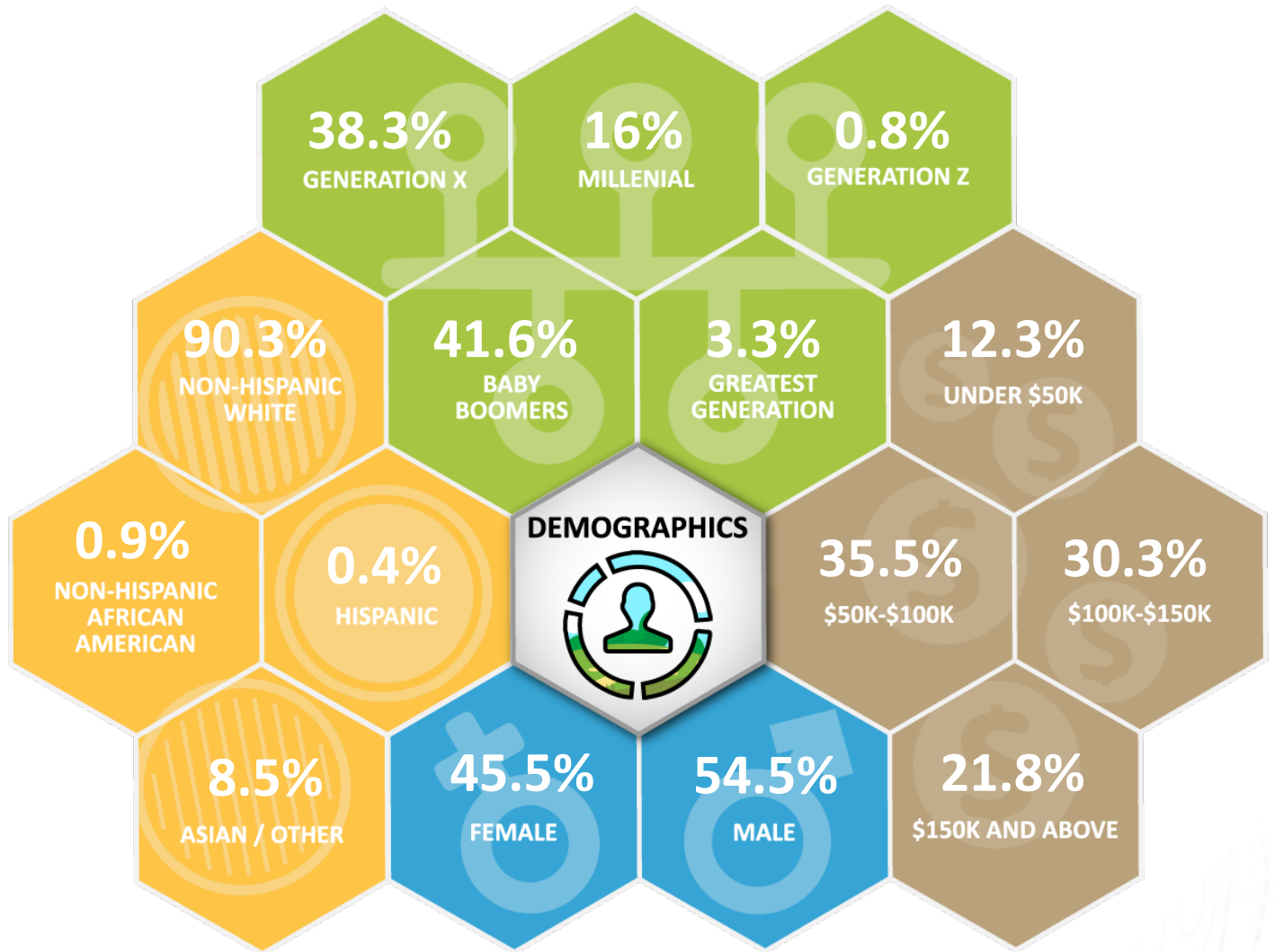


Survey respondents who visited Pomona State Park gave the park above-average marks in five of the seven benefit categories on the survey, ranging from 0.5 to 1.8 percentage points greater than the state park system average. The only two categories to rate below the state average were viewing inspiring sights and unique sights, which were 0.8 percentage points and 2.8 percentage points below average, respectively. Trips to the park were valued more than their cost by 92.8 percent of respondents.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	80%	83%	85%
Viewed unique sights	75%	78%	87%
Helped Improve Overall Health	67%	72%	77%
Appreciation of nature	74%	78%	77%
Decreased stress	88%	92%	92%
Improved Quality time with Family	79%	87%	85%
Spent quality time with family	93%	94%	95%
Value greater than cost	92%	94%	92%

Source: CEDBR

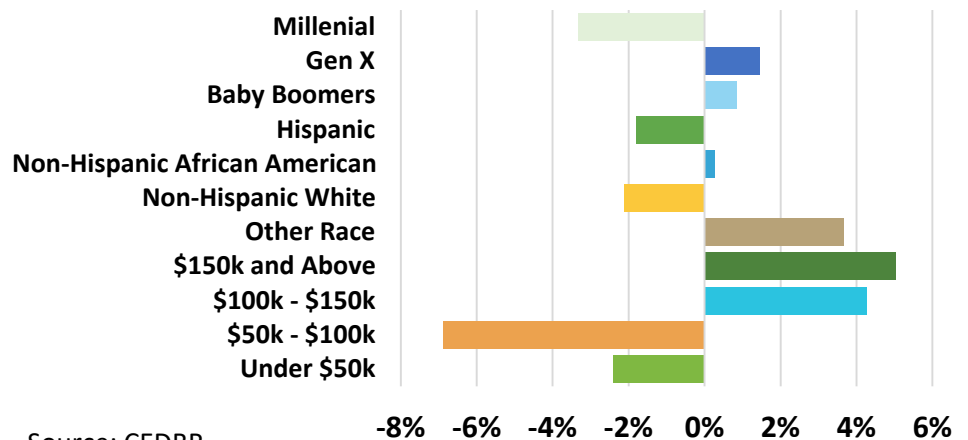




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Pomona State Park had the third-highest share of any Kansas state park of survey respondents who visited the park identified as people of color, 9.7 percent. Respondents had above-average incomes, with 52.1 percent earning \$100,000 or more annually. Visitors to the park tended to skew older than the overall park system, as both the Baby Boomer and Generation X cohorts were overrepresented. In contrast, the park's share of Millennials was 3.4 percentage points lower than average.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

PRAIRIE DOG STATE PARK | NORTON COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$147,285	\$3,034,906	\$598,063	\$3,780,252
EMPLOYMENT	4	124	15	143
OUTPUT	\$81,233	\$6,614,082	\$2,193,842	\$8,889,150

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$1,813	-	\$13,380
Mining		\$9,313	0	\$111,752
Construction		\$18,657	0	\$73,150
Manufacturing		\$17,978	0	\$227,702
TIPU		\$293,054	5	\$1,542,819
Trade		\$1,853,841	94	\$2,520,887
Service		\$1,484,658	42	\$4,160,045
Government		\$100,937	1	\$239,415
Total		\$3,780,252	143	\$8,889,150

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$706,077	\$601,234	\$47,394	\$79,746	\$10,474
2020	\$928,683	\$790,789	\$62,328	\$104,819	\$13,772

Source: CEDBR

PARK - REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$2,300,107	\$1,480,143	\$2,956,612	\$1,946,036
Employment	105	38	136	50
Output	\$4,956,241	\$3,932,911	\$6,493,241	\$5,170,313

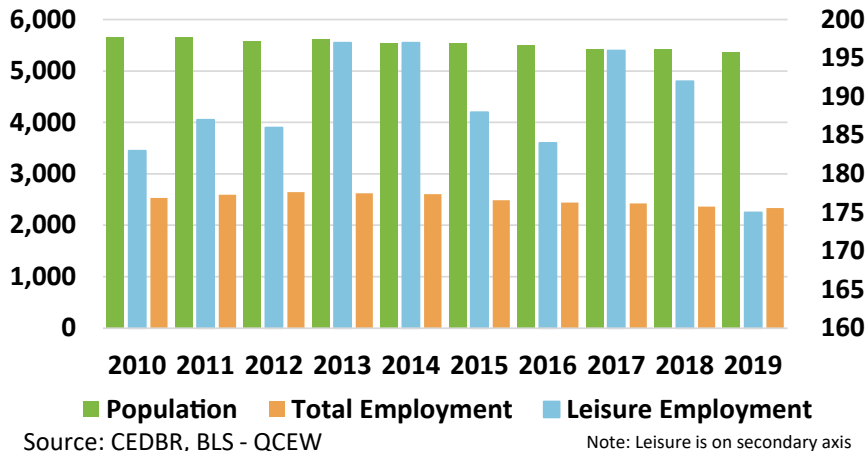
Source: CEDBR

Market Data

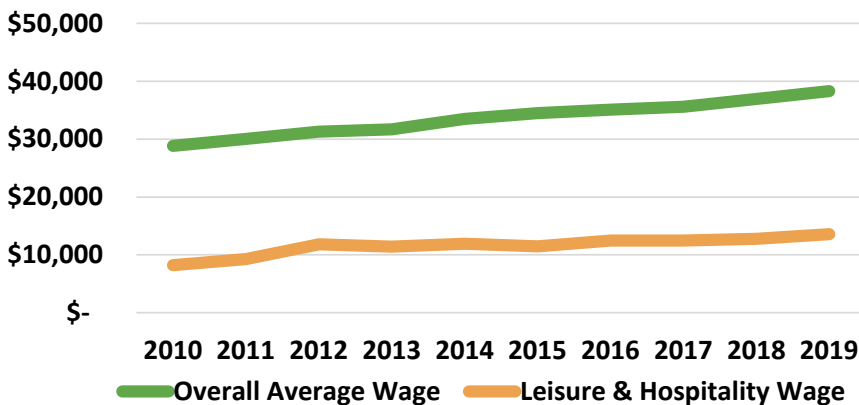
NORTON COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	4,582	4,547	-0.8%	-0.7%	16
Total Employment	2,364	2,332	-1.4%	-2.2%	21
Leisure & Hospitality Employment	192	175	-8.9%	-2.3%	19
Leisure & Hospitality Share	8.1%	7.5%	-0.6%	-0.1%	17
Average Annual Wage (All Industries)	\$36,959	\$38,289	3.6%	2.7%	8
Average Annual Wage (Leisure & Hosp)	\$12,770	\$13,569	6.3%	2.6%	14
L&H Employment Location Quotient	0.87	0.80	-7.5%	-0.8%	14

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

Norton Employment



Norton Average Wages



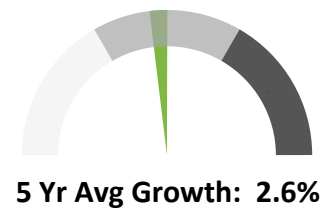
Total Population



Leisure Employment



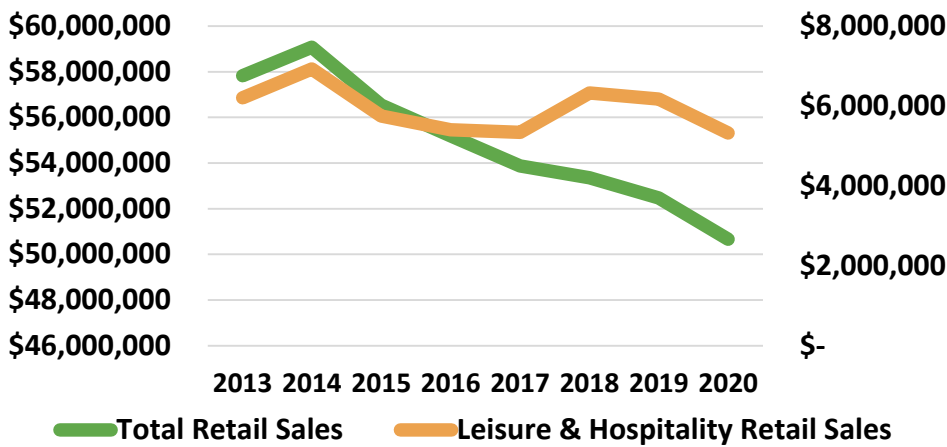
Average Leisure Wages



NORTON COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$52,470,464	\$50,660,075	-3.5%	-2.2%	23
Leisure & Hospitality Retail Sales	\$6,170,832	\$5,325,721	-13.7%	-1.5%	23
Per Capita Retail Sales	\$11,451.43	\$11,141.43	-2.7%	-1.4%	23
Per Capita L&H Retail Sales	\$1,346.76	\$1,171.26	-13.0%	-0.8%	22
County Pull Factor (All Sales)	0.79	0.77	-3.1%	-2.7%	22
County Pull Factor (L&H Sales)	0.69	0.70	1.8%	-0.3%	22

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Norton Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: -2.2%



5 Yr Avg Growth: -1.5%

County Pull Factor (All)



5 Yr Avg Growth: -2.7%

County Pull Factor (L&H)

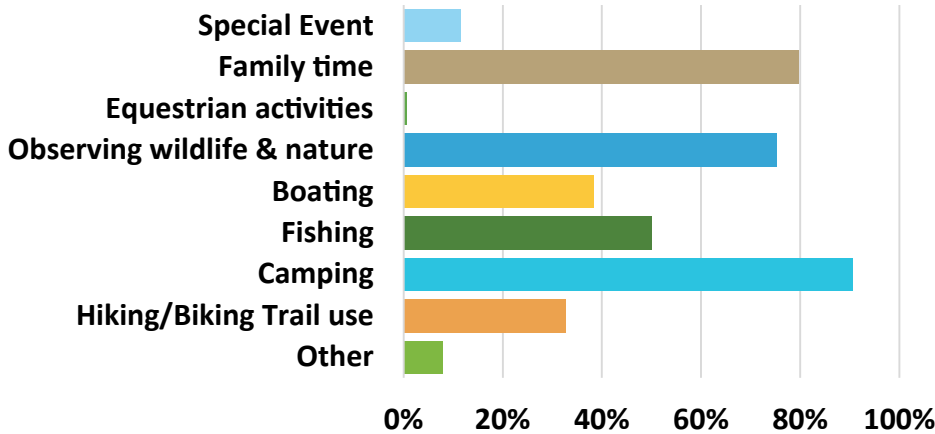


5 Yr Avg Growth: -0.3%

The market area for Prairie Dog Park declined in both population and employment from 2014 to 2019, contracting by 3.7 and 10.5 percent, respectively. Average annual wages continued to exhibit strong growth, increasing 2.3 percent faster than the state average in the past five years, while leisure and hospitality wages rose 13.8 percent. The area's leisure and hospitality pull factor remained relatively flat in recent years, suggesting the area's hospitality retail sales have kept pace with overall state growth in the sector.

Visitor Survey

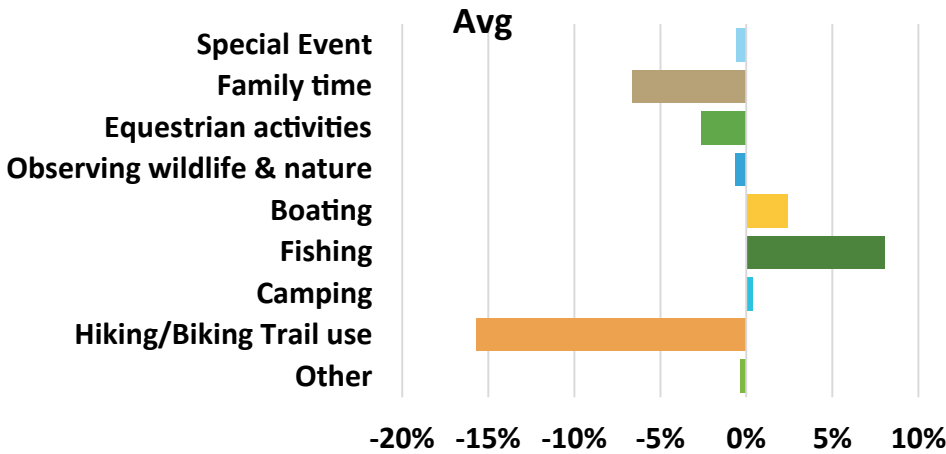
Park Visitor Activities



Source: CEDBR

Survey respondents who visited Prairie Dog State Park were 8 percentage points more likely to engage in fishing activities than the state park system average. However, they were only 2.4 percentage points more likely to engage in boating activities.

Park Visitor Activities Relative to State



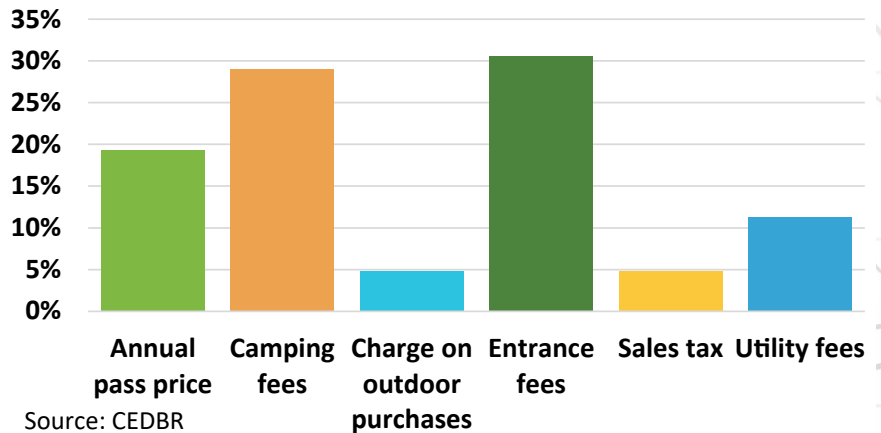
Source: CEDBR

Respondents engaged in hiking activities at a rate 15.7 percentage points lower than average, one of the lowest levels among Kansas' state parks.

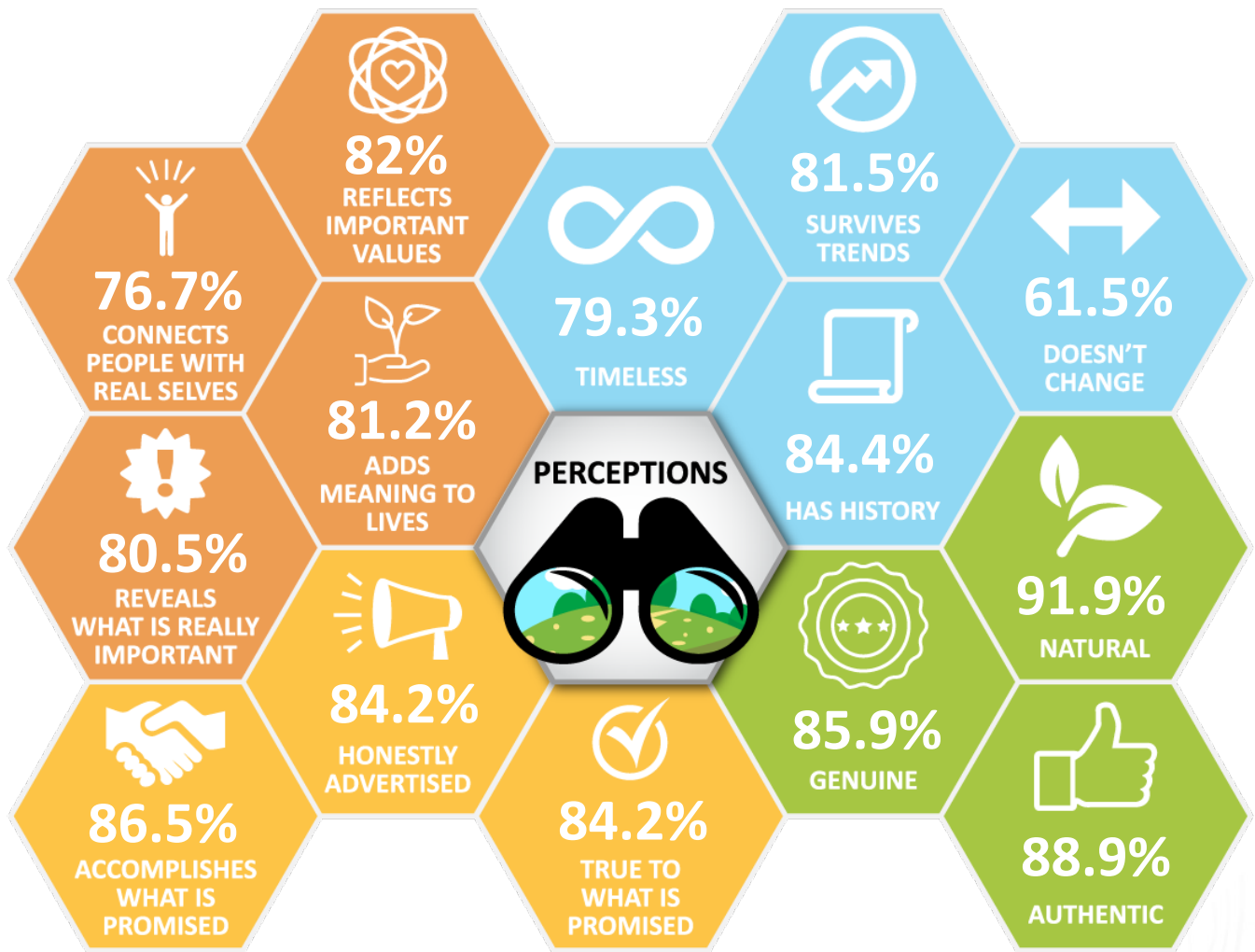
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



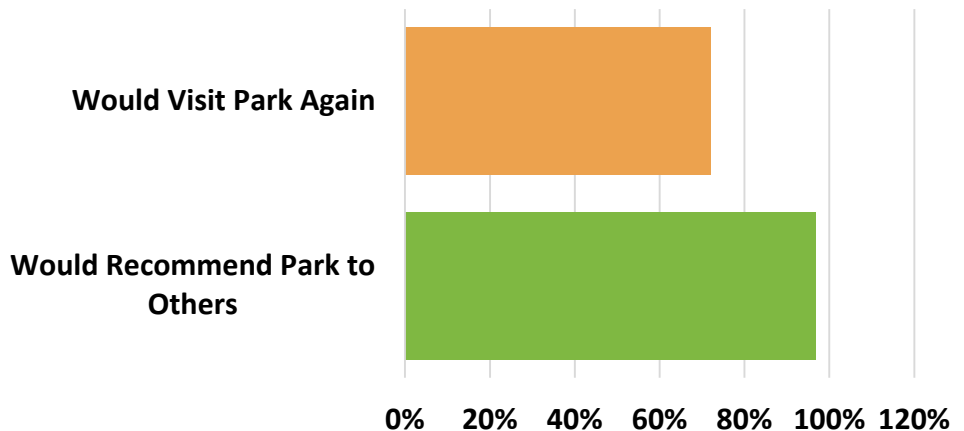
Source: CEDBR



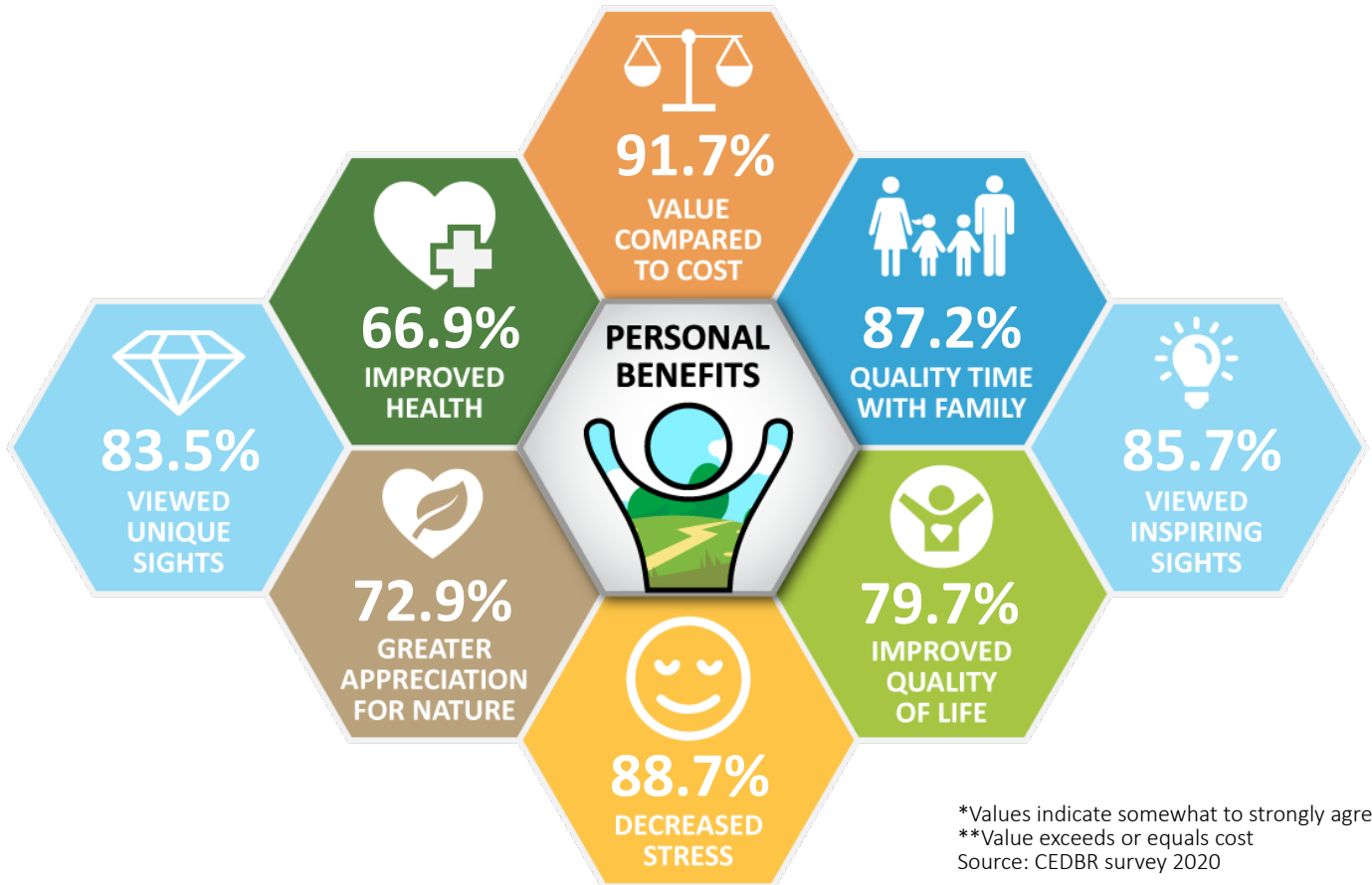
*Values indicate somewhat to strongly agree
 **N= 186
 Source: CEDBR survey 2020

More than 96 percent of survey respondents who visited Prairie Dog State Park would recommend the park to others, the fourth-highest rate of any Kansas state park. Despite those recommendations, only 71.9 percent were likely to revisit the park within 12 months, a rate 8 percentage points lower than the state average. The park had one of the highest rates among state parks by survey respondents of perceptions of having history, with 84.4 percent agreeing.

Park Visitor Satisfaction



Source: CEDBR

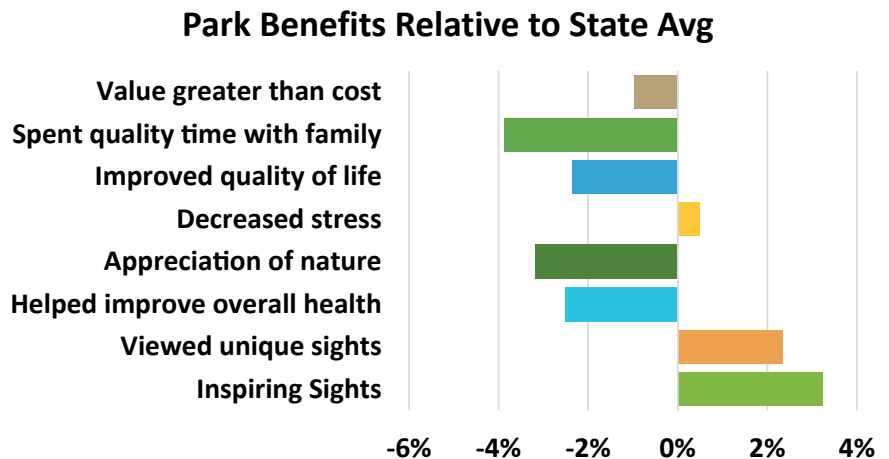


*Values indicate somewhat to strongly agree
 **Value exceeds or equals cost
 Source: CEDBR survey 2020

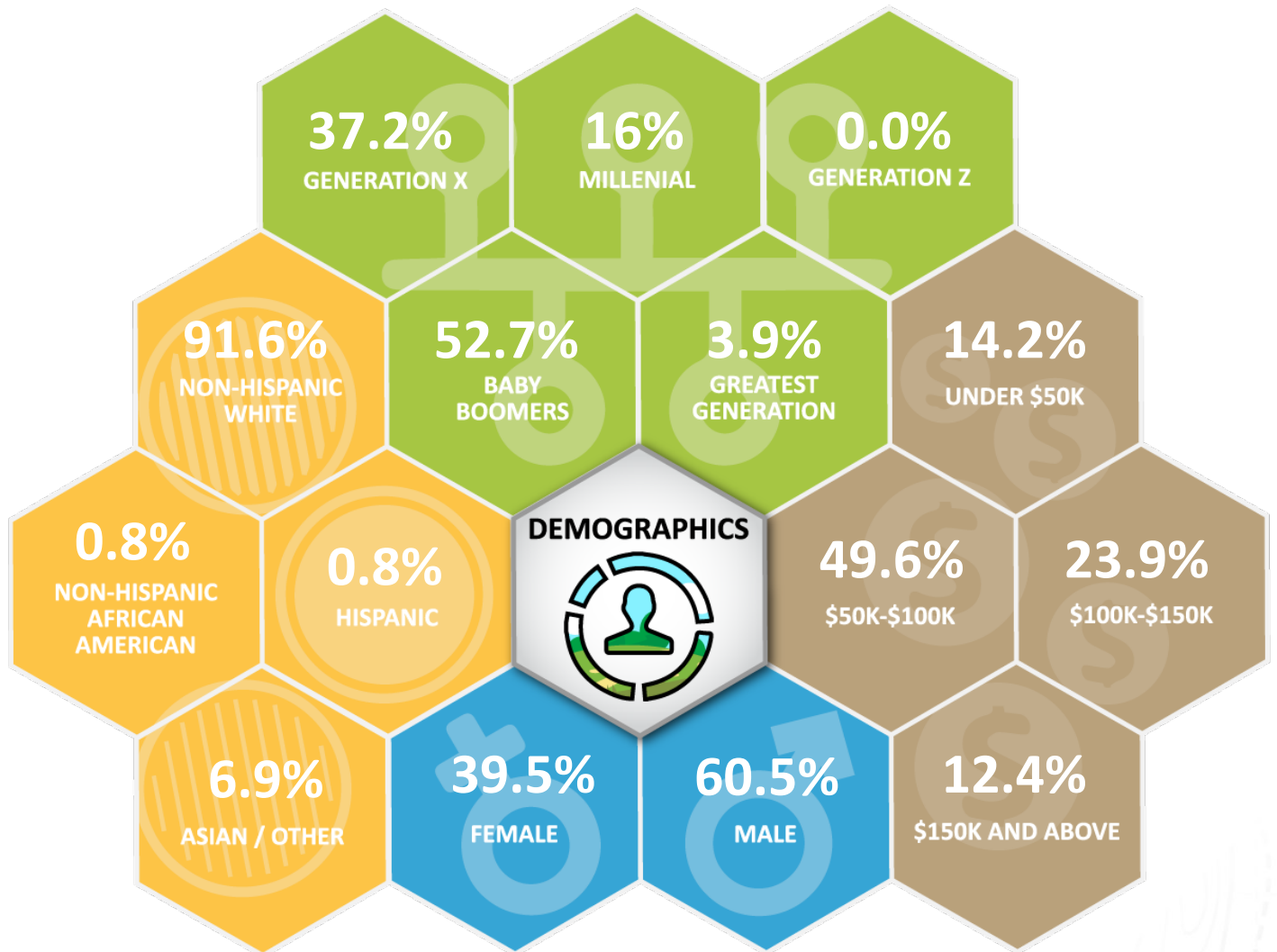
Among survey respondents who visited Prairie Dog State Park, 91.7 percent received more value from their trip than the cost, compared to only 8.3 percent whose costs exceeded the value. The park outperformed the state park system average for providing inspiring sights and unique sights to visitors by 3.2 and 2.3 percentage points, respectively. The most common benefits reported by respondents at the park were spending quality time with their family, improved quality of life, and decreased stress.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	84%	88%	75%
Viewed unique sights	82%	83%	88%
Helped Improve Overall Health	69%	67%	63%
Appreciation of nature	74%	77%	63%
Decreased stress	87%	96%	75%
Improved Quality time with Family	81%	83%	75%
Spent quality time with family	87%	88%	100%
Value greater than cost	93%	90%	88%

Source: CEDBR



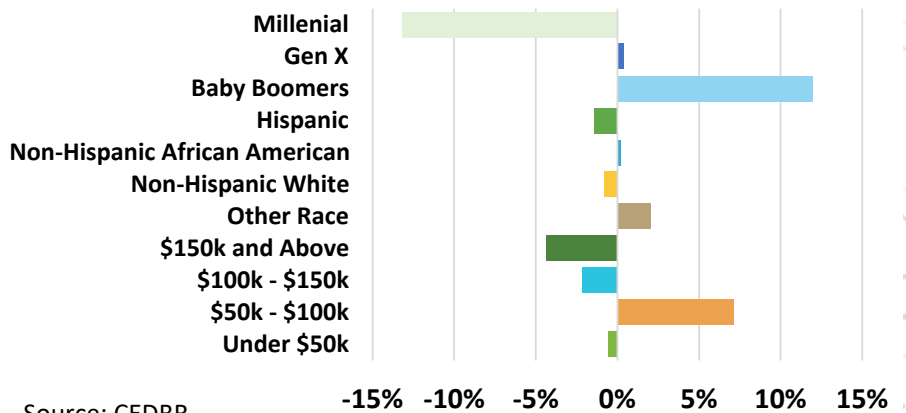
Source: CEDBR



*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Prairie Dog State Park had lower incomes than visitors to the overall state park system, with 63.7 percent earning less than \$100,000, compared to only 57.2 percent at the average state park. Prairie Dog had the highest share of earners between \$50,000 and \$100,000 of any park at 49.6 percent. Respondents from the park were, on average, 5.7 years older than the overall state park system, and the park’s 52.7 percent share from the Baby Boomer generation was the highest of any Kansas state park.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$120,794	\$1,281,165	\$247,207	\$1,649,165
EMPLOYMENT	2	47	6	55
OUTPUT	\$60,772	\$2,451,500	\$883,775	\$3,396,046

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$784	-	\$3,953
Mining		\$2,039	-	\$26,783
Construction		\$8,483	-	\$29,935
Manufacturing		\$7,800	-	\$91,630
TIPU		\$105,448	2	\$500,823
Trade		\$790,800	35	\$993,462
Service		\$708,865	18	\$1,703,841
Government		\$24,946	0	\$45,620
Total		\$1,649,165	55	\$3,396,046

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$287,884	\$211,892	\$19,007	\$33,101	\$4,080
2020	\$350,878	\$258,256	\$23,170	\$40,332	\$4,960

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,111,705	\$537,460	\$1,334,944	\$654,978
Employment	41	14	50	17
Output	\$2,030,100	\$1,365,947	\$2,475,578	\$1,664,217

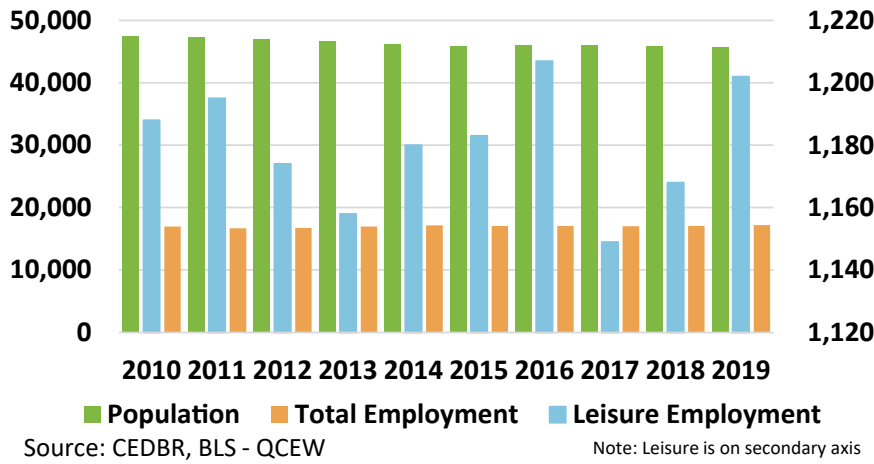
Source: CEDBR

Market Data

FRANKLIN/ANDERSON/ALLEN COUNTIES					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	45,953	45,771	-0.4%	-0.3%	12
Total Employment	17,037	17,199	1.0%	0.0%	11
Leisure & Hospitality Employment	1,168	1,202	2.9%	0.4%	13
Leisure & Hospitality Share	6.9%	7.0%	0.1%	0.3%	13
Average Annual Wage (All Industries)	\$36,179	\$37,761	4.4%	2.7%	10
Average Annual Wage (Leisure & Hosp)	\$11,970	\$12,639	5.6%	2.3%	17
L&H Employment Location Quotient	0.73	0.75	2.1%	-0.3%	10

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

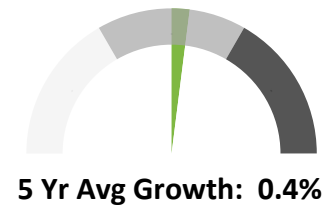
Franklin/Anderson/Allen Employment



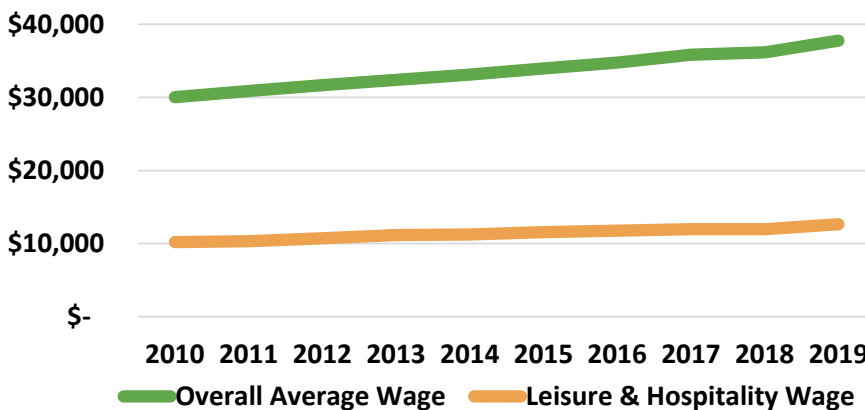
Total Population



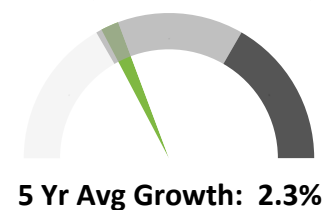
Leisure Employment



Franklin/Anderson/Allen Average Wages



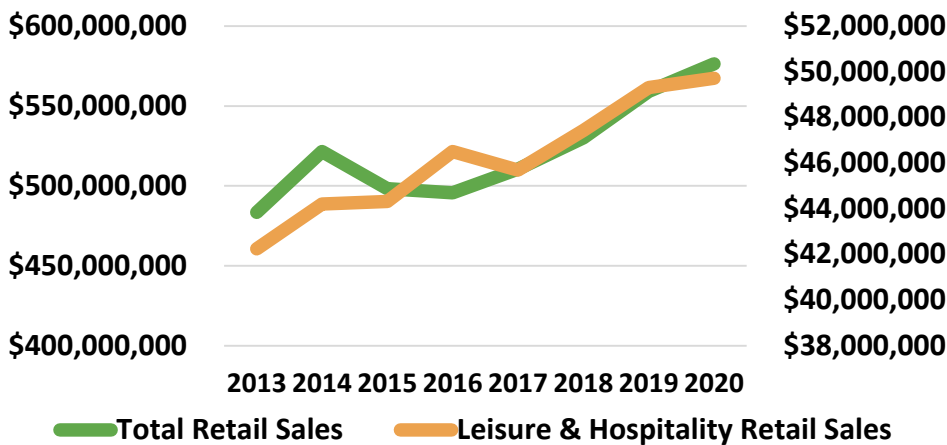
Average Leisure Wages



FRANKLIN/ANDERSON/ALLEN COUNTIES					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$559,174,030	\$576,445,860	3.1%	3.0%	6
Leisure & Hospitality Retail Sales	\$49,313,044	\$49,716,011	0.8%	2.3%	8
Per Capita Retail Sales	\$12,168.39	\$12,594.13	3.5%	3.2%	4
Per Capita L&H Retail Sales	\$1,073.12	\$1,086.19	1.2%	2.6%	9
County Pull Factor (All Sales)	0.79	0.81	3.5%	0.6%	4
County Pull Factor (L&H Sales)	0.55	0.65	18.5%	3.1%	9

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Franklin/Anderson/Allen Retail Sales



Source: CEDBR, KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



5 Yr Avg Growth: 3.0%

Leisure Retail Sales



5 Yr Avg Growth: 2.3%

County Pull Factor (All)



5 Yr Avg Growth: 0.6%

County Pull Factor (L&H)



5 Yr Avg Growth: 3.1%

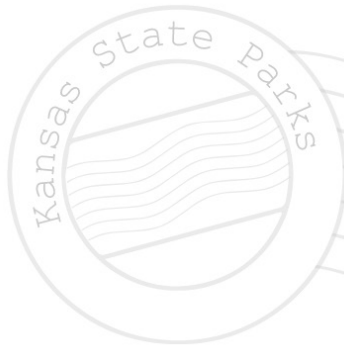
The Prairie Spirit Trail crosses three Kansas counties, and combined those counties form the sixth-largest state park market area in terms of population, total retail sales, and overall employment. The area's average annual leisure and hospitality wages were more than \$4,500 less than the state average of \$17,333. In contrast, the area's share of hospitality workers relative to total employment was more than a quarter less than the state average. Per capita leisure and hospitality spending was 35 percent below the state average, which was almost \$600 less than the average in 2020.

SAND HILLS STATE PARK | RENO COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$57,153	\$931,735	\$206,187	\$1,195,078
EMPLOYMENT	1	32	5	38
OUTPUT	\$53,580	\$1,726,973	\$701,954	\$2,482,505

Source: CEDBR

SAND HILLS STATE PARK | RENO COUNTY (CONTINUED)

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$631	-	\$3,269
Mining		\$1,259	-	\$16,399
Construction		\$4,447	-	\$16,568
Manufacturing		\$6,396	-	\$66,200
TIPU		\$62,530	2	\$377,629
Trade		\$650,927	25	\$745,923
Service		\$456,712	12	\$1,235,764
Government		\$12,175	-	\$20,753
Total		\$1,195,078	38	\$2,482,505

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$187,775	\$171,882	\$16,739	\$24,219	\$2,910
2020	\$245,866	\$224,965	\$21,926	\$31,187	\$3,674

Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$930,707	\$264,368	\$1,084,093	\$347,727
Employment	31	8	39	11
Output	\$1,861,302	\$621,205	\$2,262,931	\$813,346

Source: CEDBR

RENO COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	60,483	60,109	-0.6%	-0.6%	14
Total Employment	26,522	26,693	0.6%	-0.5%	15
Leisure & Hospitality Employment	2,982	3,084	3.4%	0.7%	9
Leisure & Hospitality Share	11.2%	11.6%	0.3%	1.2%	6
Average Annual Wage (All Industries)	\$37,786	\$38,656	2.3%	2.6%	13
Average Annual Wage (Leisure & Hosp)	\$14,315	\$14,472	1.1%	1.5%	21
L&H Employment Location Quotient	1.20	1.24	2.9%	0.0%	0

¹ Total Non-institutionalized population

² Ranking based on 26 state park areas

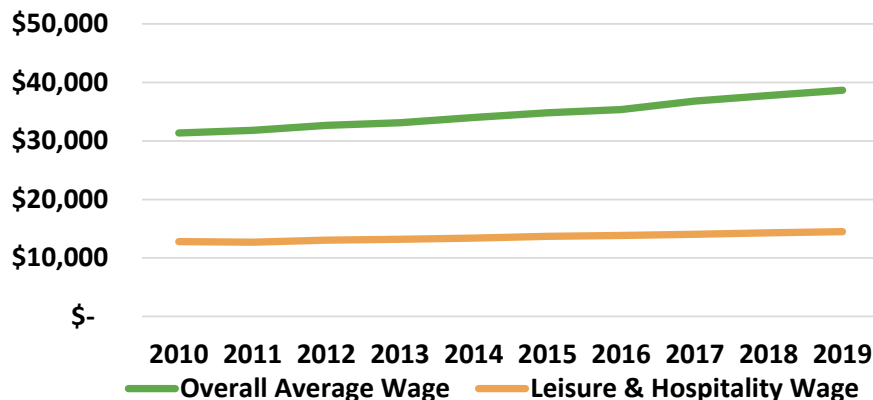
Source: CEDBR, BLS - QCEW, Census - PEP

Reno Employment



Source: CEDBR & BLS - QCEW Note: Leisure is on secondary axis

Reno Average Wages

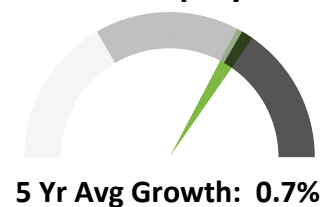


Source: CEDBR & BLS - QCEW

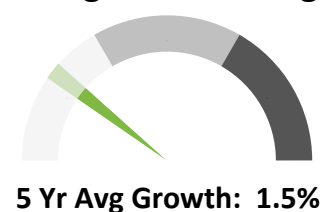
Total Population



Leisure Employment



Average Leisure Wages

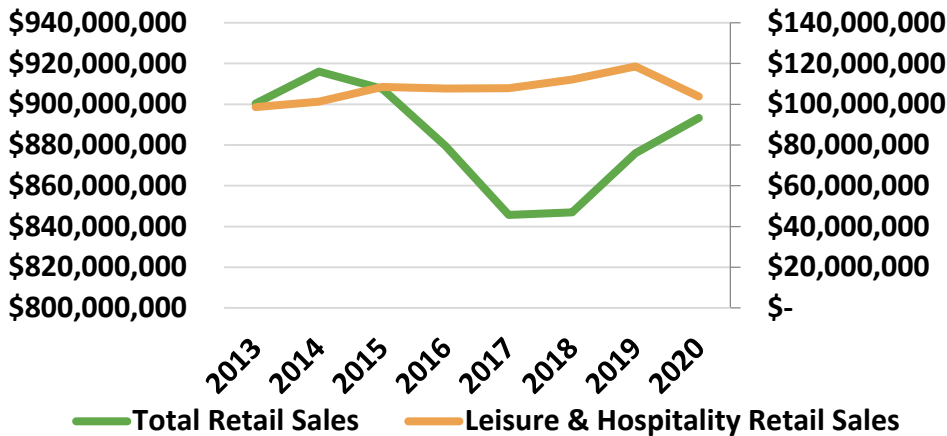


SAND HILLS STATE PARK | RENO COUNTY (CONTINUED)

RENO COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$876,045,801	\$893,242,450	2.0%	-0.3%	20
Leisure & Hospitality Retail Sales	\$118,529,386	\$103,843,380	-12.4%	-0.9%	20
Per Capita Retail Sales	\$14,484.17	\$14,860.38	2.6%	0.3%	19
Per Capita L&H Retail Sales	\$1,959.71	\$1,727.58	-11.8%	-0.3%	20
County Pull Factor (All Sales)	0.95	0.97	1.8%	-1.4%	15
County Pull Factor (L&H Sales)	1.00	1.03	3.2%	0.2%	20

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Reno Retail Sales



Source: CEDBR & KS Dept of Revenue

Note: Leisure is on secondary axis

The market area for Sand Hills State Park ranked fourth among state park areas in total retail sales and employment and had the fifth-highest population. The area stagnated some in recent years, as growth in the last five years in all three of those categories was slower than both the state average and the average state park market area. Wage growth remained more robust, with growth of 13.6 percent for average annual wages in the last five years outpacing the state average. The area's pull factors for both total retail spending and for leisure and hospitality retail spending were near 1.00, indications that spending levels in the area were similar to the state average.

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)

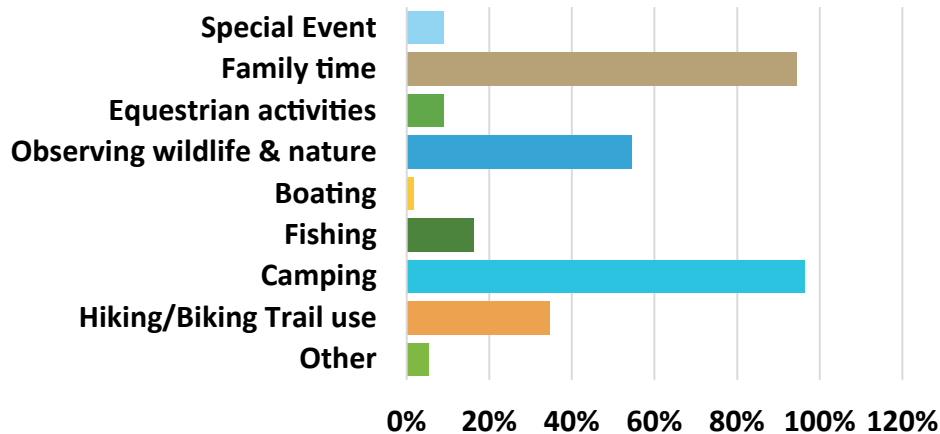


County Pull Factor (L&H)



Visitor Survey

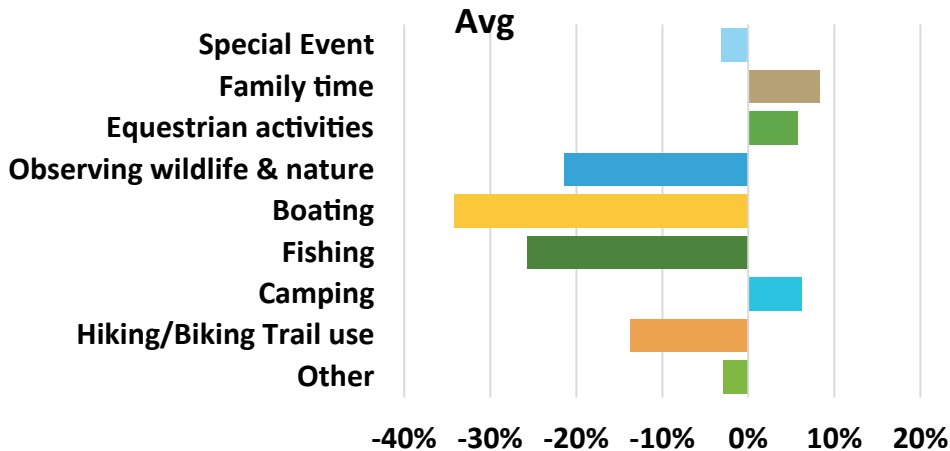
Park Visitor Activities



Sand Hills State Park’s survey respondents engaged in camping and family time at the highest rates of any state park, at 96.4 and 94.5 percent, respectively. Equestrian activities were much more popular at the park than the state park system average, as the park’s rate of 9.1 percent was 5.7 percentage points higher than average.

Source: CEDBR

Park Visitor Activities Relative to State Avg



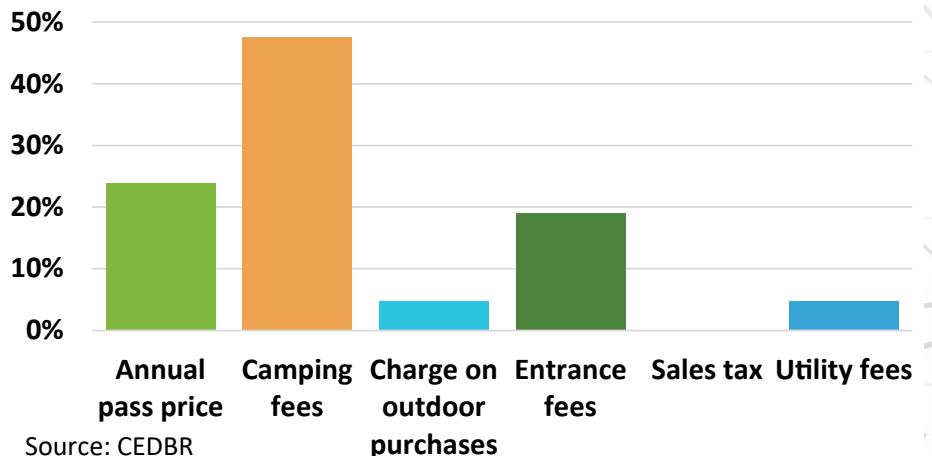
Hiking and cycling were 13.8 percentage points less frequently engaged in than average at Sand Hills.

Source: CEDBR

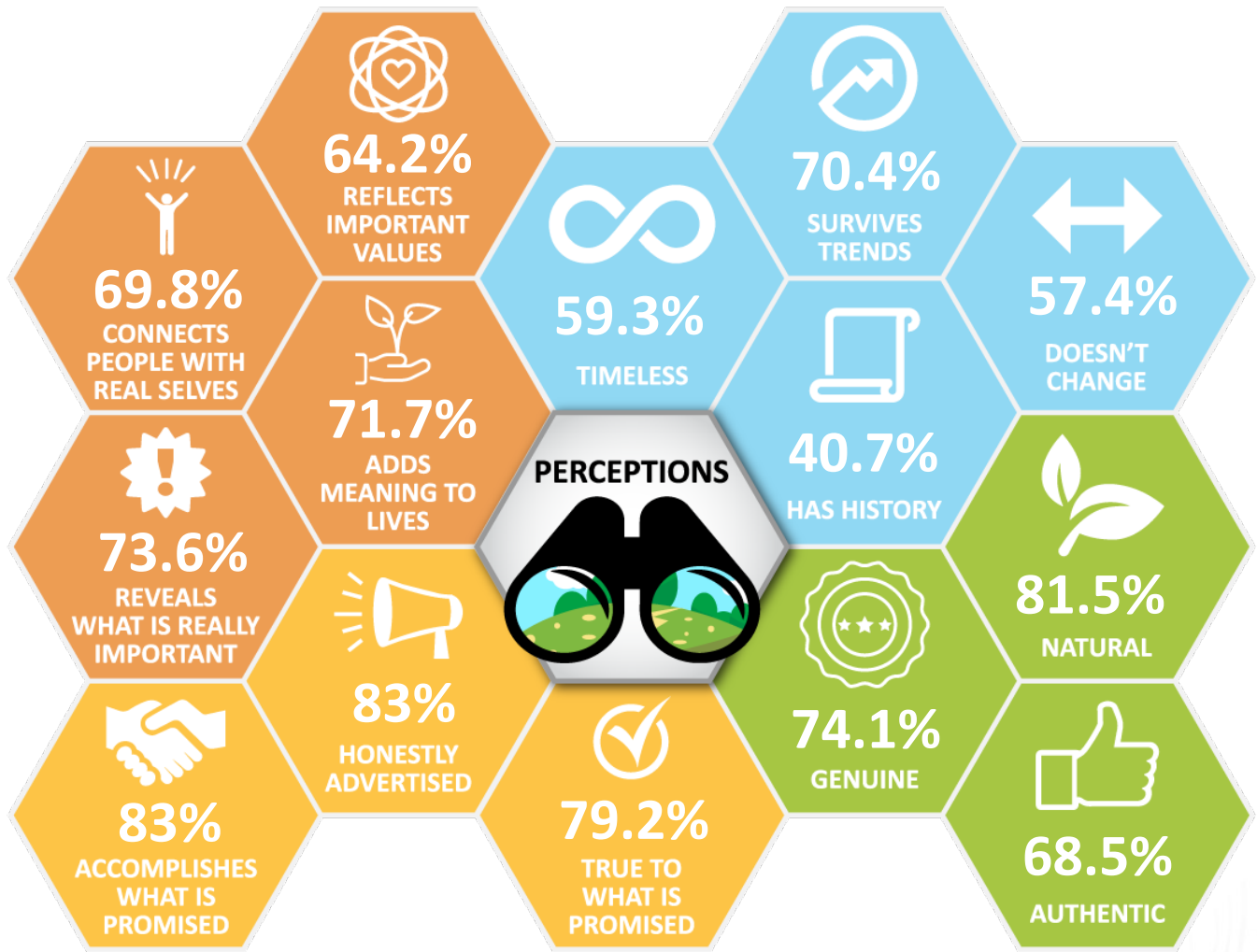
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



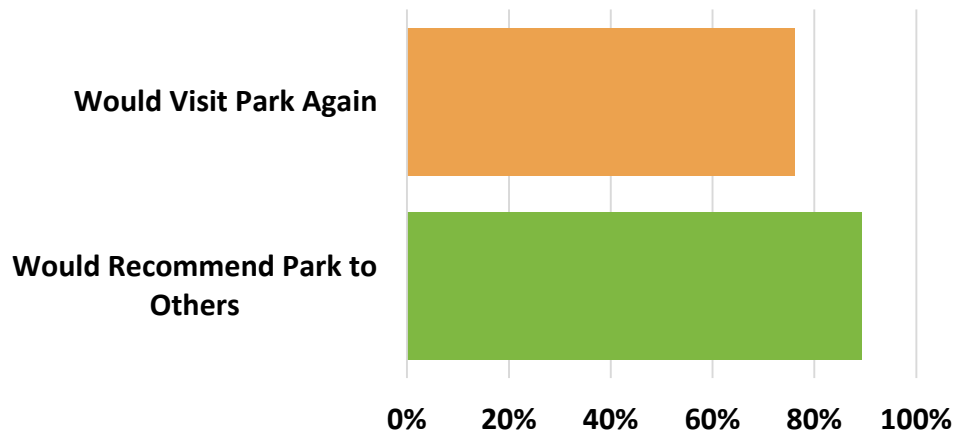
Source: CEDBR



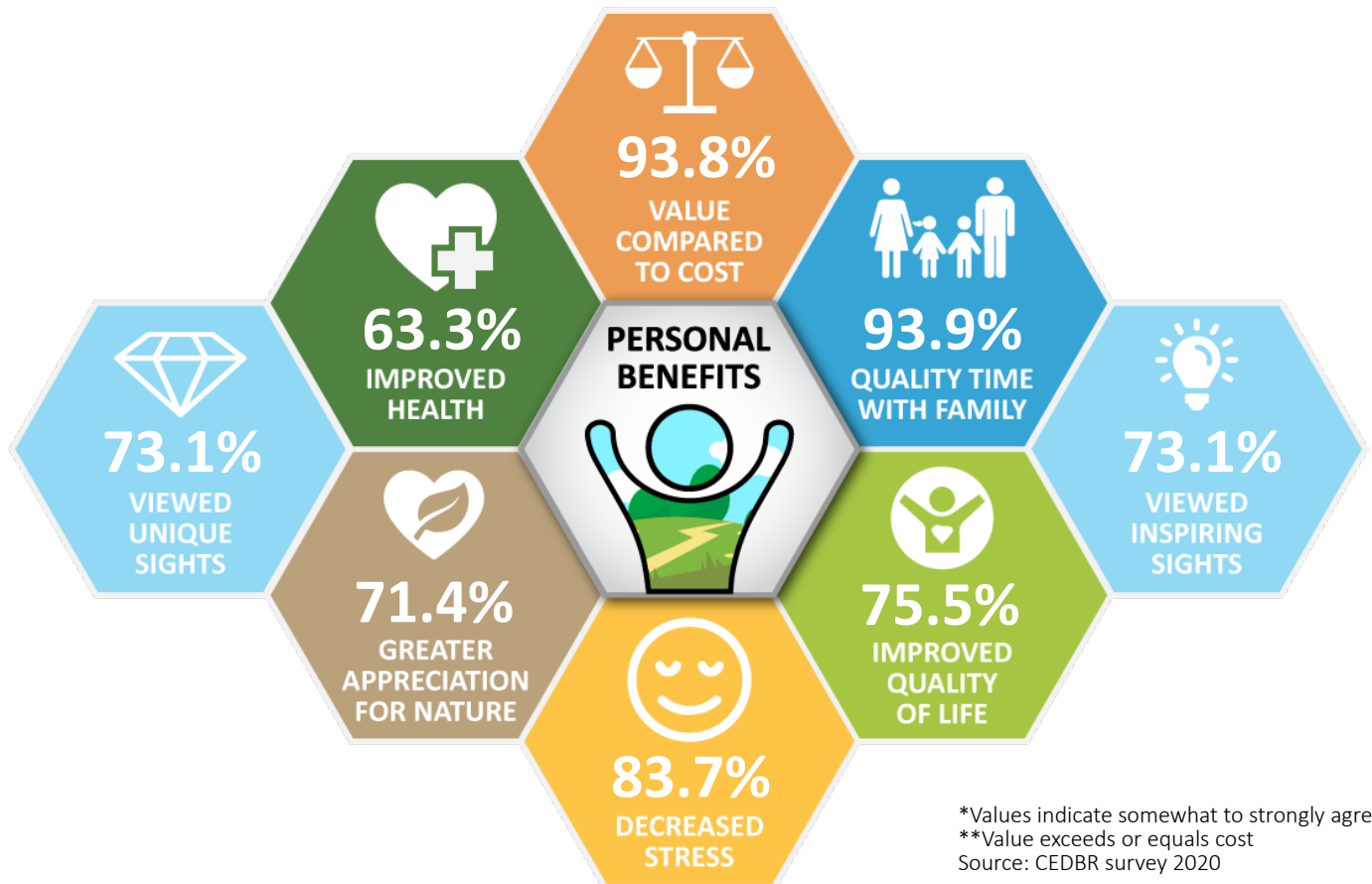
*Values indicate somewhat to strongly agree
 **N= 76
 Source: CEDBR survey 2020

Survey respondents were generally satisfied with their visits to Sand Hills State Park, with nine in ten likely to recommend the park and three in four likely to revisit the park within 12 months. The park received high marks for being perceived as honestly advertised and accomplishing what it promises to visitors. The park's lowest marks were in perceptions of timelessness, being a place that does not change and having history.

Park Visitor Satisfaction



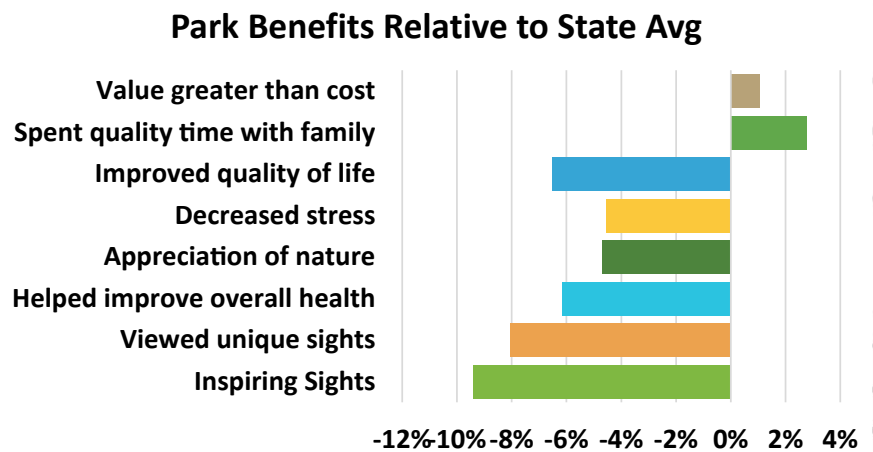
Source: CEDBR

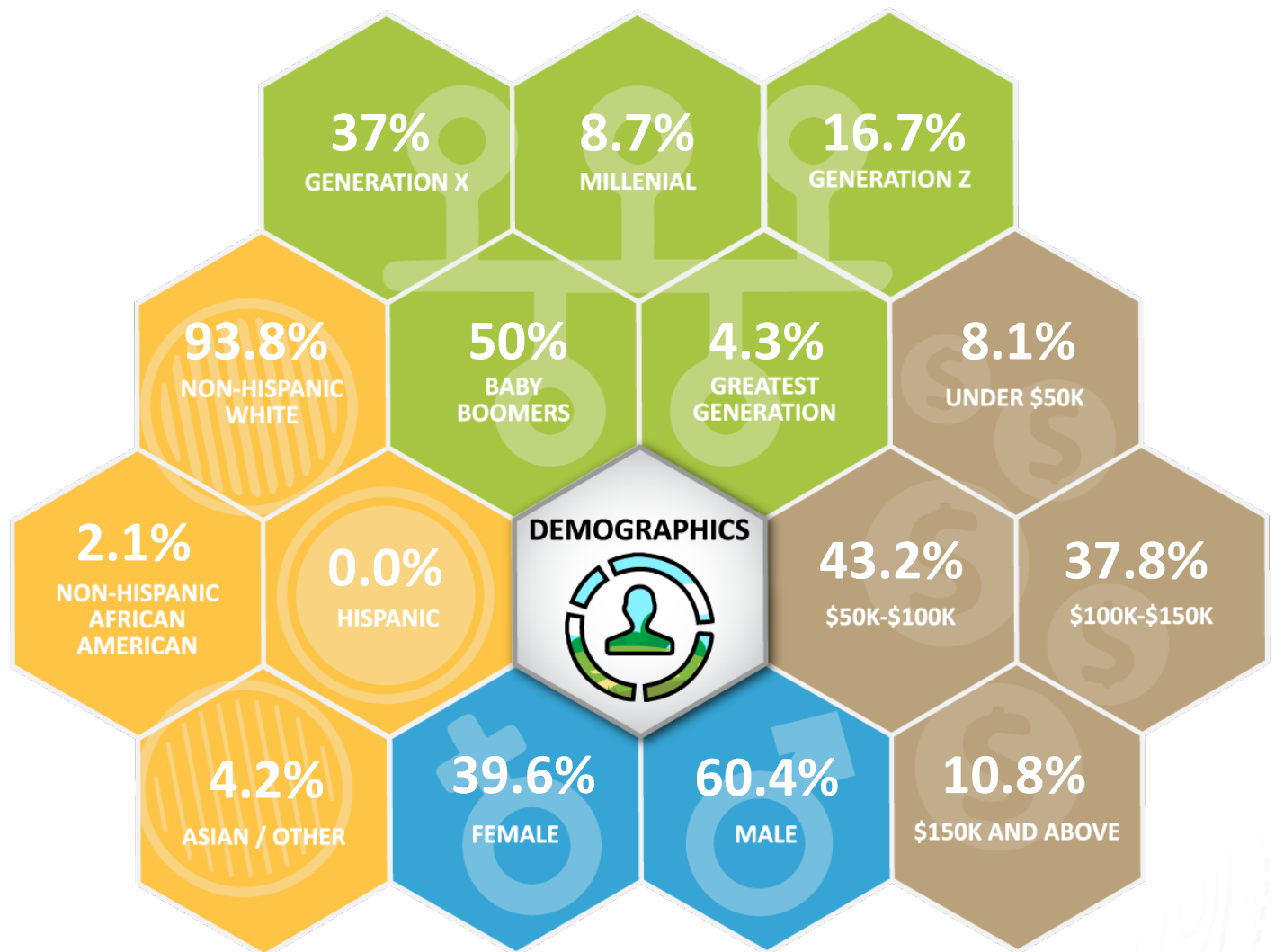


Despite survey respondents reporting that their value visiting Sand Hills State Park exceeded the costs 93.8 percent of the time, the park received below-average marks in six of the seven personal benefit categories. The most below-average benefits were viewing inspiring and unique sights, which were observed at rates 9.4 and 8.1 percentage points lower than the state park system average, respectively. The only benefit reported at an above-average rate was spending quality time with family, which was 2.8 percentage points above average.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	70%	76%	75%
Viewed unique sights	65%	88%	50%
Helped Improve Overall Health	61%	65%	75%
Appreciation of nature	78%	71%	50%
Decreased stress	83%	88%	75%
Improved Quality time with Family	78%	71%	75%
Spent quality time with family	96%	94%	75%
Value greater than cost	96%	88%	100%

Source: CEDBR

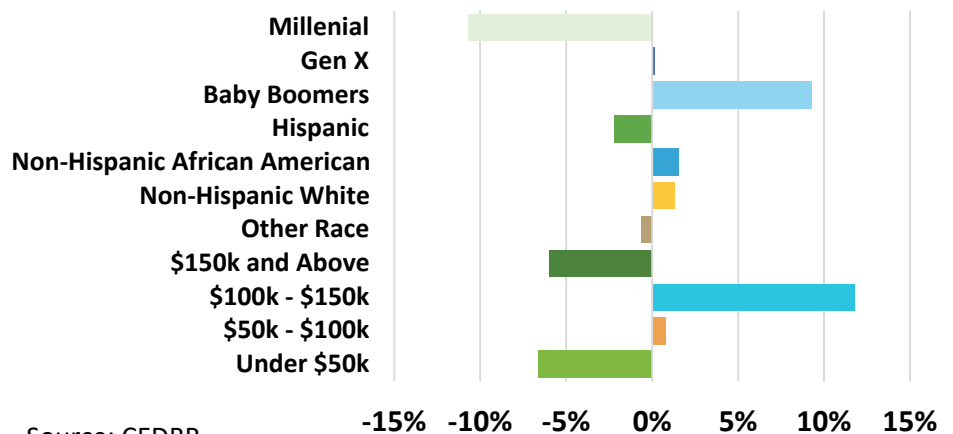




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Sand Hills State Park were 5.5 years older than respondents from the overall state park system, the second oldest of any Kansas state park. The park's share of respondents from the Baby Boomer generation was 50 percent, the fourth-highest of any state park, while the share from the Millennial generation was 8.7 percent, second-lowest of any park. More than 48 percent of the park's respondents earned more than \$100,000 annually, a rate 5.8 percentage points greater than the state park system average.

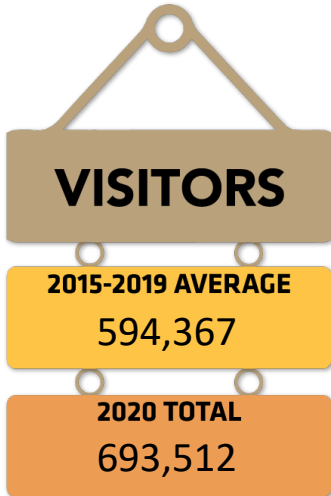
Park Visitor Demographics Relative to State Avg



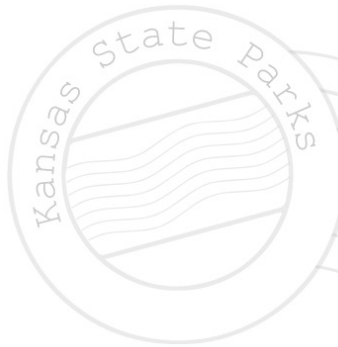
Source: CEDBR

TUTTLE CREEK STATE PARK | POTTAWATOMIE COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$286,986	\$9,841,722	\$1,518,125	\$11,646,833
EMPLOYMENT	6	389	38	434
OUTPUT	\$231,633	\$19,766,236	\$5,472,282	\$25,470,146

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$5,904	-	\$30,754
Mining		\$10,956	1	\$196,151
Construction		\$52,119	1	\$193,710
Manufacturing		\$53,293	1	\$619,319
TIPU		\$612,082	13	\$4,002,315
Trade		\$6,961,181	299	\$8,334,057
Service		\$3,808,277	117	\$11,824,852
Government		\$143,020	2	\$268,988
Total		\$11,646,833	434	\$25,470,146

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$2,649,255	\$1,638,542	\$197,369	\$267,854	\$29,757
2020	\$3,091,376	\$1,911,989	\$230,303	\$312,622	\$34,726

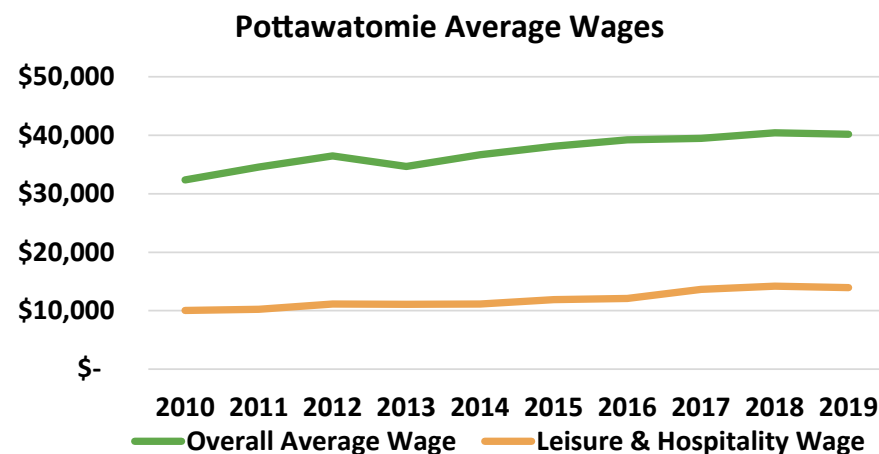
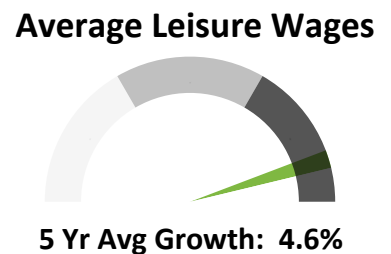
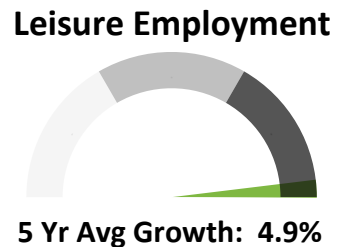
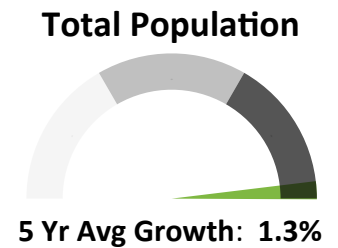
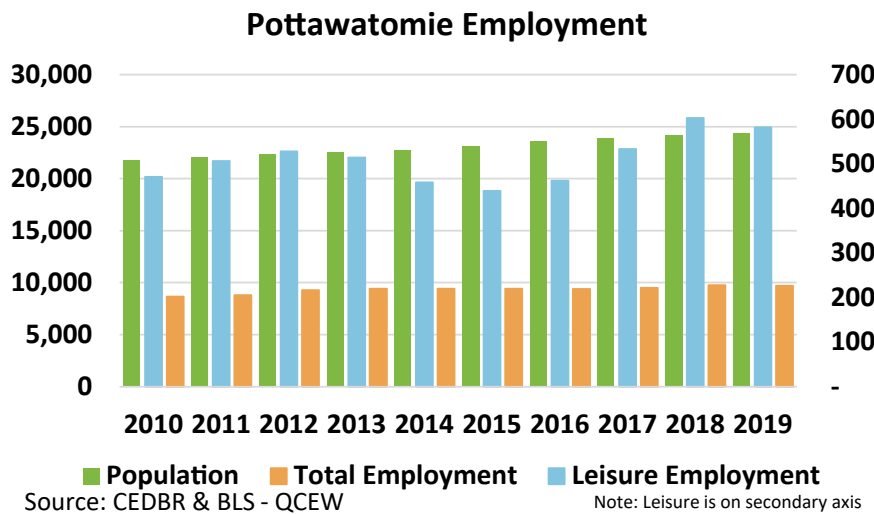
Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$8,317,662	\$3,329,168	\$9,702,550	\$3,884,988
Employment	337	97	391	113
Output	\$17,625,691	\$7,844,455	\$20,597,865	\$9,154,562

Source: CEDBR

POTTAWATOMIE COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population¹	24,277	24,383	0.4%	1.3%	1
Total Employment	9,760	9,711	-0.5%	0.6%	6
Leisure & Hospitality Employment	603	582	-3.5%	4.9%	1
Leisure & Hospitality Share	6.2%	6.0%	-0.2%	4.3%	3
Average Annual Wage (All Industries)	\$40,432	\$40,172	-0.6%	1.8%	20
Average Annual Wage (Leisure & Hosp)	\$14,214	\$13,959	-1.8%	4.6%	3
L&H Employment Location Quotient	0.66	0.64	-2.8%	0.0%	0

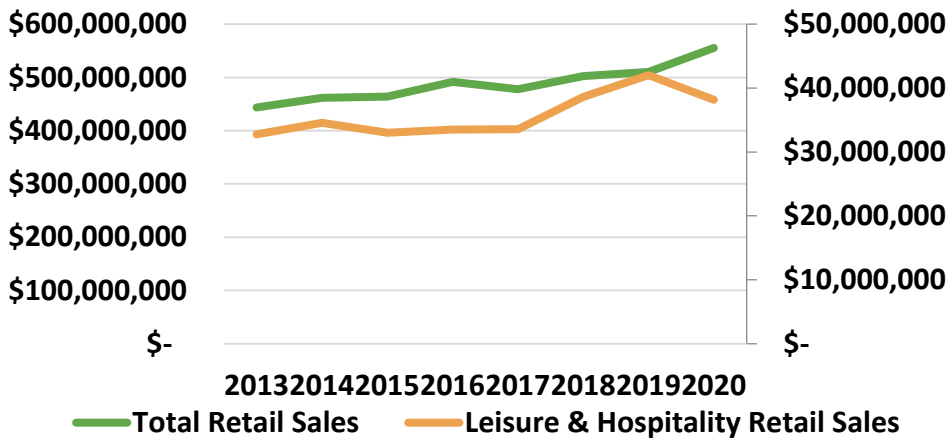
¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



POTTAWATOMIE COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$510,381,422	\$555,128,971	8.8%	3.6%	3
Leisure & Hospitality Retail Sales	\$42,017,114	\$38,150,577	-9.2%	2.9%	6
Per Capita Retail Sales	\$21,023.25	\$22,767.05	8.3%	2.3%	7
Per Capita L&H Retail Sales	\$1,730.74	\$1,564.64	-9.6%	1.7%	12
County Pull Factor (All Sales)	1.41	1.39	-1.1%	-0.3%	10
County Pull Factor (L&H Sales)	0.88	0.94	5.8%	2.2%	12

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Pottawatomie Retail Sales



Source: CEDBR & KS Dept of Revenue

Note: Leisure is on secondary axis

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)



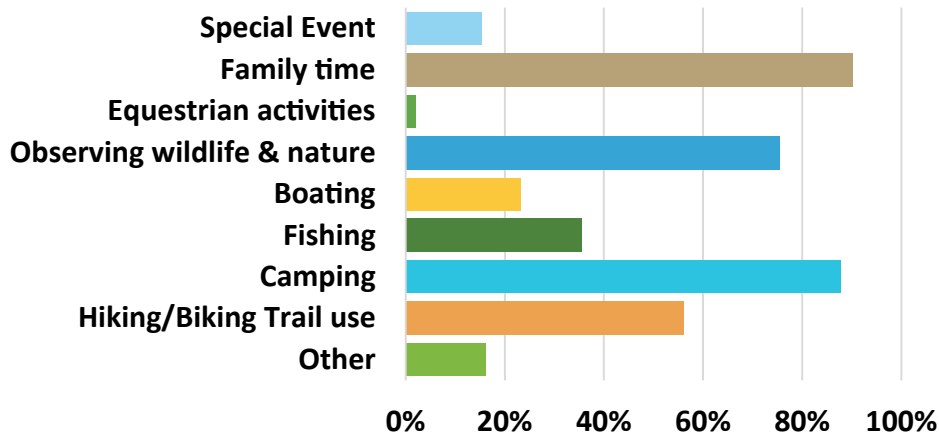
County Pull Factor (L&H)



Tuttle Creek’s market area was the fastest growing in Kansas, expanding in population by 6.5 percent from 2014 to 2019, which added almost 1,500 residents to the area. The area also led all Kansas market areas in leisure and hospitality employment growth at 27.1 percent from 2014 to 2019, adding more than 130 workers. While the area’s average annual wages across all industries were somewhat below the state average, the area’s average annual leisure and hospitality wages grew the third fastest among state park market areas. The area’s retail spending was the highest of any market area on a per capita basis, \$22,767 in 2020, while leisure and hospitality spending was similar to the state average.

Visitor Survey

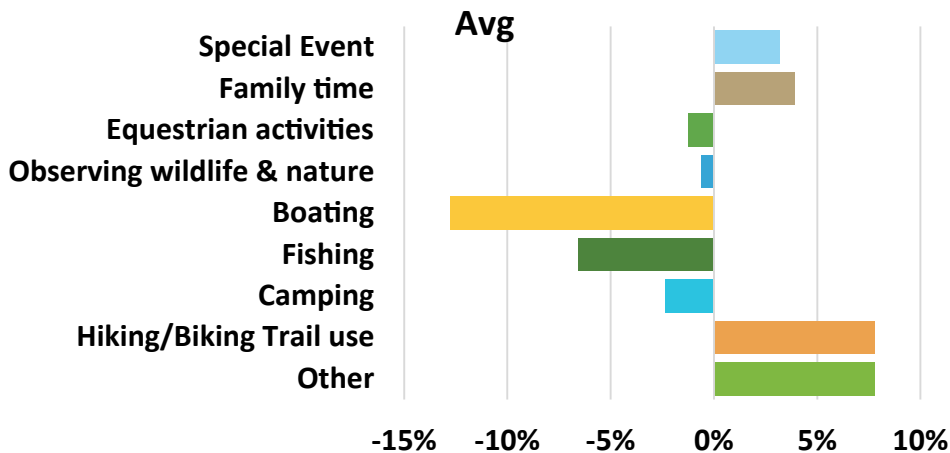
Park Visitor Activities



The most popular activity at Tuttle Creek State Park among survey respondents who visited the park was family time, one of only six Kansas state parks where that was the case. Hiking and cycling were more popular than the state average at Tuttle Creek, engaged in by 56.1 percent of respondents.

Source: CEDBR

Park Visitor Activities Relative to State



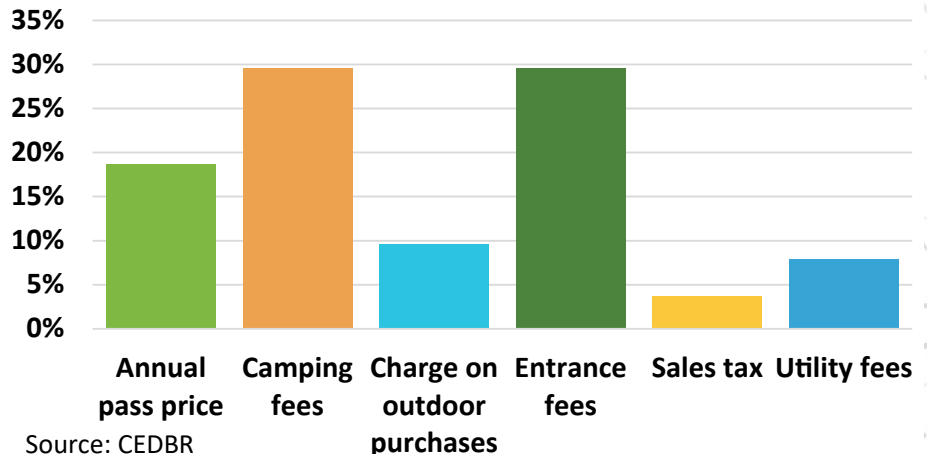
Almost two-thirds of respondents supported increasing fees to improve services, increasing entrance fees and camping fees, each getting approximately 30 percent support.

Source: CEDBR

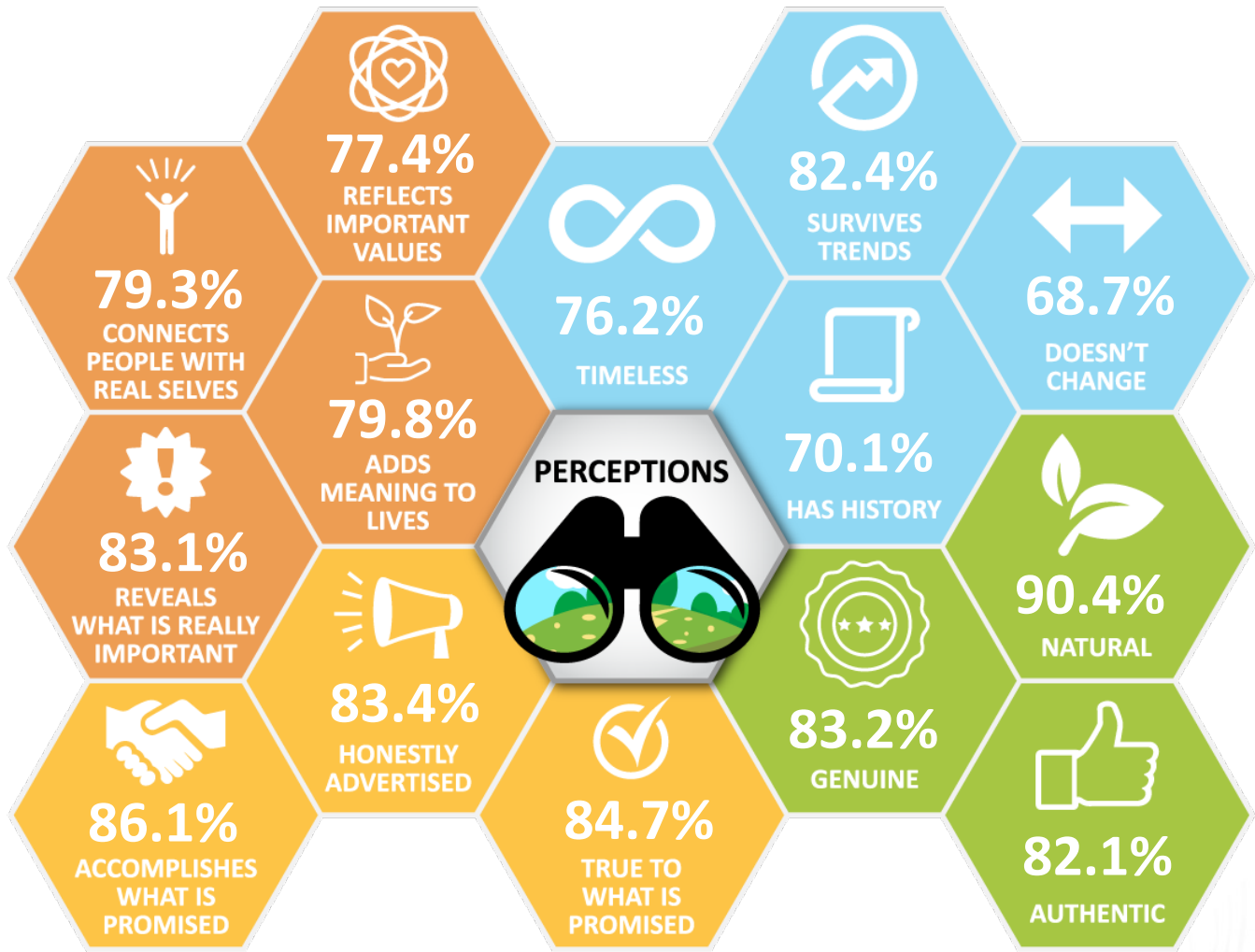
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



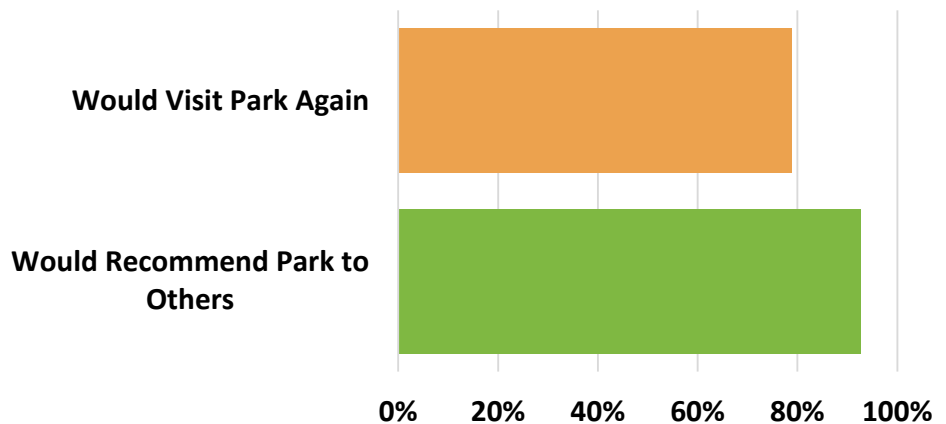
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 524
 Source: CEDBR survey 2020

Tuttle Creek State Park was popular with survey respondents as 92.7 percent who visited would recommend the park, a rate 0.8 percentage points higher than the state park system average. Perceptions of the park were largely positive and in line with the average state park. The perception that the park was natural was the most agreed-upon of the 14 perception categories. In contrast, the perception that the park was a place that survives trends was the most above-average perception, agreed with at a rate 3 percentage points higher than average.

Park Visitor Satisfaction



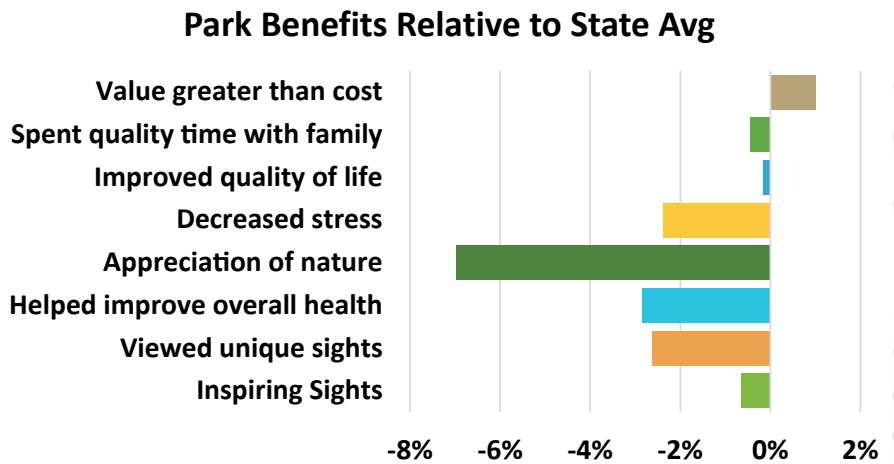
Source: CEDBR

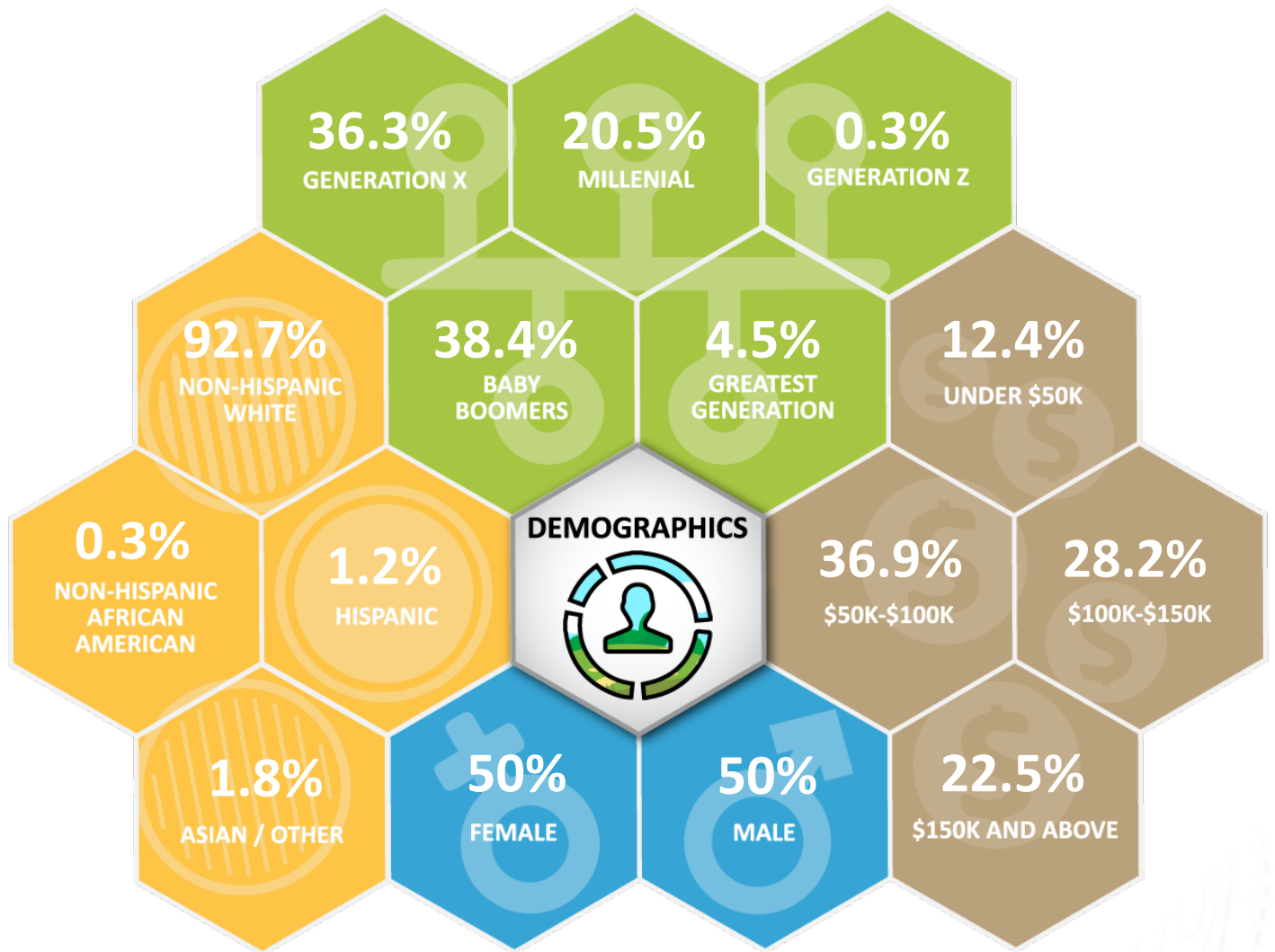


Among survey respondents who visited Tuttle Creek State Park, 93.7 percent viewed their visit as having more value than the cost, 1 percentage point above the state park system average. The park rated modestly below the state average in each of the seven benefit categories, with the largest under-performance in appreciating nature, which was 7 percentage points below average. The park’s most common benefits to visitors were spending quality time with family, improved quality of life, and inspiring sights.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	80%	84%	83%
Viewed unique sights	80%	81%	74%
Helped Improve Overall Health	66%	69%	71%
Appreciation of nature	67%	70%	77%
Decreased stress	81%	92%	88%
Improved Quality time with Family	74%	88%	88%
Spent quality time with family	89%	93%	93%
Value greater than cost	93%	98%	93%

Source: CEDBR

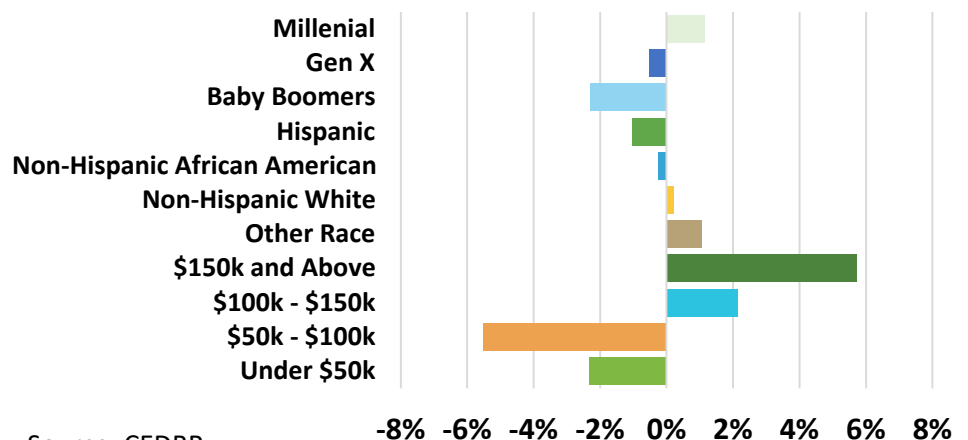




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Tuttle Creek’s survey respondents tended to have higher incomes than the average state park visitor, with 50.7 percent having incomes of \$100,000 or greater. The park’s share of respondents with an income of greater than \$150,000 was the second-highest of any Kansas state park. The park’s respondents’ age demographics were largely representative of the overall state park system, with an average age of 0.7 years younger than average.

Park Visitor Demographics Relative to State Avg



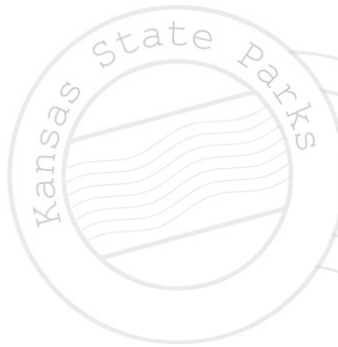
Source: CEDBR

WEBSTER STATE PARK | ROOKS COUNTY

Economic Impact



*Visitor Days



Kansas State Parks











	DIRECT 	INDIRECT 	INDUCED 	TOTAL
LABOR	\$154,403	\$1,617,066	\$214,171	\$1,985,646
EMPLOYMENT	4	93	6	102
OUTPUT	\$72,174	\$3,235,203	\$871,455	\$4,178,828

Source: CEDBR

WEBSTER STATE PARK | ROOKS COUNTY (CONTINUED)

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$968	-	\$6,118
Mining		\$1,428	-	\$29,297
Construction		\$5,218	-	\$23,959
Manufacturing		\$5,185	-	\$58,923
TIPU		\$94,297	2	\$378,969
Trade		\$1,106,421	74	\$1,730,641
Service		\$755,839	26	\$1,913,677
Government		\$16,290	-	\$37,244
Total		\$1,985,646	102	\$4,178,828

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$361,908	\$601,341	\$31,509	\$37,277	\$4,669
2020	\$541,187	\$898,803	\$47,124	\$55,610	\$6,900

Source: CEDBR

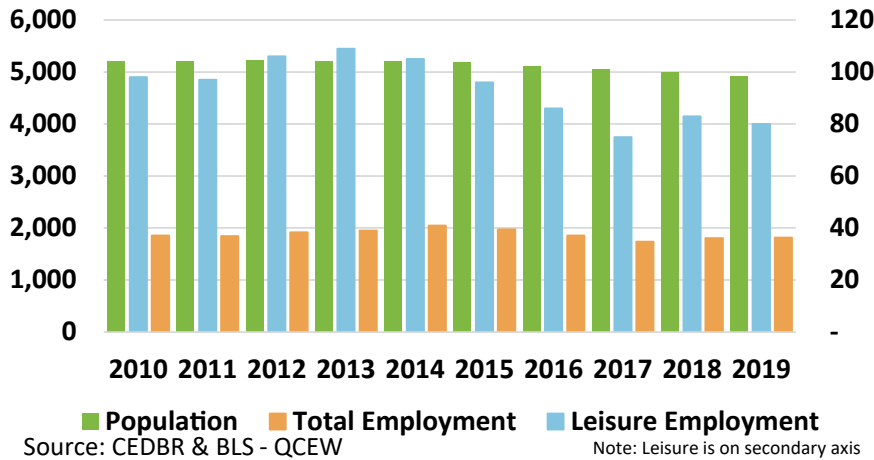
PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,335,175	\$650,469	\$1,856,971	\$973,285
Employment	83	20	120	30
Output	\$2,709,148	\$1,469,680	\$3,985,712	\$2,197,296

Source: CEDBR

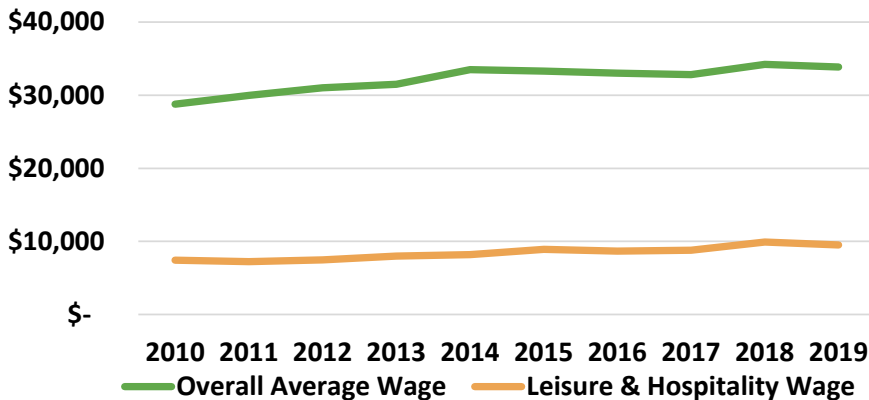
ROOKS COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	4,885	4,792	-1.9%	-1.4%	23
Total Employment	1,806	1,815	0.5%	-2.4%	23
Leisure & Hospitality Employment	83	80	-3.6%	-5.3%	24
Leisure & Hospitality Share	4.6%	4.4%	-0.2%	-3.0%	22
Average Annual Wage (All Industries)	\$34,244	\$33,884	-1.1%	0.2%	25
Average Annual Wage (Leisure & Hosp)	\$9,929	\$9,493	-4.4%	3.0%	10
L&H Employment Location Quotient	0.49	0.47	-3.9%	0.0%	0

¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP

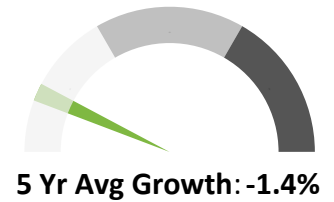
Rooks Employment



Rooks Average Wages



Total Population



Leisure Employment



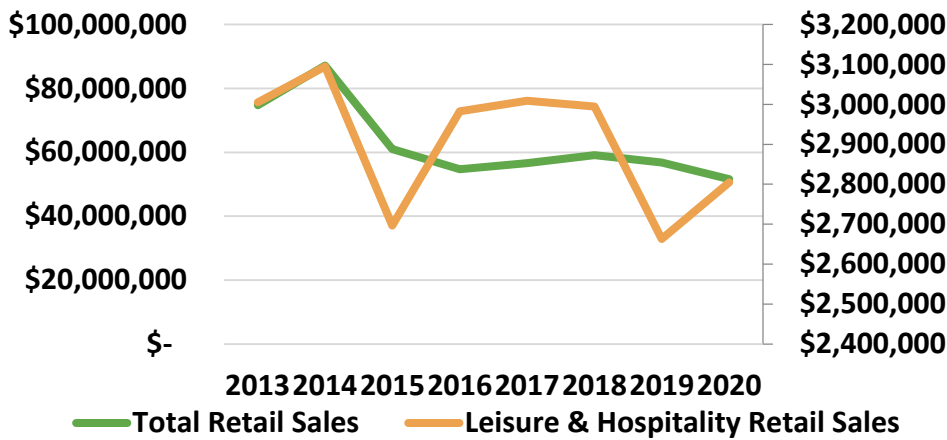
Average Leisure Wages



ROOKS COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$56,775,523	\$51,600,888	-9.1%	-3.3%	25
Leisure & Hospitality Retail Sales	\$2,663,284	\$2,804,880	5.3%	0.8%	14
Per Capita Retail Sales	\$11,622.42	\$10,768.13	-7.4%	-1.9%	24
Per Capita L&H Retail Sales	\$545.20	\$585.33	7.4%	2.3%	11
County Pull Factor (All Sales)	0.82	0.79	-4.3%	-7.9%	25
County Pull Factor (L&H Sales)	0.28	0.35	25.7%	2.8%	11

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Rooks Retail Sales



Source: CEDBR & KS Dept of Revenue

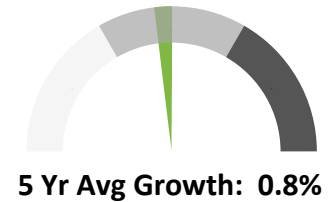
Note: Leisure is on secondary axis

Webster State Park had the seven-smallest market area of any Kansas state park with a population of 4,792 in 2019. Both the area’s employment and population contracted at the fourth-fastest rate among park market areas, but wages continued to grow. Although average annual wages across all industries grew 1.2 percent from 2014 to 2019, leisure and hospitality wages increased 15.9 percent. The area’s retail pull factor was 0.78, a sign that overall retail spending per capita was approximately one-fifth lower than the state average, while the leisure and hospitality pull factor was 0.35.

Total Taxable Retail Sales



Leisure Retail Sales



County Pull Factor (All)

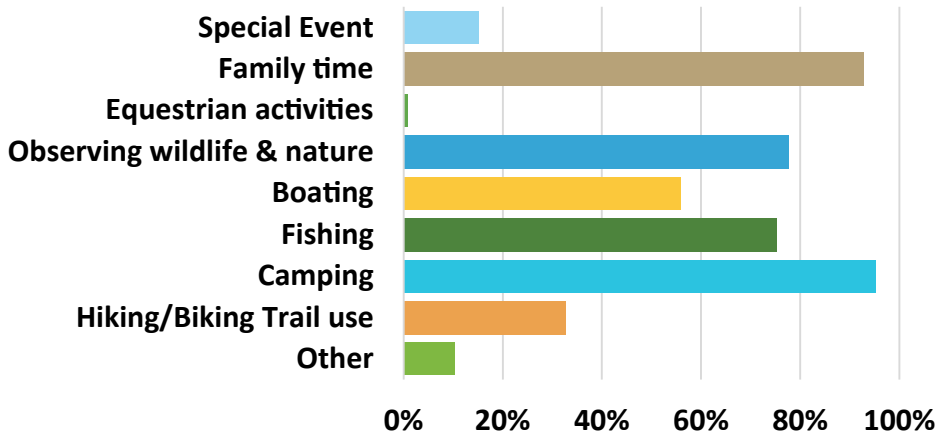


County Pull Factor (L&H)



Visitor Survey

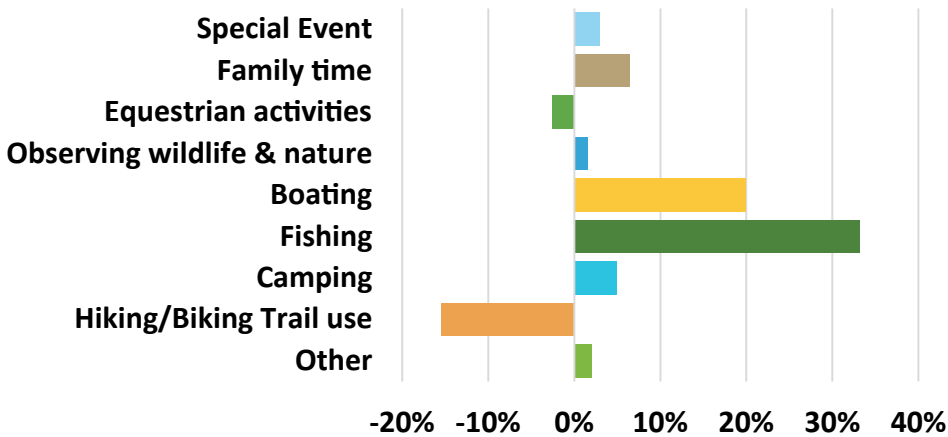
Park Visitor Activities



Source: CEDBR

Survey respondents who visited Webster State Park had the highest engagement with any Kansas state park fishing activities, 75.2 percent. Boating activities were also far more popular than at the average state park, with 56 percent of respondents engaging in boating on their most recent visit.

Park Visitor Activities Relative to State Avg



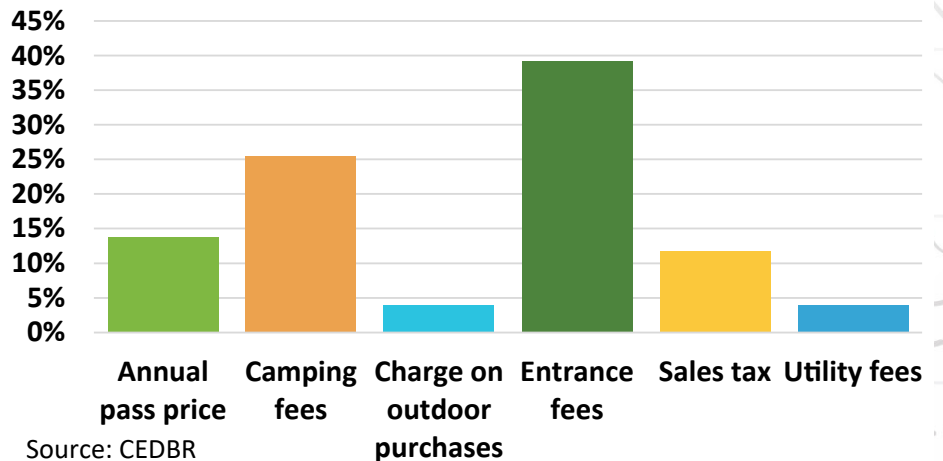
Source: CEDBR

Webster had the fifth-lowest rate of hiking and cycling and the eighth-lowest rate of equestrian activities, making it one of the parks most focused on water activities relative to trail-based activities.

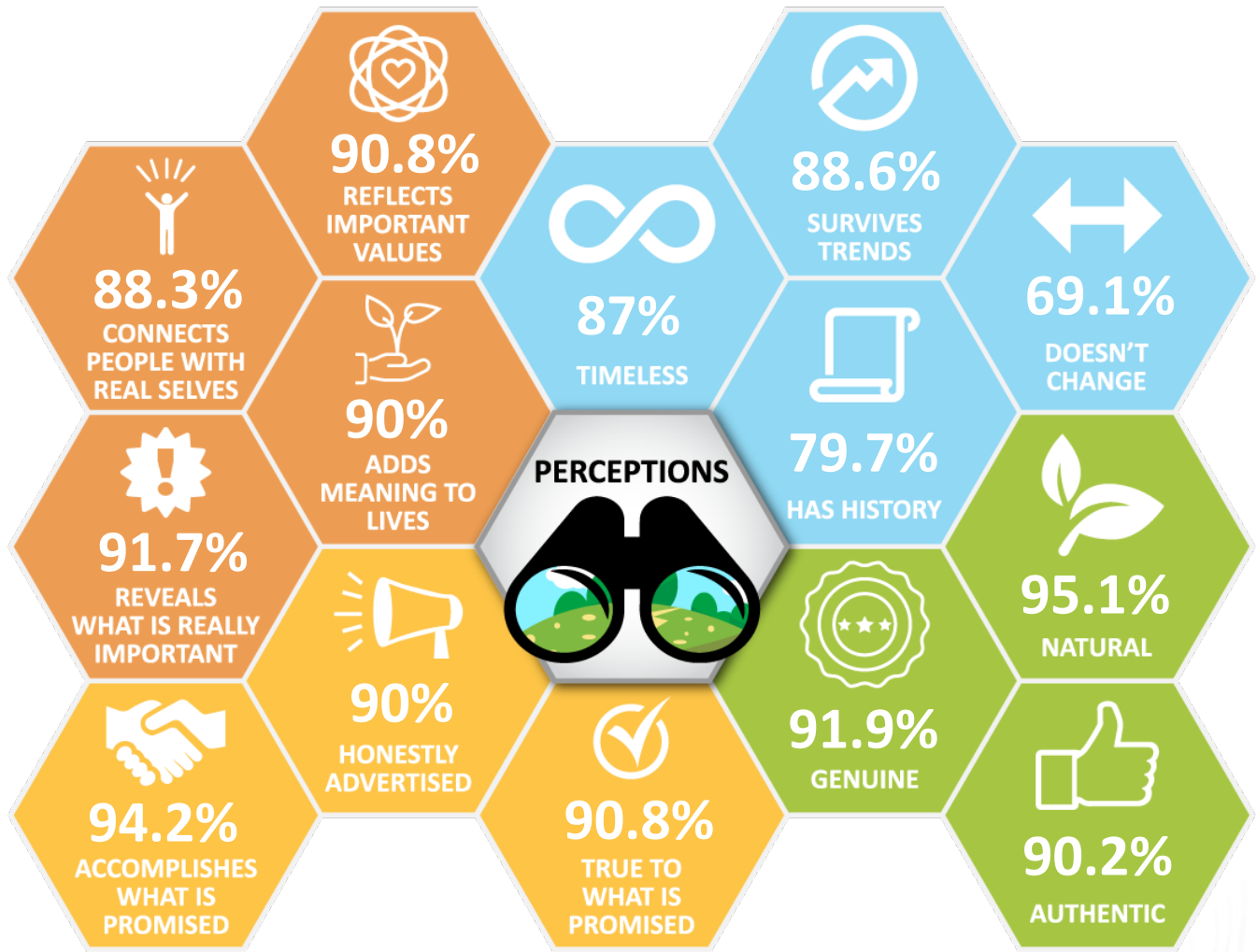
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



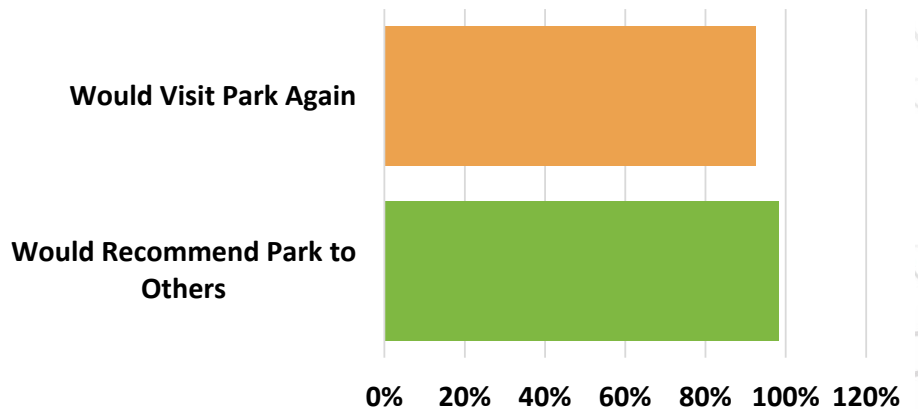
Source: CEDBR



*Values indicate somewhat to strongly agree
 **N= 164
 Source: CEDBR survey 2020

Webster State Park had the second-highest level of recommendations from survey respondents at 98.2 percent, and 92.5 percent of respondents were likely to visit again in the next 12 months, the highest level of any Kansas state park. The park had the highest level of agreement of any Kansas state park for the following perceptions: the park is a place that adds meaning to people's lives, a place that reflects important values, and a place that connects people with their real selves.

Park Visitor Satisfaction



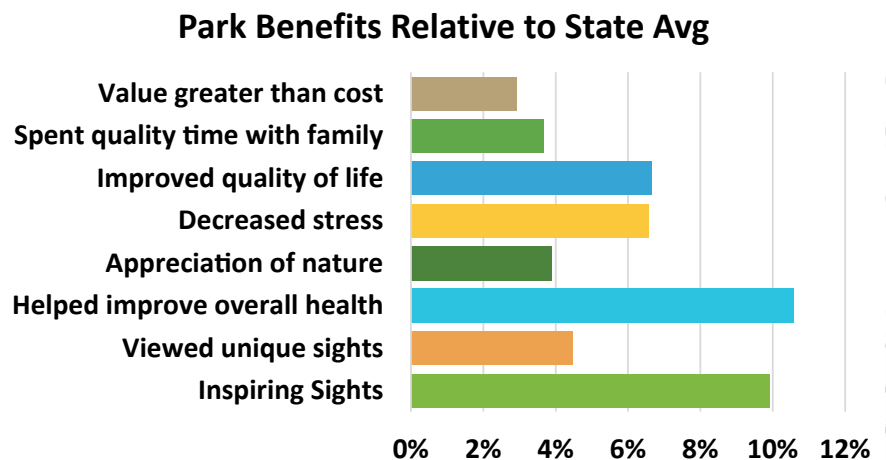
Source: CEDBR

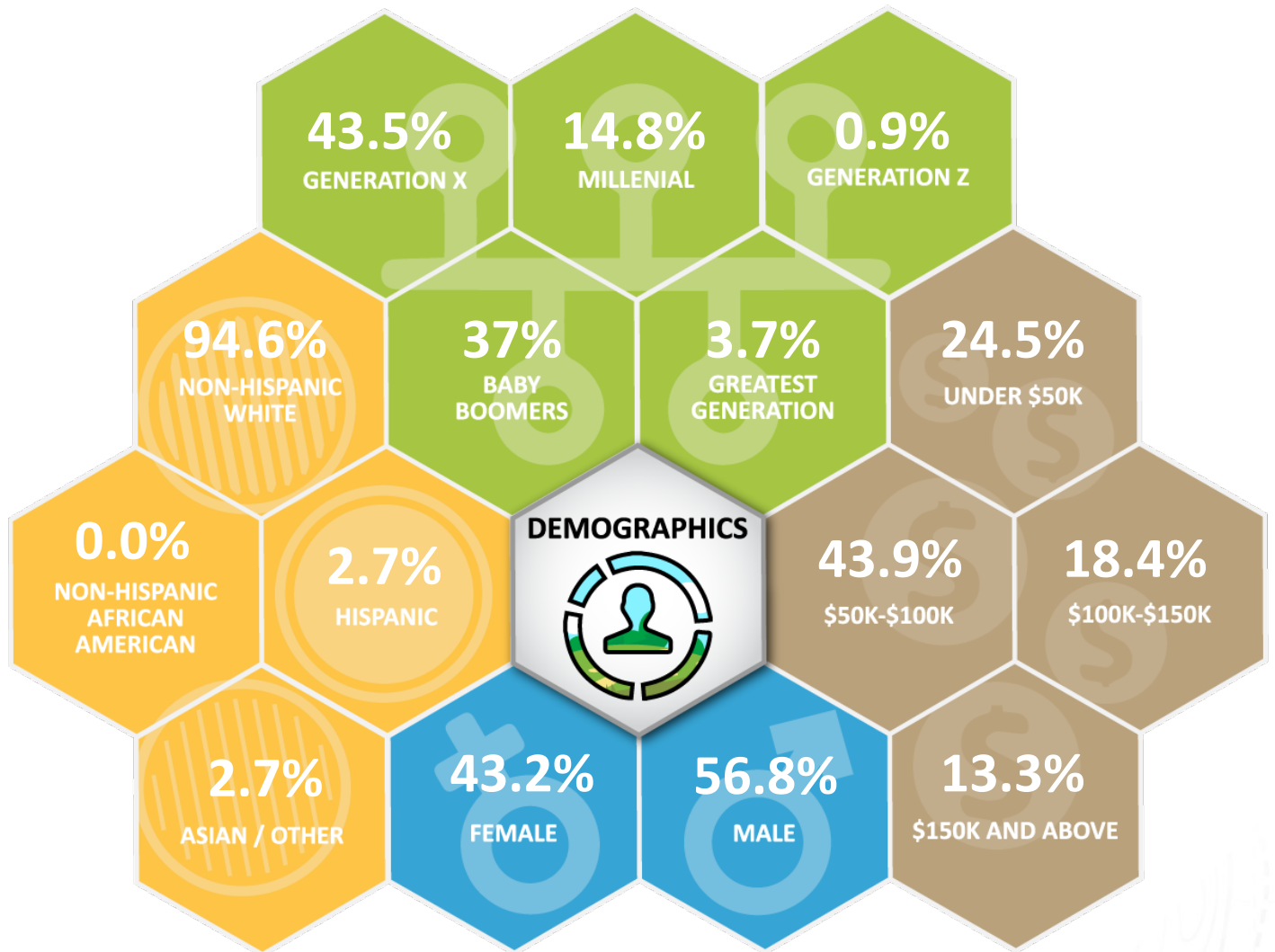


Webster State Park rated above average in all seven benefits included in the survey. The park was also viewed as having a value greater than its cost at a rate 2.9 percentage points higher than average by survey respondents. The three most common benefits to visitors at the park were viewing inspiring sights, decreased stress, and spending quality time with their family members. Visitors cited the park as improving their health at a rate 10.6 percentage points higher than the state average.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	93%	87%	100%
Viewed unique sights	83%	87%	88%
Helped Improve Overall Health	73%	83%	88%
Appreciation of nature	78%	81%	81%
Decreased stress	95%	91%	100%
Improved Quality time with Family	85%	87%	100%
Spent quality time with family	93%	96%	100%
Value greater than cost	98%	94%	94%

Source: CEDBR

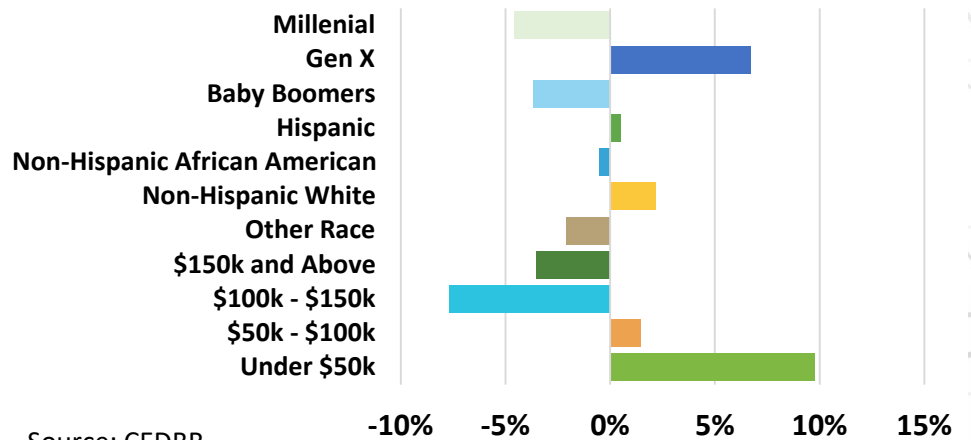




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Survey respondents who visited Webster State Park were, on average, 0.5 years older than those to the overall state park system. The park's share of respondents from the Millennial generation was the fifth-lowest of any Kansas state park, while the park had the second-highest share of members of Generation X, at 43.5 percent. Only 5.4 percent of the park's respondents identified as people of color, the fourth-lowest rate among state parks. The park had the second-highest share of respondents who earned less than \$100,000 annually, 68.4 percent.

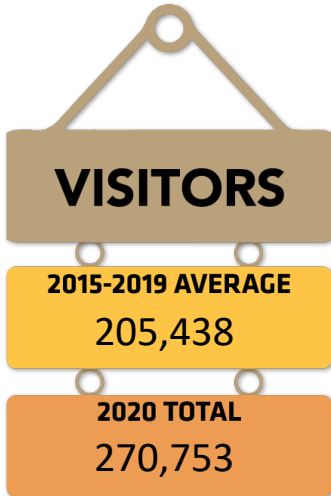
Park Visitor Demographics Relative to State Avg



Source: CEDBR

WILSON STATE PARK | RUSSELL COUNTY

Economic Impact



*Visitor Days











Kansas State Parks



	DIRECT	INDIRECT	INDUCED	TOTAL
LABOR	\$200,322	\$1,490,322	\$281,536	\$1,972,182
EMPLOYMENT	4	64	7	75
OUTPUT	\$170,872	\$2,733,184	\$1,038,294	\$3,942,354

Source: CEDBR

Economic Impact

PARK INDUSTRY CONTRIBUTION				
INDUSTRY		LABOR INCOME	EMPLOYMENT	OUTPUT
Agriculture		\$788	-	\$5,630
Mining		\$2,100	-	\$29,284
Construction		\$5,542	-	\$20,306
Manufacturing		\$7,537	-	\$87,719
TIPU		\$85,012	1	\$351,277
Trade		\$921,045	48	\$1,237,936
Service		\$928,037	26	\$2,133,651
Government		\$22,119	0	\$76,551
Total		\$1,972,182	75	\$3,942,354

Source: CEDBR

PARK TAX REVENUE					
	SALES	PROPERTY	OTHER PRODUCTION	HOUSEHOLDS	CORPORATIONS
Average	\$302,928	\$340,882	\$25,196	\$37,358	\$4,710
2020	\$873,040	\$1,164,490	\$64,249	\$101,105	\$12,576

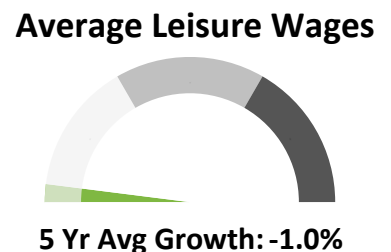
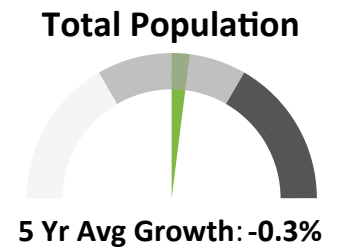
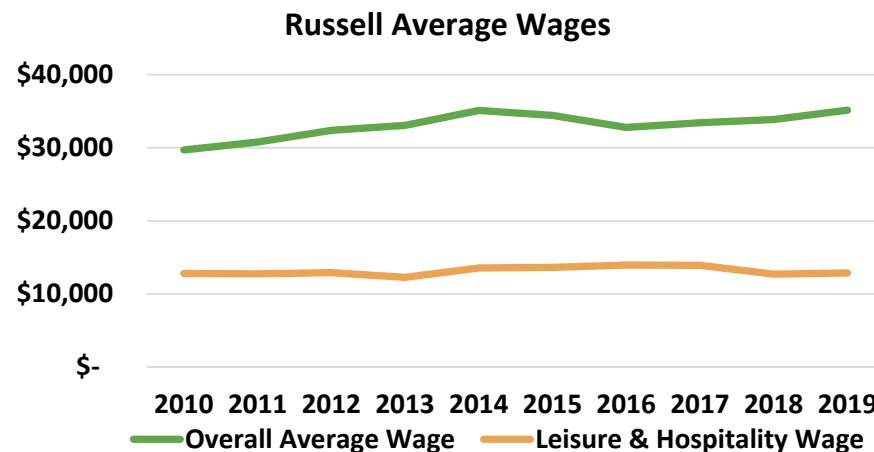
Source: CEDBR

PARK- REGIONAL				
	AVERAGE		2020	
	Local	State	Local	State
Labor	\$1,011,252	\$960,928	\$3,072,243	\$1,567,157
Employment	45	30	171	46
Output	\$1,932,131	\$2,010,221	\$7,429,402	\$3,574,262

Source: CEDBR

RUSSELL COUNTY					
	2018	2019	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ²
Total Population ¹	6,907	6,856	-0.7%	-0.3%	13
Total Employment	2,488	2,429	-2.4%	-3.4%	25
Leisure & Hospitality Employment	215	213	-0.9%	-4.2%	21
Leisure & Hospitality Share	8.6%	8.8%	0.1%	-0.8%	20
Average Annual Wage (All Industries)	\$33,867	\$35,135	3.7%	0.0%	26
Average Annual Wage (Leisure & Hosp)	\$12,708	\$12,885	1.4%	-1.0%	26
L&H Employment Location Quotient	0.92	0.94	1.6%	0.0%	0

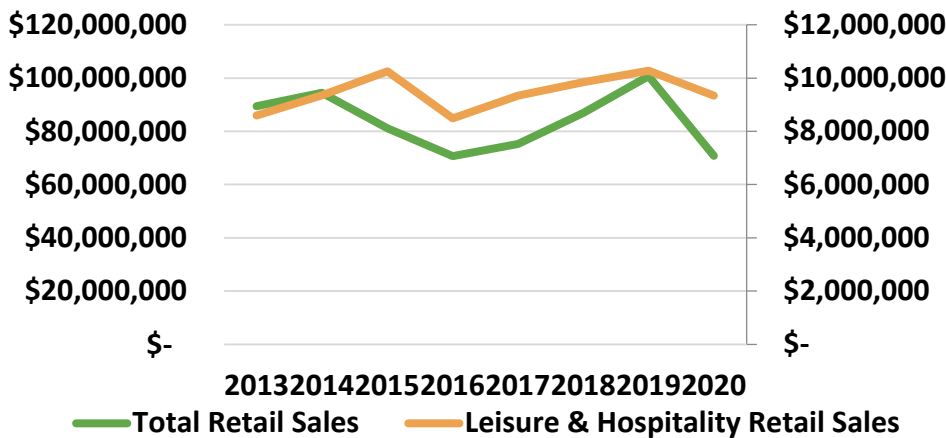
¹ Total Non-institutionalized population
² Ranking based on 26 state park areas
 Source: CEDBR, BLS - QCEW, Census - PEP



RUSSELL COUNTY					
	2019	2020	% CHANGE	5 YR AVG GROWTH	5 YR GROWTH RANK ¹
Total Taxable Retail Sales	\$100,758,438	\$70,762,939	-29.8%	-2.7%	24
Leisure & Hospitality Retail Sales	\$10,282,444	\$9,333,948	-9.2%	-1.9%	24
Per Capita Retail Sales	\$14,587.87	\$10,321.32	-29.2%	-2.4%	25
Per Capita L&H Retail Sales	\$1,488.70	\$1,361.43	-8.5%	-1.6%	24
County Pull Factor (All Sales)	0.86	0.98	14.2%	0.5%	5
County Pull Factor (L&H Sales)	0.76	0.81	7.1%	-1.1%	24

¹ Ranking based on 26 state park areas
 Source: CEDBR, Kansas Department of Revenue

Russell Retail Sales



Source: CEDBR & KS Dept of Revenue

Note: Leisure is on secondary axis

Wilson State Park’s market area declined in population slightly faster than the average state park market area, contracting an average of 0.3 percent annually from 2014 to 2019. The area’s employment contracted more rapidly in that time, declining by 3.4 percent annually, with a similar decrease in leisure and hospitality employment. Along with the employment declines, wages have also grown slower than the state average in recent years, with growth of less than 0.1 percent since 2014. Despite these declines, retail sales per capita increased and the county’s pull factors remained among the top half for state park market areas.

Total Taxable Retail Sales



5 Yr Avg Growth: -2.7%

Leisure Retail Sales



5 Yr Avg Growth: -1.9%

County Pull Factor (All)



5 Yr Avg Growth: 0.5%

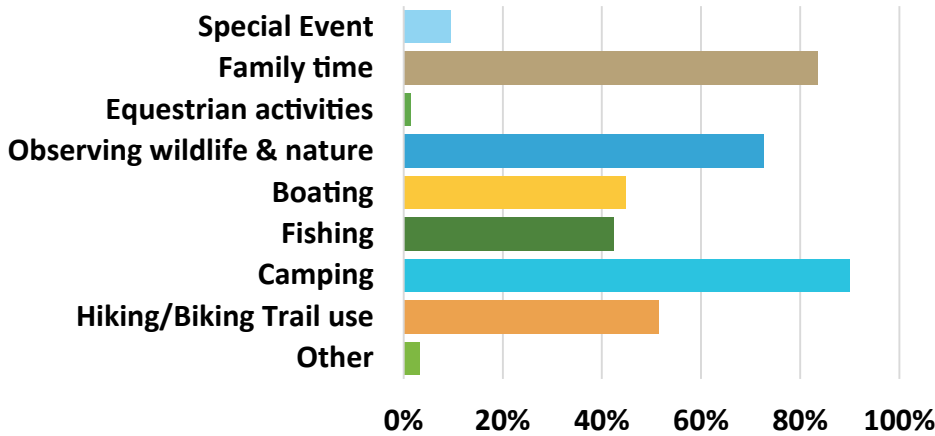
County Pull Factor (L&H)



5 Yr Avg Growth: -1.1%

Visitor Survey

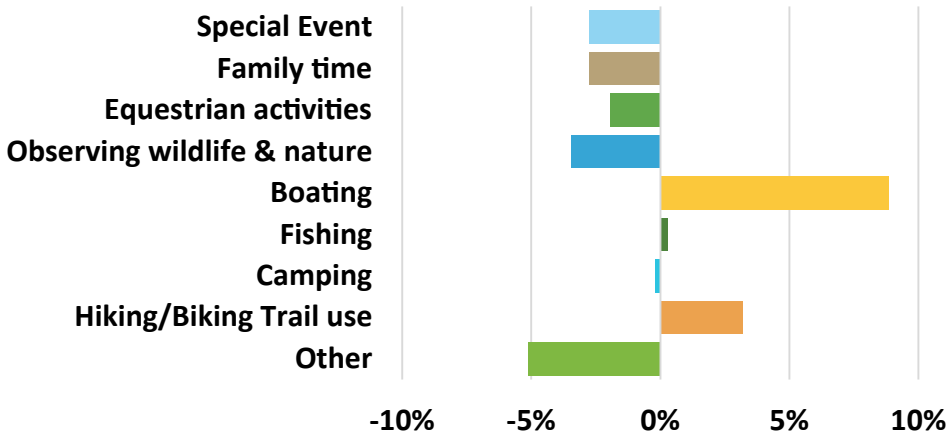
Park Visitor Activities



Source: CEDBR

Wilson State Park was one of only six state parks where survey respondents were more likely to engage in boating activities than fishing activities, with rates of 44.3 percent and 42.3 percent, respectively.

Park Visitor Activities Relative to State Avg



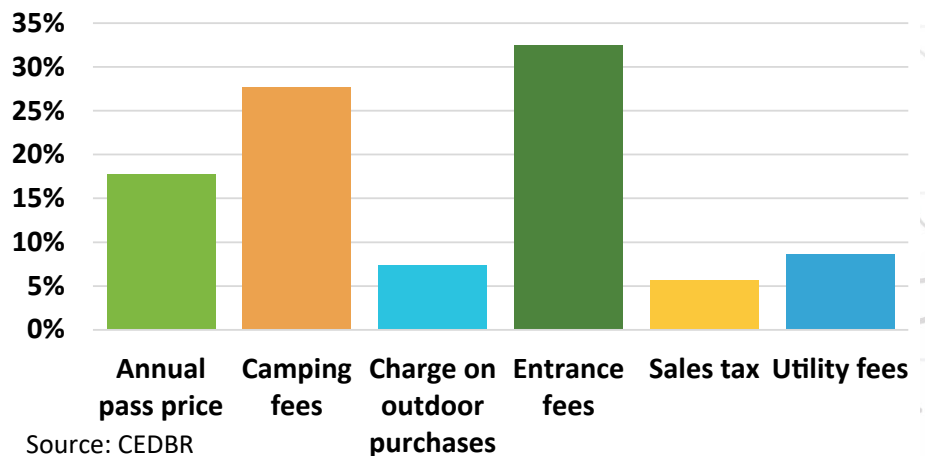
Source: CEDBR

The park also had above-average engagement with hiking activities, which were participated in by 51.5 percent of survey respondents on their last visit. Camping and family time were the two most popular activities at the park.

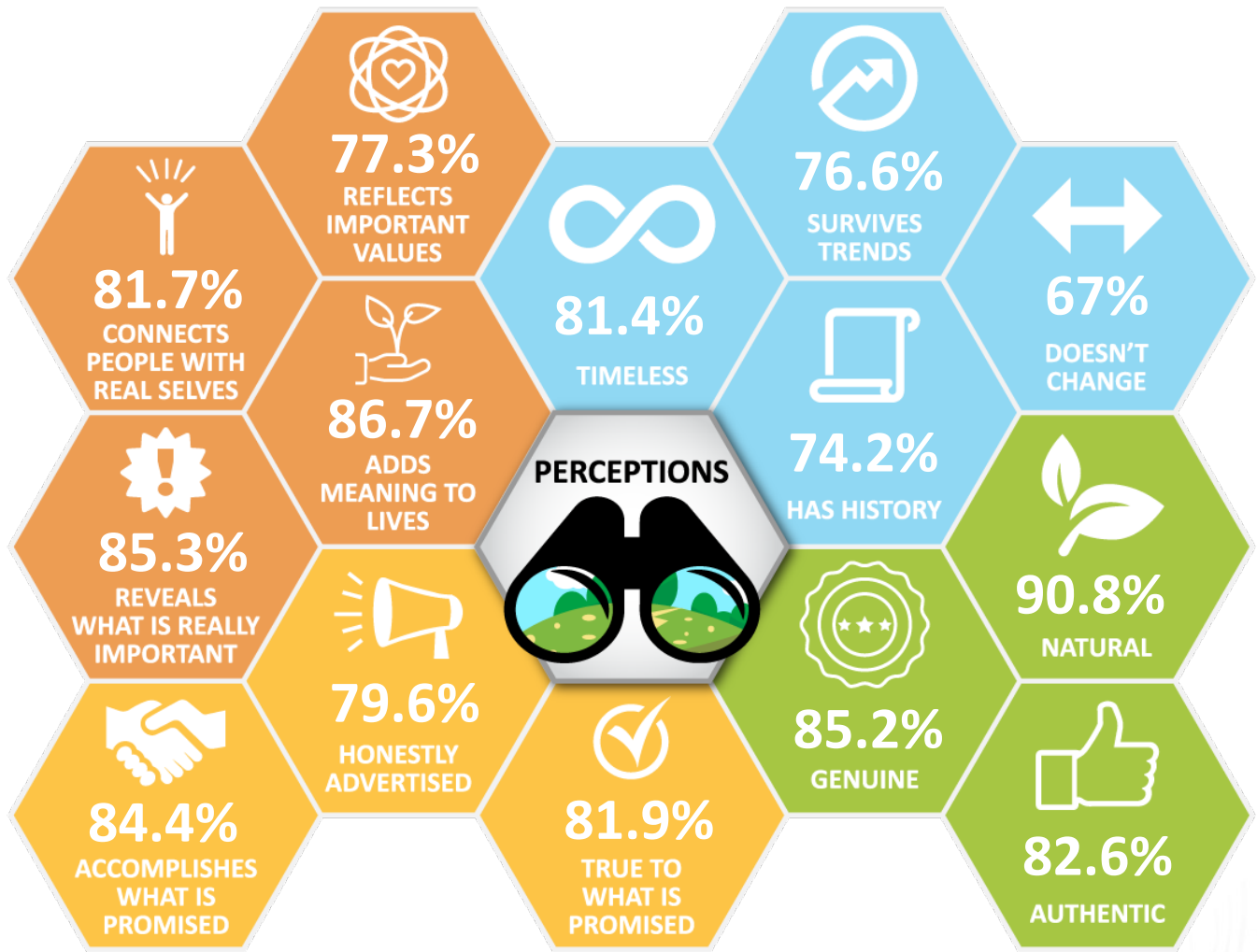
SUPPORT FOR INCREASED FEES



Park Preferred Fee Increase



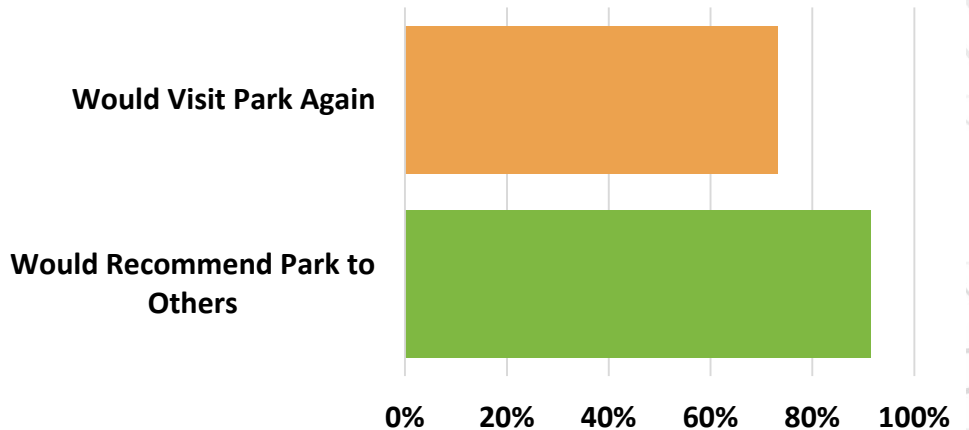
Source: CEDBR



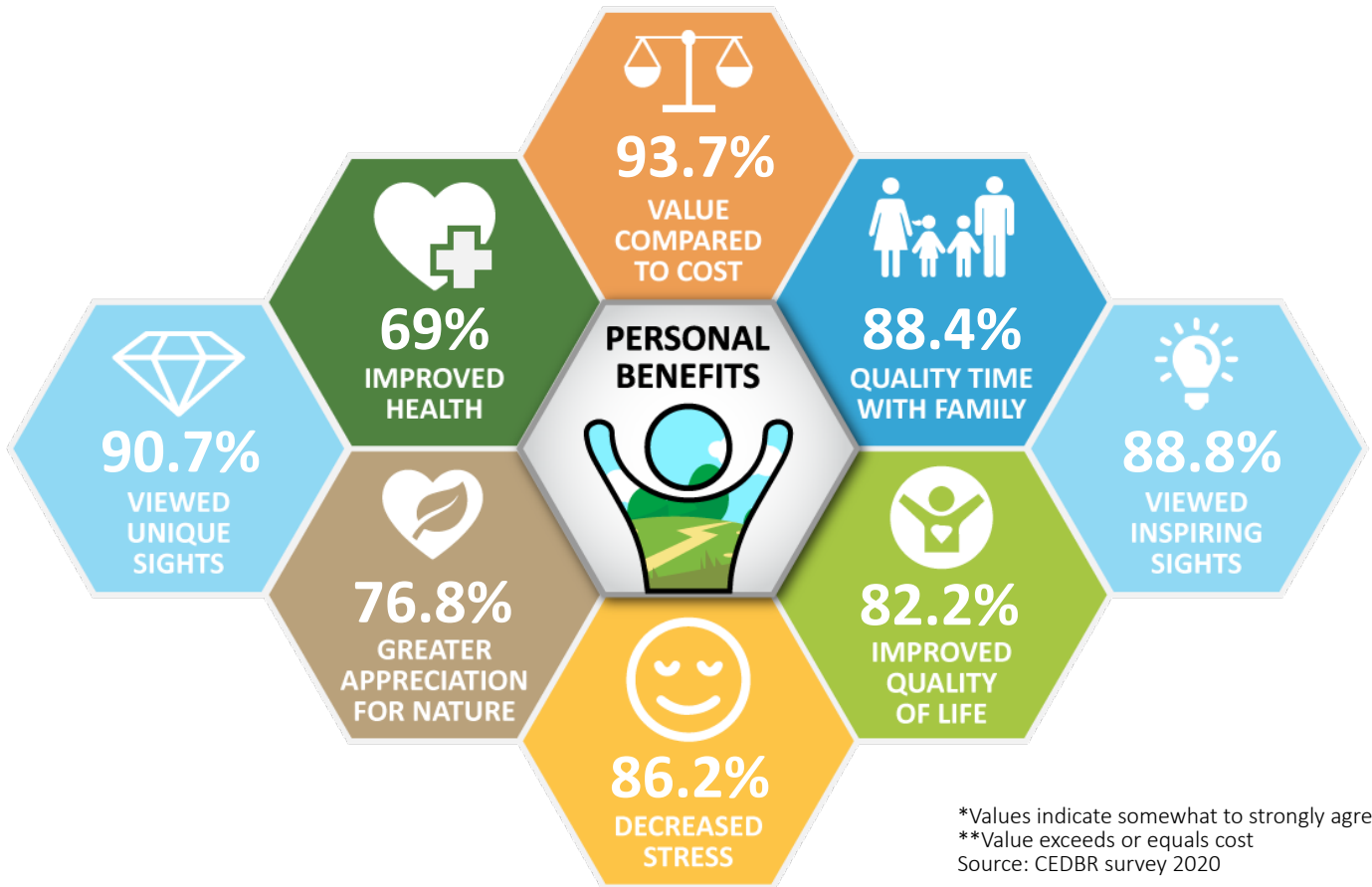
*Values indicate somewhat to strongly agree
 **N= 688
 Source: CEDBR survey 2020

Among survey respondents who visited Wilson State Park, 91.3 percent would recommend the park to other visitors, a rate only 0.6 percentage points below the average state park. The park was perceived the most above average as a place with history and a timeless place, both of which were agreed to a rate 5 or more percentage points higher than the average park.

Park Visitor Satisfaction



Source: CEDBR

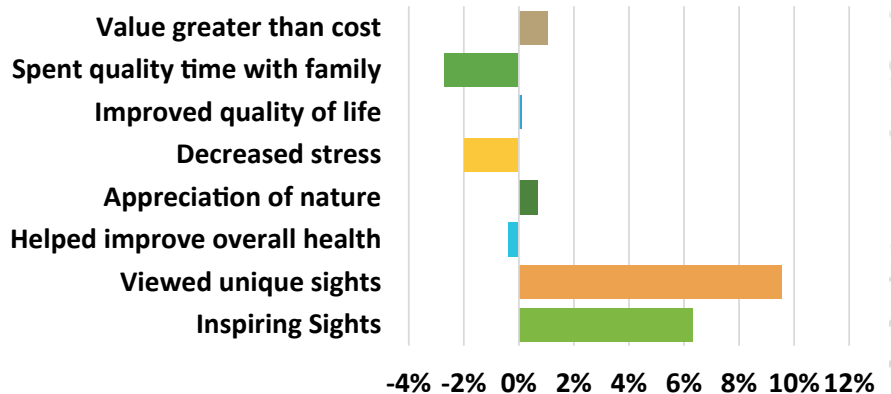


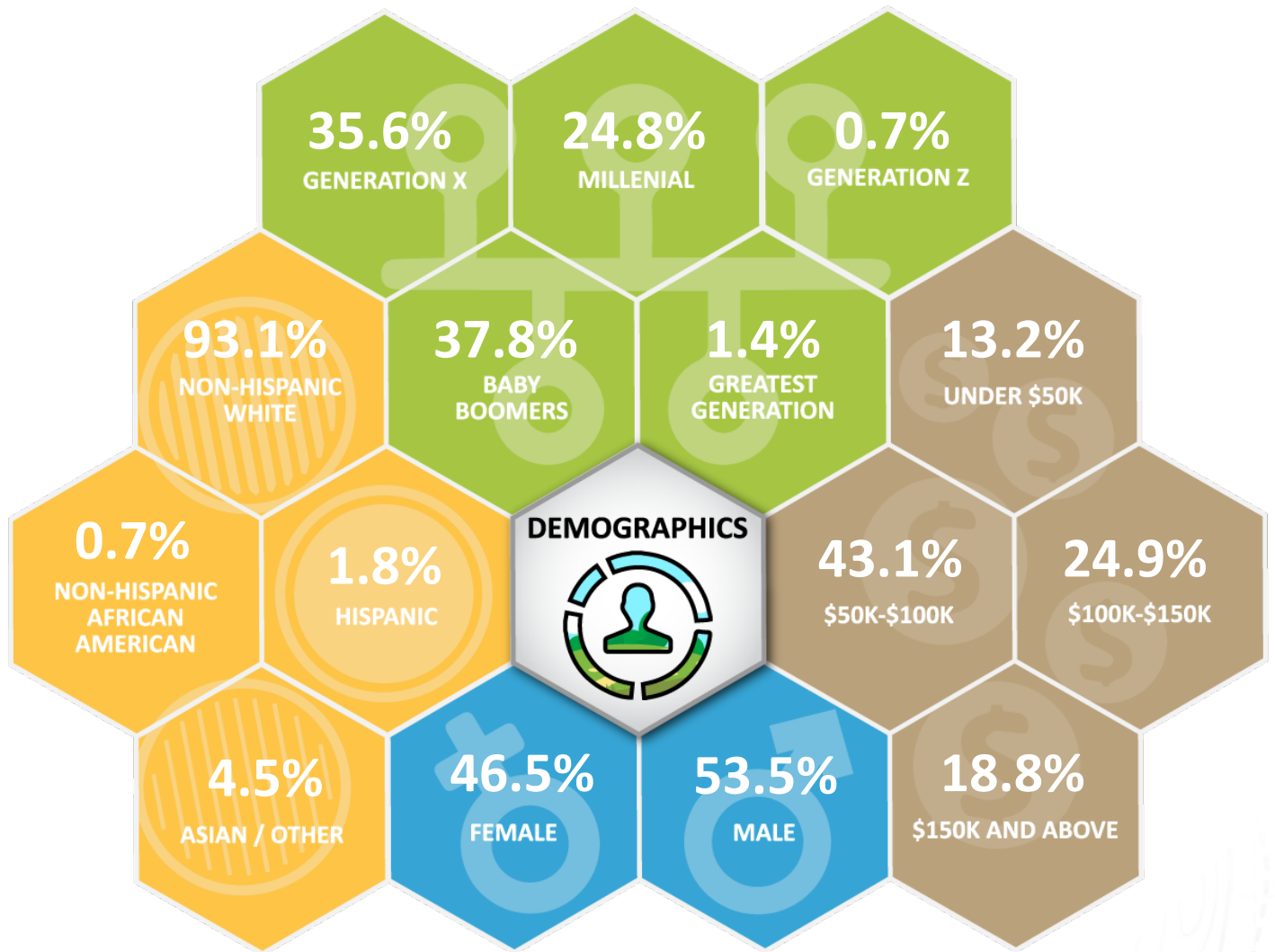
Among survey respondents who visited Wilson State Park, 93.7 percent viewed their visit as having more value than the cost, 1 percentage point above the state park system average. The park most over-performed in providing the benefits of inspiring sights and unique sights, which occurred at a rate of 6.3 and 9.5 percentage points higher than the state park system average. The park’s most common benefits to visitors were viewing unique sights, decreasing stress, and spending quality time with family.

PERSONAL BENEFITS BY GENERATION			
PERSONAL BENEFIT	B	X	M
Inspiring sights	86%	91%	94%
Viewed unique sights	88%	94%	94%
Helped Improve Overall Health	68%	75%	66%
Appreciation of nature	76%	80%	77%
Decreased stress	84%	89%	88%
Improved Quality time with Family	79%	86%	85%
Spent quality time with family	89%	91%	85%
Value greater than cost	91%	96%	96%

Source: CEDBR

Park Benefits Relative to State Avg

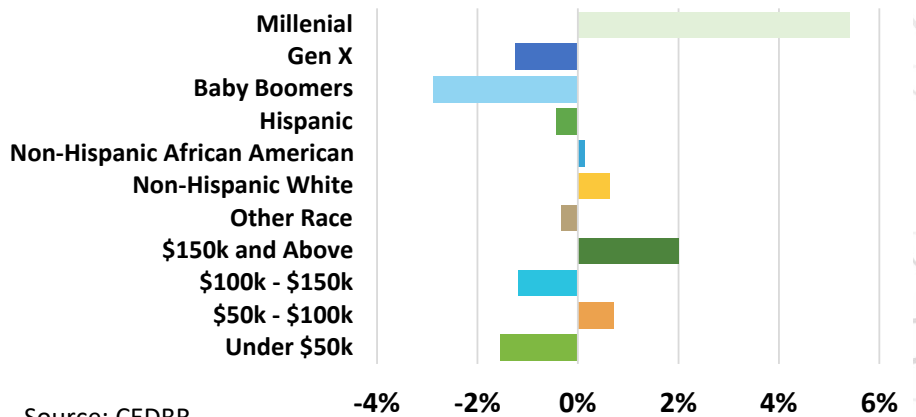




*Demographics were based on the purchaser and not the entire party.
Source: CEDBR survey 2020

Wilson State Park’s survey respondents tended to have higher incomes than average, with 43.7 percent earning more than \$100,000. The share of those earning more than \$150,000 was 18.8 percent, the fifth-highest of any Kansas state park. The park tended to attract younger visitors, with an average age 1.3 years younger than the average park. The park’s share of Millennials was 24.8 percent, which was the highest share of that generation at any Kansas state park. Among respondents, 6.9 percent identified as people of color, which was only 0.6 percentage points less than the overall park system average.

Park Visitor Demographics Relative to State Avg



Source: CEDBR

ACKNOWLEDGMENT

The following people were responsible for the successful completion of the impact study, which includes the surveys, data collection, and economic modeling.

At the Kansas State Parks, Director Linda Lanterman led the effort in data collection, survey review, and overall guidance on the project scope. Arlan Hair, Application Developer at the Kansas Department of Wildlife Parks & Tourism, served as the main point of contact to provide financial information. Both Linda and Arlan's experience, teamwork, and passion for the state park system made for a better project. The following people provided additional guidance and data:

Alan Stark, *Regional Supervisor*
Anthony Reitz, *Regional Supervisor*
Brenda Dean, *Administrative Specialist*
Cherie Riffey, *Grants Coordinator*
Jeffrey Bender, *Regional Supervisor*
Joyce Dixon, *Administrative Specialist*
Kati Westerhaus, *Grants Coordinator*
Lisa Boyles, *Administrative Specialist*
Mike Miller, *Assistant Secretary*
Steve Seibel, *Regional Supervisor*

Professor A. Lynn Matthews assisted the center with the guest survey design and development. She is an Assistant Professor at the W. Frank Barton School of Business at Wichita State University. Her contributions include adding the measurement tools for determining visitor's experience of authenticity, which aligns with her professional academic research.

At Wichita State University's Center for Economic Development and Business Research (CEDBR), Mike Busch served as Co-Principal Investigator for the project. He provided technical expertise, data collection, and analysis throughout the project. Anne Price, Graphic Design Consultant, led the design team and developed the graphics, while Andrea Wilson, Budget and Conference Administrator, laid out the page designs and added the content. Jeremy Hill, Director of CEDBR, served as the Co-Principal Investigator. He provided theoretical, technical expertise, survey development, and project management.

The Center for Business Research and Economic Development, a unit of the W. Frank Barton School of Business at Wichita State University, is responsible for any errors in this report. Inquiries may be directed to: Center for Business Research and Economic Development, 1845 Fairmount St, Wichita, KS 67260. The Center can be reached by telephone at 1-316-978-3225 or through the website at www.CEDBR.org.

METHODOLOGY

Visitor Spending Patterns and Survey

This project assumed that the spending patterns of state park visitors varied from other traditional tourism activities. To better capture spending patterns, this study surveyed all guests that reserved a site location at any of the state parks between April 1, 2020, and September 11, 2020. Although a guest may have stayed at a park more than once during the summer, they were only sent one survey invitation and were requested to respond to the most recent experience. The total number of qualified guests to complete the survey was 39,156, and the total number of respondents was 8,397, with a completion rate of 21.4 percent.

The distribution of the survey was by email. All qualified guests were sent an email on October 26, 2020. Follow-up emails were sent on November 2 and November 5 to only the visitors that had not responded to the previous emails. The number of survey responses varied by park, with smaller ones receiving proportionally less completed surveys. Due to the low number of responses to a few state parks, the spending patterns were averaged across the entire system; however, the study used variations in expenditures based on the type of activity. Since 2020 contributed to an unusual higher visitor demand due to COVID-19, this study created an average impact based on attendance between 2015 and 2019. Using the pre-pandemic average should be used only as a baseline. This study did not ask predictive questions on their future travel expectation. There are already signs that tourism travel has remained higher in 2021; however, it is too early to know if the level of aggregate demand has permanently shifted. Economic impacts were also created for 2020, which will allow a community to gauge how the growth added additional value to a regional economy.

The study does recognize that the surveyed population group did not capture spending patterns from day visitors or those that do not spend the night at a campsite or cabin. Creating an intercept survey was beyond the project's scope and too difficult to implement during the pandemic.

After reviewing the survey expenditure data, this study used a simplifying assumption that spending patterns collected would be used for both day and overnight visitors; however, for day visitors, both other lodging and all spending outside the forty-mile radius were removed. The effective visitor day expenditure (expenditures not spent at the state park) was reduced from \$22.42 to \$15.53, a 31% reduction. To further check for the reasonableness of that estimate, the study compared the average spending patterns with six other recent impact studies that used different approaches to measuring day and multi-day tourists. When accounting for inflation, the values generated here were in line with or below the other estimates.

Vendor Survey

The Kansas State Parks have minimal staffing and provide very little direct services to guests. Instead, the state parks depend on the private sector to provide enhanced services like fishing guides. The relationship with the vendors is symbiotic, and each gains value from the relationship. In order to measure the economic value and dependence of the vendors, a survey was developed similar to the structure of the visitor instrument.

To determine the population of the vendors to be surveyed, Kansas State Parks requested each park to provide a list of firms within their region along with contact information. Due to the limits of the project scope, this study only surveyed locations with an identified email address.

The state parks identified 382 firms with a qualified email address. The initial survey was sent on April 5, 2021. Follow-up reminders were sent on April 12 and April 14 to vendors that had not completed the questionnaire. In total, there were 96 completed responses with a response rate of 25 percent.

Impact Analysis and Modeling

There are two approaches to measuring the economic impact of this type of project: measuring net new or all economic activity. Measuring net new economic activity works best when adding a new business or facility, as both would be new to the regional economy. Measuring all economic activity works best when trying to understand the size and interaction of a project on a regional economy. Since the purpose of this study was to understand how the state parks impact the regional economies, all economic activity was included. This approach is called an economic contribution; however, the study will interchange this term with economic impact.

It is important to note that the state parks in Kansas provide a unique recreational activity that cannot easily be substituted. Although there are a few other campgrounds within Kansas, none are large enough or have natural amenities comparable with the state parks. Further, this study assumes that consumers of the state parks do not have an alternative-substitutable local tourism activity. Thus, if the state parks did not exist, the tourism consumption activity would likely shift to the next closest park, which would be a loss of revenue to businesses and governments within the region and state.

Based on the visitor demographic reports that the Kansas State Parks collected when guests register, seventy-nine percent of the orders were from people from Kansas. The total number of occupants from outside of the state, which includes the number of people in the party, was eighteen percent in 2019. Both are important in understanding the net new economic activity generated from the state-wide park system, as spending from outside of the state stimulates a regional economy.

The impact model used to estimate the economic impacts of Kansas State Parks on the regional and state economies was IMPLAN (Impact analysis for PLANning). IMPLAN is one of the most commonly used models for impacts similar to this project. Alternative models are less common in practice and tend to involve a higher level of customization. The advantage of using this model is that it is broadly available and uses straightforward methodologies. Others could replicate the study or even develop similar studies to provide reliability or comparability.

Double counting is a common weakness of contribution studies. It tends to occur by inputting two similar direct economic activities like salaries and employment or adding in an indirect effect on top of a direct effect. This study went to great lengths to prevent double-counting by using the Analysis-By-Part technique developed by IMPLAN. In particular, this study removed tourism spending that would flow to the Kansas State Park Revenue: entrance fees, camping, and cabin rentals.

In the development of the model and the preparation of analysis, CEDBR assumed, all information and data provided was and is accurate and reliable. CEDBR does not take extraordinary steps to verify or audit such information but relies on such information and data as provided for purposes of the project.

Activity Impacts

The study included impacts by type of tourism activity while at one of the state parks. Within the survey, guests were asked both their primary leisure interest and all related activities during their most recent stay. In order to measure the total economic contribution of an activity on the state economy, this report allocated the share of respondents for each activity, regardless if it was the primary activity. The value of this methodology is that it will allow a more complete picture, but the limitation is that the activities cannot be added together. Furthermore, adding them together will create double counting. Spending patterns in this section of the report vary from the overall impact, as certain activities like boating

and equestrian tend to be associated with higher expected expenditures compared to camping and hiking. This study did not include major purchases like an RV or boat. Also excluded from the spending patterns were event tickets, entrance fees, and cabin rentals.

Construction Impacts

Capital investments were not included in the total contribution impact, as the funding tends to be one-time expenditures and vary dramatically by year. Capital investments include expenditures on trail improvements, adding cabins, and other maintenance. Construction-related projects support temporary jobs, as the projects have a limited duration. The purchase of major equipment tends to leak out of small regional economies. For this reason, the accepted practice is to separate capital investments from the total contribution impact. At the state level, however, the Kansas State Parks regularly invests in the parks. Excluding these expenditures entirely would overly discount the value they provide. This study used the annual average spending between 2015 and 2020.

Employment and Wage Impacts

This study only captured the direct employment of employees within the Kansas State Park. Including only workers who work within the park system ensures no double-counting of employees and compensation. In other words, this study excluded employees that provide essential services for the parks, but also deliver similar services to other state agencies. Examples of these types of positions include accounting, attorneys, and technology support. While this method underestimates the value, it creates a minimum estimate to base the overall economic effect.

DEFINITIONS

- **Contribution impact** – A contribution impact study includes all activities associated with the event, including local visitors.
- **County pull factor** – Pull factors measures the relative strength of a community’s ability to attract retail shoppers by comparing the retail sales per person to the state per person level.
- **Direct impact** – A direct effect measures an industry’s initial change or value in terms of dollars, jobs, or wages. This study excluded jobs and wages of state government workers that provide essential but were not directly employed within the Kansas State Park division.
- **Indirect impact** – An indirect effect measures the supply chain impact from an initial change or direct impact.
- **Induced impact** – An induced impact measures the household effect from increased demand from an initial change or direct effects.
- **Labor income impact** – Labor income includes all forms of employment income and encompasses employee compensation and proprietor income.
- **Location quotient** – A location quotient measures an industry’s relative concentration.
- **Market area** – This study used two measures of a market area. A local market area was defined as 40 miles from a state park within the visitor and vendor surveys. Within the market research portion of the report, the market area included all counties that touched the state park.
- **Multiplier** – A multiplier captures the inter-industry effects from a change to a primary sector. A value greater than one indicates a positive impact on the economy for every dollar or job created.
- **Output impact** – An output effect measures the total value of a business’s production and equals revenues.
- **Per capita** – Per capita measures the average number per person.
- **Primary activity** – Primary activity only includes guests that indicated that was the reason for the trip. It excludes guests who participated in that activity but selected something else for the trip’s primary purpose.
- **Tax on corporations** – Corporation taxes include dividends and corporate profits.
- **Tax on households** – Household taxes include income, fines and fees, motor vehicle license, property, and fishing and hunting.
- **Tax on production** – Production taxes include sales, property, motor vehicle licenses, severance, other related taxes.
- **TIPU sector** – The TIPU sector includes transportation, information, and public utilities.
- **Total impact** – A total effect adds the direct, indirect, and induced effects to estimate the full impact on a regional economy.
- **Visitor days** – Visitor days measure all days associated with one person’s trip.



Default Question Block

Thank you for helping the Kansas Department of Wildlife, Parks and Tourism!

This survey will ask questions about the MOST RECENT trip that you took to a Kansas State Park in 2020. Participation is completely voluntary, and you can stop at any time. By submitting this form you are indicating that you have read the description of the study, and are over the age of 18.

Please indicate below which state park you visited on this trip.

How likely would you be to recommend this state park to other potential visitors?

Definitely would recommend (7)	6	5	Might or might not recommend (4)	3	2	Definitely would not recommend (1)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How likely or unlikely are you to visit this state park again in the next 12 months?

Definitely will visit (7)	6	5	Might or might not visit (4)	3	2	Definitely will not visit (1)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How many days did you stay at this Kansas State Park?

- One (daytrip)
- Two days, one night
- Three days, two nights
- Four days, three nights
- Five days, four nights
- Six days, five nights
- Seven days, six nights
- Between eight and fourteen days (seven and thirteen nights)
- Longer than fourteen days

APPENDIX (CONTINUED)

Which of the following activities did you engage in at this Kansas state park during your trip?

	Yes	No
Hiking/Biking Trail use	<input type="radio"/>	<input type="radio"/>
Camping	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>
Boating	<input type="radio"/>	<input type="radio"/>
Observing wildlife/being close to nature	<input type="radio"/>	<input type="radio"/>
Equestrian activities	<input type="radio"/>	<input type="radio"/>
Family time	<input type="radio"/>	<input type="radio"/>
Special Event	<input type="radio"/>	<input type="radio"/>
Other (archery, shooting sports, etc.)	<input type="radio"/>	<input type="radio"/>

Which of the following best describes your primary reason for visiting this Kansas state park?

- Hiking/Biking Trail use
- Camping
- Fishing
- Boating
- Observing wildlife/being close to nature
- Equestrian activities
- Family time
- Special Event
- Other (specify):

Now we're going to ask you some questions about how much you, and your immediate group that you traveled with, spent on your trip to this Kansas state park. For the purposes of this survey, your immediate group is defined as people for whom you paid the bills on this trip, or with whom you shared responsibility for paying bills of this trip (e.g. your family or close friends).

How many people (including yourself) were in your immediate group on this trip?

- 1 (just you)
- 2
- 3
- 4
- 5
- 6-10
- More than 10 people in your immediate group

APPENDIX (CONTINUED)

For each of the following categories, please indicate how much money YOU AND THE OTHER MEMBERS OF YOUR IMMEDIATE GROUP spent during your trip both in the local area of the state park, as well as in other Kansas locations. We appreciate your taking the time and effort to give us as accurate information as possible. Your accurate responses are very important to helping us inform and guide Kansas leaders in their decisions regarding state parks.

Please enter the amount you spent in each category using numeric responses only, without dollar signs. If you did not spend any money in a given category, please enter 0 for that category.

	Amount spent in the local area (within 40 miles of the park)	Additional amount spent elsewhere in Kansas
Admission fees to the park	<input type="text"/>	<input type="text"/>
Camping fees (cabins, site rentals)	<input type="text"/>	<input type="text"/>
Lodging (hotel, motel, and condos not within the park)	<input type="text"/>	<input type="text"/>
Restaurants and bars	<input type="text"/>	<input type="text"/>
Groceries	<input type="text"/>	<input type="text"/>
Transportation expenses (Gasoline and other)	<input type="text"/>	<input type="text"/>
Recreational equipment and supplies (tackle, hunting supplies, camping, etc.)	<input type="text"/>	<input type="text"/>
Shopping (clothes, souvenirs, etc.)	<input type="text"/>	<input type="text"/>
Activities (entertainment, recreation, museums)	<input type="text"/>	<input type="text"/>
Marinas	<input type="text"/>	<input type="text"/>
All other expenses	<input type="text"/>	<input type="text"/>

Have you invested in any of the following types of outdoor recreation equipment within the last twelve months for primary use at a Kansas state park?

	Yes	No
RV (new or used)	<input type="radio"/>	<input type="radio"/>
Camper	<input type="radio"/>	<input type="radio"/>
Boat	<input type="radio"/>	<input type="radio"/>
Jet Ski	<input type="radio"/>	<input type="radio"/>
Kayak/canoe	<input type="radio"/>	<input type="radio"/>

APPENDIX (CONTINUED)

	Yes	No
Bicycle	<input type="radio"/>	<input type="radio"/>
UTV/Golf Cart	<input type="radio"/>	<input type="radio"/>
Tents	<input type="radio"/>	<input type="radio"/>
Equestrian Equipment	<input type="radio"/>	<input type="radio"/>

Please indicate the extent to which you agree or disagree with the following statements:

The state park that I visited is...

	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
A place that doesn't change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with a history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that survives trends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
Genuine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Authentic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A timeless place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate the extent to which you agree or disagree with the following statements:

The state park that I visited is...

	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
Please answer "Somewhat disagree" to this statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that reflects important values people care about	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that accomplishes what it promises to visitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that is true to what it promises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree

APPENDIX (CONTINUED)

	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
A place that connects people with what is really important	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that connects people with their real selves	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that is described honestly in advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that adds meaning to people's lives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate the extent to which you agree or disagree with the following statements.

	Strongly Agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
I liked the peculiarities about this location's natural sights.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall appearance and impression of this location's natural sights inspired me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

People may obtain different personal benefits from visiting a state park. To what extent does each of the following describe your experiences in this trip?

	Describes completely (7)	(6)	(5)	Describes somewhat (4)	(3)	(2)	Does not describe at all (1)
Helped improve overall health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obtained a greater appreciation of nature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decreased stress	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved quality of life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spent quality time with family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input style="width: 150px; height: 15px;" type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

APPENDIX (CONTINUED)

Which of the following best describes the value you received compared to the costs of your visit to this state park?

- Value greatly exceeded the cost
- Value somewhat exceeded the cost
- Value was about equal to the cost
- Cost somewhat exceeded the value
- Cost greatly exceeded the value

Would you be willing to pay an increased fee for more and improved facilities at this state park?

- Yes
- No
- Don't know

If this state park implemented an increased fee to improve facilities, what form would you most prefer that fee to take?

- Entrance fees
- Camping fees
- Utility fees
- Annual pass price
- Sales tax
- Charge on outdoor related purchases

How many trips have you taken to ANY Kansas State Park within the last twelve months, including this one? Please include both daytrips and trips that included staying at least one night.

What is the typical number of nights you spent on these trips to Kansas State Parks? (If you only took daytrips, please enter 0.)

We're almost done. These last few questions are for classification purposes only.

What is your race/ethnicity? (Please select all that apply)

- Hispanic or Latino
- White
- Black / African American
- American Indian or Alaska Native
- Asian
- Native Hawaiian or Pacific Islander
- Other (specify)

APPENDIX (CONTINUED)

Please indicate your gender.

- Male
- Female
- Other

What is your annual household income?

- Less than \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 or more
- Don't know
- Prefer not to state

Is your annual household income more or less than \$100,000 per year?

- Less than \$100,000 per year
- \$100,000 or more per year
- Don't know
- Prefer not to state

In what year were you born? (YYYY)

That's all the questions we have for you today. Thank you again for your time and your help!

Powered by Qualtrics

Open

This survey will ask questions about the impact of the state parks and the 2020 tourism season on your business. Participation is entirely voluntary, and you can stop at any time. By submitting this form, you indicate that you have read the study's description and are over the age of 18.

Did your business provide any products or services to a state park or guest in 2020?

- Yes
- No

How important are the following state park services on your annual revenue?

	Extremely important	Very important	Moderately important	Slightly important	Not at all important
Hiking/biking trail use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Camping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Observing wildlife/being close to nature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equestrian activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (archery, shooting sports, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Arrange the following from most important to least important, as each relates to your annual revenue?

- Hiking/biking trail use _____
- Family time _____
- Boating _____
- Equestrian activities _____
- Fishing _____
- Camping _____
- Special event _____
- Other (archery, shooting sports, etc.) _____
- Observing wildlife/being close to nature _____

Block 1

How were your business's operations impacted by COVID-19 (check all that apply)

- We closed our physical place of business

APPENDIX (CONTINUED)

- We closed our physical place of business
- We adjusted our hours of operation
- Our supply chain was interrupted
- We experienced increased sales
- We experienced decreased sales
- The market caused us to draw on our line of credit
- Other

Which of the following best describes your actual or expected revenue for the following time periods?

	Increased greatly	Increased slightly	Stayed the same	Decreased slightly	Decreased greatly	Does not apply
2010 to 2019	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2019 to 2020	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2020 to 2021	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Block 2

Do you support an increased fee for more and improved facilities at the Kansas State Parks?

- Yes
- Maybe
- No
- Don't know

If there was an increased fee to improve state park facilities, what form would you most prefer that fee to take?

- Entrance fees
- Camping fees
- Utility fees
- Annual pass price
- Sales tax
- Charge on outdoor-related purchases

Which of the following best describes your business's revenue dependence on the state parks?

- Very important
- Important
- Moderately important
- Slightly important
- Not important

If one or all of the state parks closed, which of the following best describes the impact on your business? (Check all that apply)

- Relocate/ shift business

- Close the business
- Minor downsize of operations
- Major downsize of operations
- Continue normal operations
- Does not apply

Block 3

We're almost done. These last few questions are for classification purposes only.

Which of the following best describes your primary business activity?

- Service (e.g. meat processing, boat repair, and storage)
- Marina
- Convenience store / gasoline station
- Retail (e.g. except convenience store)
- Restaurant
- Lodging (e.g. hotel and RV park)
- Entertainment (e.g. bowling and guide services)
- Other

How is your business owned and managed?

- Independent enterprise/family owned
- Part of a national chain
- Public sector/local authority
- Charity or not for profit
- Other

Which of the following best describes the proximity of your business to a state park?

- On-site
- Near a state park (within 10 miles)
- Within Kansas, not within 10 miles
- Does not apply

How many employees (part-time, full-time, and owner) are at your establishment?

How many years has your establishment been in operation?



2021

KANSAS STATE PARKS

Economic Contributions to Regional and State Economies