MISSOURI STATE PARKS

Katy Trail Visitor and Economic Impact Report

May 2026

School of Natural Resources
University of Missouri

MISSOURI DEPARTMENT OF NATURAL RESOURCES

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Executive Summary

The Missouri Katy Trail is the nation's longest continuous rail-trail, stretching approximately 240 miles across the state. The trail supports bicycling, walking, and long-distance touring while also driving tourism and local economic activity. This report presents findings from a 2025 visitor survey and economic impact analysis conducted by the University of Missouri in partnership with Missouri State Parks to better understand Katy Trail users, quantify economic contributions, and inform future planning.

Survey Findings

The findings are based on a statewide visitor survey administered between October and December 2025. A total of 1,841 usable responses were collected, including 392 respondents who identified the Katy Trail as their most recent Missouri State Park visit. This report focuses on those Katy Trail responses.

- **Local and Destination Use:** The Katy Trail serves as both a local recreation resource and a destination for longer-distance travel. About 90% of visitors are Missouri residents, with most coming from ZIP codes concentrated along the trail corridor, particularly among day users. Most visitors (61%) travel less than 30 miles, while more than 20% travel over 60 miles. Overnight users are more geographically dispersed, highlighting the trail's statewide and regional draw.

- **Visitor Profile:** Users tend to be older, highly educated, and relatively affluent. More than half are age 60+, 76% hold at least a bachelor's degree, and most report household incomes between $50,000 and $150,000. Respondents are predominantly White (97%) and female (59%).

- **Visitation Patterns:** Visitors report frequent use, averaging nearly 25 days per year, with peak visitation in summer (9.5 days) and fall (8.2 days). The trail is the primary purpose of most trips (89%). Three out of four visits are day trips, while overnight trips involve longer travel, greater mileage, and more activities.

- **Activities and Travel Behavior:** Bicycling is the dominant activity, followed by walking, hiking, running, and wildlife viewing. Conventional bicycles are most common, though nearly one in five visitors use e-bikes (electric), reflecting a growing trend with safety implications. Most trips are out-and-back, although one-way trips are more common among overnight users and cover substantially longer distances.

- **Community Engagement:** Most non-local visitors dine at community restaurants, with many also visiting wineries or breweries, historical attractions, shops, and events. Participation in these activities is higher among overnight visitors.

- **Perceived Benefits:** Respondents overwhelmingly report strong public benefits, especially for recreation, mental and physical health, and overall well-being, along with support for conservation. Economic benefits such as tax revenue and real estate value are rated slightly lower but still positive.

- **User Feedback and Priorities:** Open-ended responses highlight strong appreciation for the trail's health, community, and economic benefits. The most common theme was support for completing the Rock Island Trail. Other priorities include maintenance, restroom and water access, lodging, and addressing e-bike safety and trail etiquette.

Katy Trail Economic Impact

The economic impact of the Katy Trail State Park is driven largely by visitor spending. Trail users support local businesses when they dine at restaurants, stay overnight in nearby lodging, and shop in surrounding communities. In addition to these trip-related expenditures, Katy Trail visitors also purchase bicycles, sporting goods, and other equipment throughout the year for use in Missouri state parks, generating additional economic activity across the state. Key drivers and impact findings are summarized below.

- Katy Trail day-trip visitors spent an average of $46 per day, with restaurants accounting for roughly half of total expenditures. Groceries, transportation, and retail shopping also accounted for significant spending by day-trip trail users.

- Overnight visitors to the Katy Trail spent substantially more, averaging $148 per day. Lodging was the largest spending category at $67 per day, reflecting overnight visitors' reliance on hotels and short-term rentals rather than the campsites more commonly available at other state parks. Restaurant spending was also notable, exceeding $34 per day.

- More than 366,100 people visited the Katy Trail in 2025, and their spending contributed significantly to the state's economy. Using average spending patterns from the visitor survey, people traveling to visit the trail are estimated to have spent $24.6 million in 2025. After accounting for the ripple effects of supply-chain and worker purchases, that activity supported 261 jobs, generated $12 million in labor income, contributed $20 million to gross domestic product (GDP), and produced over $35.8 million in total state sales.

- Katy Trail visitor households spent an average of $920 annually on items such as bicycles, camping gear, and clothing intended for state park use.

- When scaled to all Katy Trail visitors in 2025, household purchases related to state park use are estimated to have totaled $4.7 million. Because some of this spending occurs outside Missouri or leaks out of state, a smaller portion is captured by Missouri businesses. After accounting for the ripple effects of additional spending and imports, those expenditures supported 38 jobs, generated $1.2 million in labor income, contributed $2.3 million to state GDP, and produced nearly $3.3 million in total sales to Missouri businesses.

- Beyond direct visitor spending, trails are associated with broader community growth, real estate, and health benefits, including stronger population and employment trends, increased property values, and improved physical and mental health outcomes. These effects are not fully captured in this analysis but represent important additional value to communities and the state.

- The combination of Katy Trail State Park visitors' spending and related household annual expenditures contributed significantly to the state's economy in 2025. As shown in Table 1, the Katy Trail supported nearly 300 jobs, generated $13 million in labor income, contributed $23 million in GDP, and produced $39 million in sales to Missouri businesses.

Table 1. Katy Trail State Park visitor spending and household purchases economic impact	**Employment**	**Labor Income**	**GDP**	**Total Sales**
Visitor spending	261	$11,914,172	$20,211,368	$35,794,494
Household park-use purchases	38	$1,223,495	$2,345,494	$3,275,820
Total impact	**299**	**$13,137,667**	**$22,556,862**	**$39,070,314**

Recommendations

The following recommendations are detailed in the report:

- Promote and expand overnight and multi-day visitation to increase economic impact.
- Strengthen local access and day-use experience.
- Strengthen trail town integration and enhance local business and visitor services.
- Maintain and enhance trail infrastructure to support cycling and system connectivity.
- Strengthen communication of economic, health, and community benefits.
- Enhance interpretive and educational experiences in support of natural character and stewardship.
- Enhance data collection, sampling approaches, and analysis to better capture representative, year-round, and spatial visitation patterns.
- Expand research to quantify broader economic and social benefits of trails.

Conclusion

The Katy Trail is a highly valued public resource and significant economic driver for Missouri, supporting local businesses, jobs, and community vitality. It generates substantial economic value and offers opportunities for further growth through expanded visitation, partnerships, and continued investment, positioning it as a key asset for the state's long-term development.

I. Introduction

Missouri State Parks

The Missouri State Parks system encompasses 57 state parks and 36 historic sites, totaling more than 150,000 acres. These sites provide residents and visitors access to diverse natural landscapes, cultural resources, and recreational opportunities, including over 1,000 miles of trails, extensive camping facilities, and the nationally renowned Katy Trail.

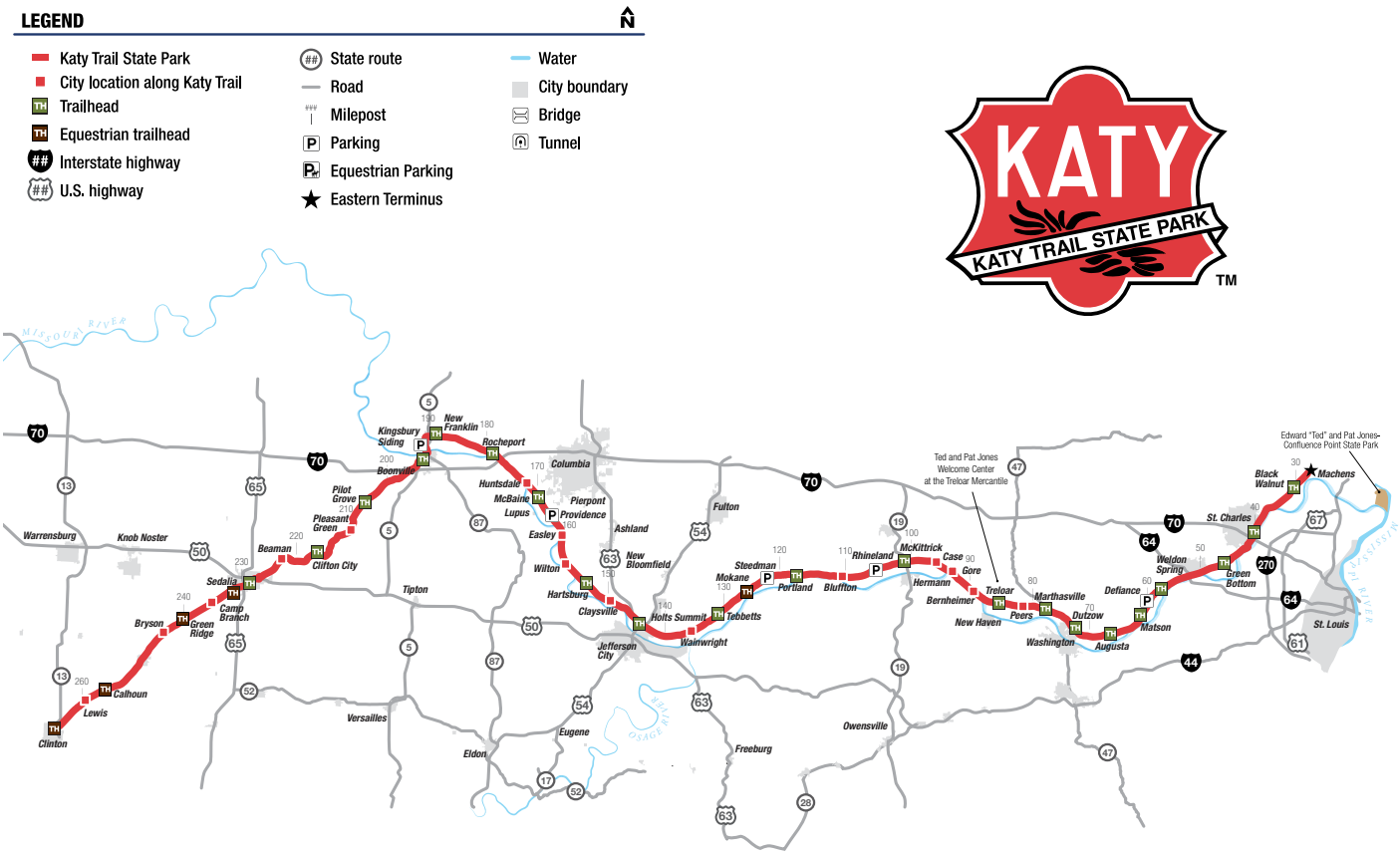
Missouri's state parks and historic sites provide public benefits to state residents and out-of-state visitors, including free access to outdoor recreation, preservation of natural and cultural heritage, educational opportunities, and enhanced quality of life through spaces that support health, tourism, and community well-being.

Missouri's Katy Trail

The Missouri Katy Trail is the nation's longest continuous rail-trail, stretching approximately 240 miles across the state, following the former Missouri–Kansas–Texas (MKT) Railroad corridor and offering scenic views along the Missouri River, forests, prairies, and historic small towns. Averaging nearly 422,000 users over the past three years,[1,2] the trail remains one of the country's most significant and celebrated rail-to-trail projects.

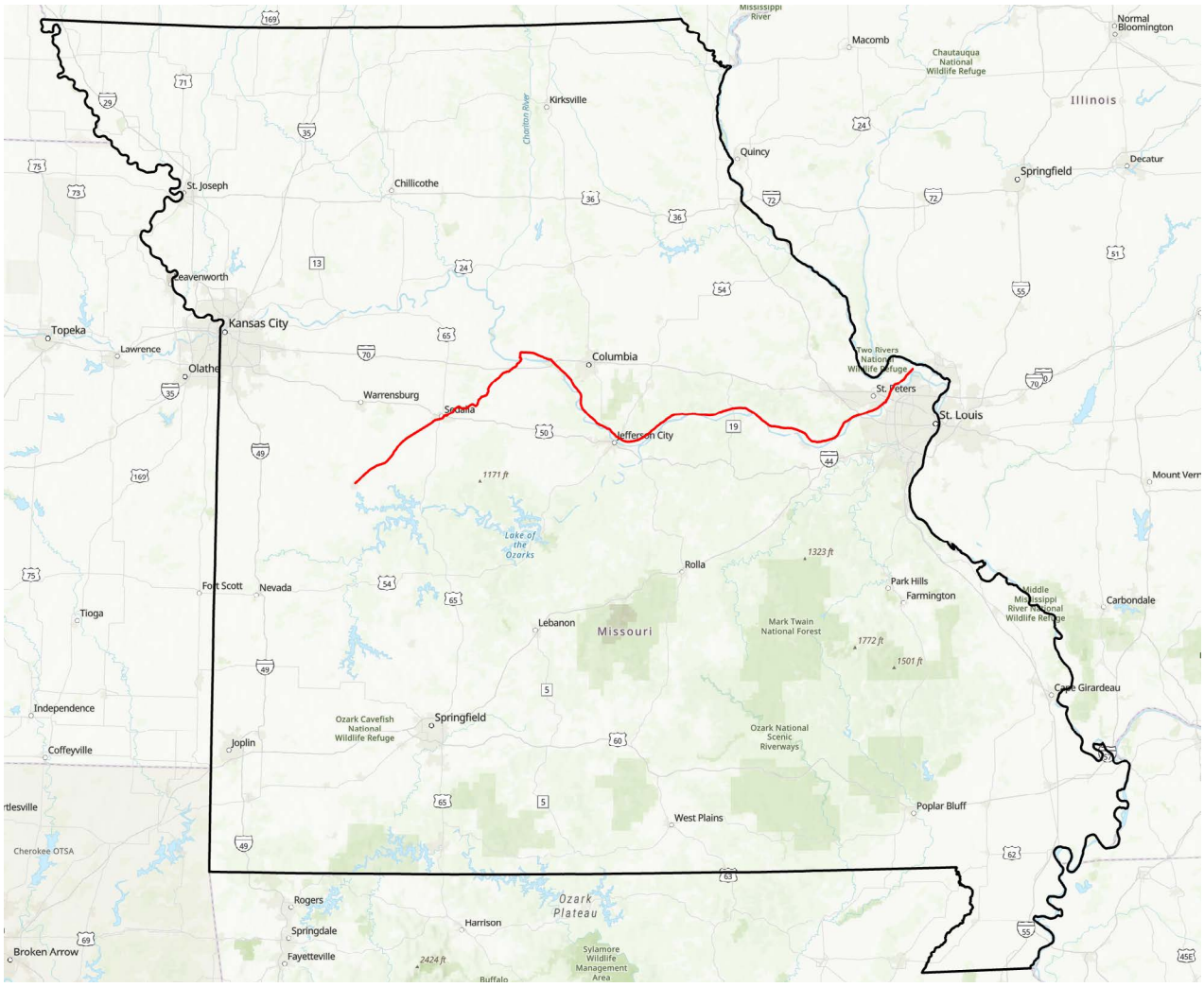
Katy Trail upgrades and infrastructure investments over the past 15 years have included a newly constructed bridge west of Mokane (opened in 2024) and enhanced rest areas such as the High Point shelter near Windsor. The Rock Island Trail is also a future 144-mile expansion that will connect with the Katy Trail to form a nearly 450-mile statewide loop, eventually linking dozens more communities and extending long-distance recreation opportunities further across the state.

Figure 1: Katy Trail State Park Map



[1] Missouri Department of Natural Resources. (2026, February). Missouri State Park Attendance. For January–December 2025. As compared to the same period in 2024.
[2] Missouri Department of Natural Resources. (2025, February). Missouri State Park Attendance. For January–December 2024. As compared to the same period in 2023.

Figure 2: Missouri Map with Katy Trail Highlighted



Purpose

Missouri State Parks and the Katy Trail play a vital role in strengthening local businesses, tourism, and surrounding communities. By attracting nearly 20 million visitors annually[1,2], they generate local economic activity through spending on lodging, dining, retail, and recreation services, helping to sustain and revitalize communities across the state.

In 2025, Missouri State Parks undertook an effort to assess visitor experiences and to evaluate the economic impacts of these resources. A key objective of this project was to estimate the unique contributions of the Katy Trail within the broader park system.

Missouri State Parks contracted with the University of Missouri's School of Natural Resources (SNR), in partnership with the MU Exceed program (Exceed) and the Assessment Resource Center (ARC), to conduct this visitor and economic impact analysis. SNR led the project design, conducted data analysis, oversaw report development, and provided project guidance in close collaboration with Missouri State Parks. Exceed contributed to the project design and conducted the economic impact analysis. ARC supported survey development, recruitment materials, data visualization, and report content.

The statewide visitor survey generated data for two economic impact reports: one for the Missouri State Parks system overall *(Missouri State Parks System Visitor and Economic Impact Report)* and one focused specifically on the Katy Trail. This report presents the Katy Trail findings. Its purpose is to help Missouri State Parks better understand trail users' needs and behaviors and to communicate the trail's impact and value to stakeholders statewide.

II. Methods

Data Collection

Data were collected to support both a Missouri State Parks system-wide economic impact assessment and a Katy Trail-specific analysis using a single, integrated survey instrument. The online Qualtrics survey was administered between October 20 and December 10, 2025.

Participants were recruited through multiple channels to reach a broad cross-section of visitors. The survey link was distributed via Missouri State Parks' social media platforms, email newsletter lists, and a Missouri Department of Natural Resources (DNR) news release that was picked up by several media outlets. In addition, posters with QR codes linking directly to the survey were posted at state parks and historic sites, allowing visitors to complete the survey onsite. The project team also conducted in-person intercepts at various Katy Trail locations, where visitors were invited to participate by scanning a QR code on a flyer.

The survey instrument was adapted from previous economic impact tools for Missouri State Parks and the Katy Trail and recent Missouri tourism and outdoor recreation analyses.[3,4,5] All respondents completed a core set of questions designed to support the statewide analysis, including items on trip characteristics (e.g., seasonal visit patterns, trip purpose, activity participation, travel distance, length of stay, and group size), expenditures across multiple categories, perceived public benefits of state parks and historic sites, and demographic characteristics. Respondents were also given the opportunity to provide open-ended comments.

Respondents who indicated that the Katy Trail was their most recent state park visit were presented with an additional set of questions specific to the Katy Trail. These items collected more detailed information on trail use, including trip characteristics specific to the trail, mode of travel, and mileage. This approach enabled the integration of Katy Trail insights within the broader statewide dataset.

Online data collection concluded in December 2025, and responses from all recruitment modes were combined for analysis. Descriptive analyses were conducted to characterize visitors and summarize their trip characteristics. Visitor expenditure data were used to calculate average spending per visitor across categories. Extreme outlier responses were excluded from the summary statistics to reduce the influence of atypical values.

For the Katy Trail analysis, only respondents who identified the Katy Trail as their most recent state park visit were included.

Responses

A total of 1,841 usable survey responses were collected. Of these, 21% (n=392) reported that their most recent visit was to the Katy Trail, while 79% (n=1,449) reported visiting another Missouri state park or historic site. This report is based solely on responses from Katy Trail visitors.

[3] DJ Case & Associates. (2012, May). *Missouri State Park economics and benefits: An update based on 2011 visitation.* Missouri Department of Natural Resources, Division of State Parks.
[4] Synergy Group, Pragmatic Research, Inc., & James Pona Associates. (2012, July 30). *Katy Trail economic impact report: Visitors and MGM2 economic impact analysis.* Missouri Department of Natural Resources, Division of State Parks.
[5] MU Exceed Regional Economic & Entrepreneurial Development. (2022, December 6). *Missouri economy indicators: Outdoor recreation* (Vol. 3, Issue 15). University of Missouri.

Figure 3: Type of state park/historic site visited most recently (N=1,841)

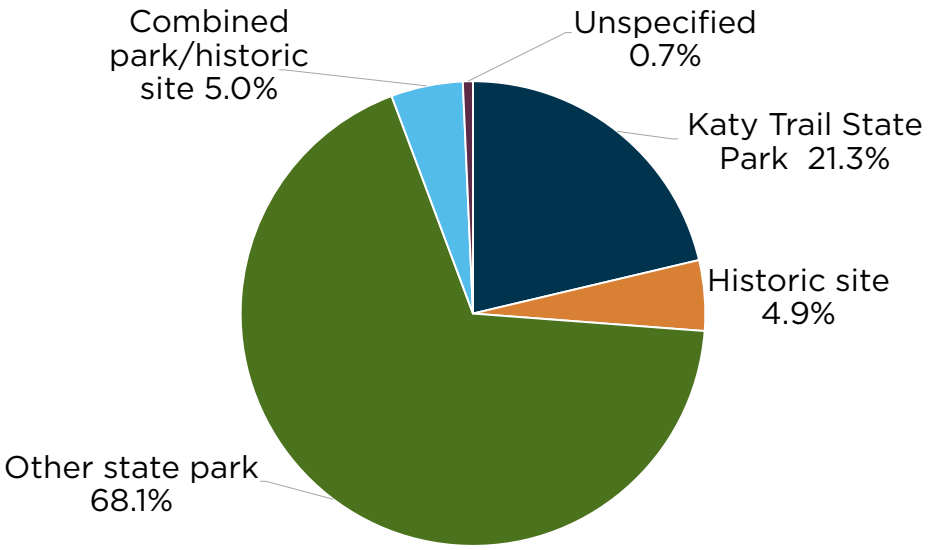


Table 2: State park/historic site most recently visited (N=1,841)	Number	Percent
Katy Trail State Park	392	21.3%
Other state park	1,253	68.1%
Historic site	90	4.9%
Combined park/historic site	93	5.0%
Unspecified	13	0.7%

The largest proportion of respondents reported that their most recent visit to the Katy Trail occurred during Fall 2025, likely reflecting the timing of the survey administration (October-December 2025). To assess potential seasonal bias, analyses comparing expenditure variables found no significant differences in average spending between fall and summer visitors.

Table 3: Most recent visit to Katy Trail (N=360)	Number	Percent
Today	49	13.6%
Fall 2025	213	59.2%
Summer 2025	65	18.1%
Spring 2025	12	3.3%
Winter 2024/2025	3	0.8%
November 2024 or earlier	18	5.0%

III. Survey Results

Demographics

A total of 392 survey respondents indicated that their most recent Missouri State Park visit was to the Katy Trail. The following summarizes key demographic characteristics of these visitors.

Missouri vs. out-of-state visitors. Based on reported home ZIP codes, most respondents were Missouri residents (90.6%), while 9.4% were out-of-state. Among Missouri respondents, ZIP codes represented 107 unique locations across the state. The geographic distribution of respondents is illustrated in the accompanying map, which shows concentrations of visitors along the Katy Trail corridor and surrounding regions.

Figure 4: Visitors from Missouri vs. out of state (N=255)

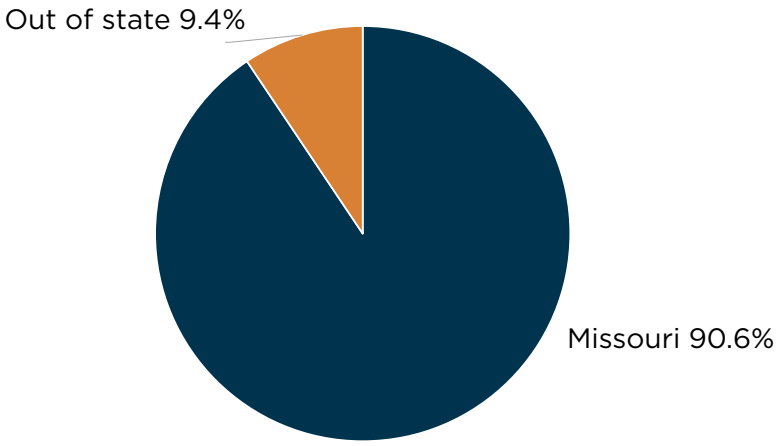
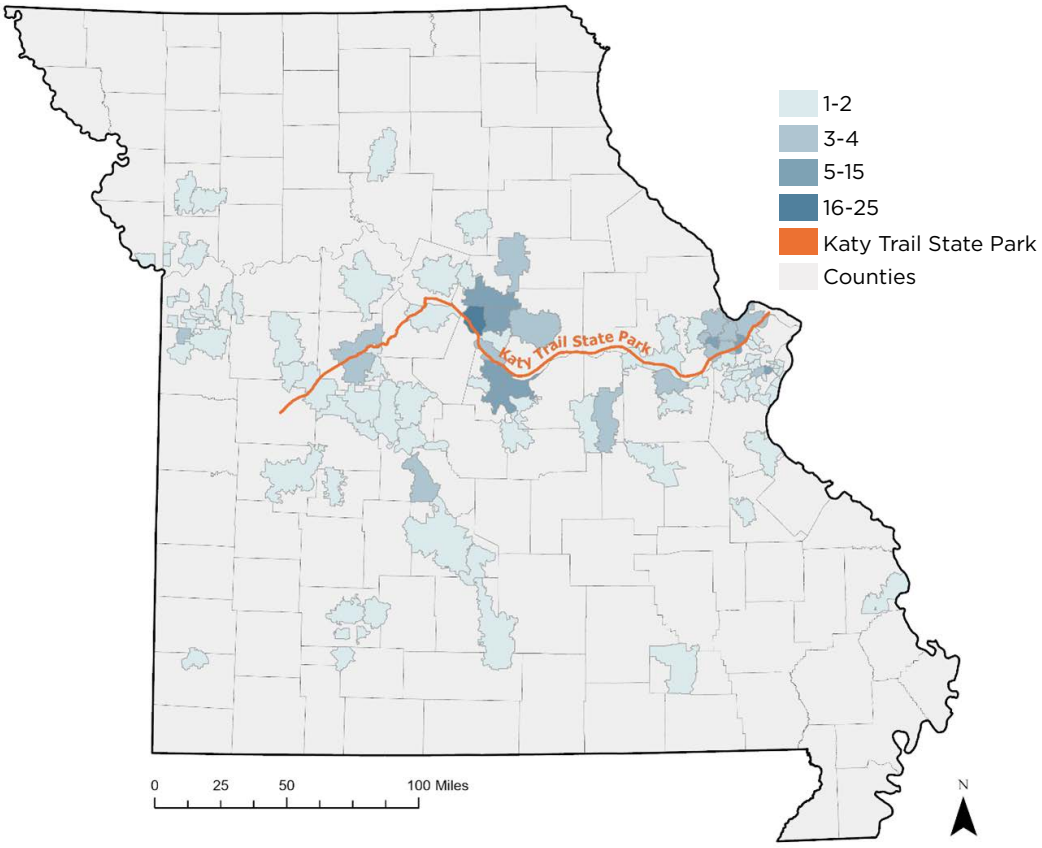


Table 4: Missouri and non-Missouri ZIP codes (N=255)	Number	Percent
Missouri ZIP code	231	90.6%
Non-Missouri ZIP code	24	9.4%

Figure 5: Katy Trail State Park Visitors by ZIP Code



Education. Respondents were highly educated, with the majority holding a graduate or professional degree (39.6%) or a bachelor's degree (36.4%). Smaller shares reported some college or an associate degree (18.2%), a high school diploma (5.0%), or less than a high school education (<1%).

Figure 6: Highest level of education (N=258)

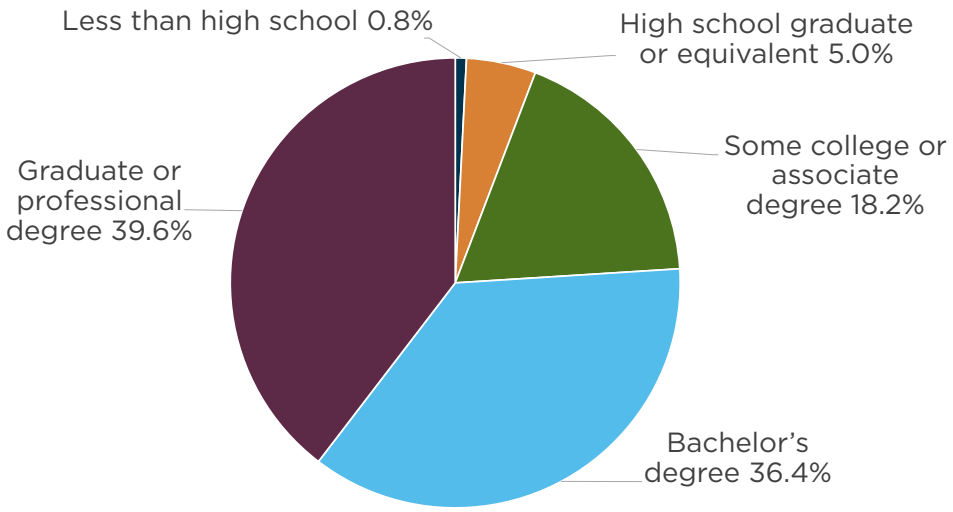


Table 5: Highest level of education (N=258)	Number	Percent
Less than high school	2	0.8%
High school graduate or equivalent	13	5.0%
Some college or associate degree	47	18.2%
Bachelor's degree	94	36.4%
Graduate or professional degree	102	39.6%

Age. More than half of respondents (54%) were age 60 or older, with the largest segment in the 60–69 age group (29.6%). Visitors under age 40 represented a relatively small share of respondents (11.6%).

Table 6: Age (N=250)	Number	Percent
Under 20 years old	1	0.4%
20-29 years old	10	4.0%
30-39 years old	18	7.2%
40-49 years old	40	16.0%
50-59 years old	46	18.4%
60-69 years old	74	29.6%
70-79 years old	56	22.4%
80+ years old	5	2.0%

Gender. A greater proportion of respondents identified as female (59.2%) than male (38.5%), with a small number selecting other or preferring not to answer.

Table 7: Gender (N=260)	Number	Percent
Female	154	59.2%
Male	100	38.5%
Prefer not to answer	5	1.9%
Prefer to self-describe	1	0.4%

Household size. On average, respondents' households included approximately 2.1 adults and 0.6 children.

Table 8: Household size (N=128)	Min.	Max.	Mean
Adults (18 and older)	1	7	2.1
Children (under 18)	0	5	0.6

Race/ethnicity. The majority of respondents identified as White (96.9%). All other racial and ethnic groups each represented less than 3% of respondents.

Table 9: Race/ethnicity (N=269)	Number	Percent
White	251	96.9%
American Indian or Alaska Native	6	2.3%
Asian	4	1.5%
Black or African American	2	0.8%
Native Hawaiian or Pacific Islander	2	0.8%
Hispanic or Latino	1	0.4%
Middle Eastern or North African	1	0.4%
Other	2	0.8%

Percentages do not add up to 100% because survey respondents could select more than one option, and counts exceed the total N.

Income. Household income was broadly distributed, with the largest shares falling between $50,000 and $149,999. Approximately 15% of respondents preferred not to report income.

Table 10: Income (N=256)	Number	Percent
Less than $25,000	7	2.7%
$25,000 – $49,999	18	7.0%
$50,000 – $74,999	52	20.3%
$75,000 – $99,999	48	18.8%
$100,000 – $149,999	45	17.6%
$150,000 – $199,999	22	8.6%
$200,000 or more	25	9.8%
Prefer not to answer	39	15.2%

Visit Information

Seasonal visitation. Respondents reported visiting the Katy Trail most frequently during the summer (9.5 days on average) and fall (8.2 days), followed by spring (7.7 days) and winter (4.3 days).

Figure 7: Average number of days spent on Katy Trail during each season (N=303)

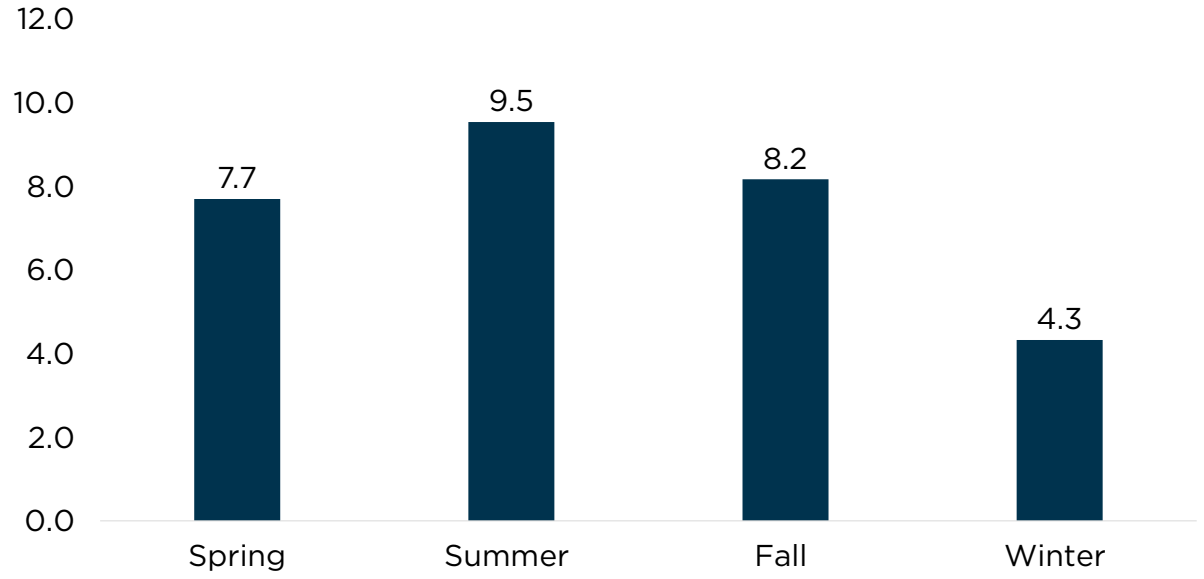


Table 11: Average number of days spent on Katy Trail during each season (N=303)	Minimum	Maximum	Mean
Spring (March-May)	0	75	7.7
Summer (June-August)	0	100	9.5
Fall (September-November)	0	65	8.2
Winter (December-February)	0	60	4.3
Annual total	0	245	24.9

Trip purpose. The majority of respondents (89.2%) reported that visiting the Katy Trail was the primary purpose of their trip, while 10.8% indicated it was a secondary or side trip.

Figure 8: Reason for visit to Katy Trail (N=315)

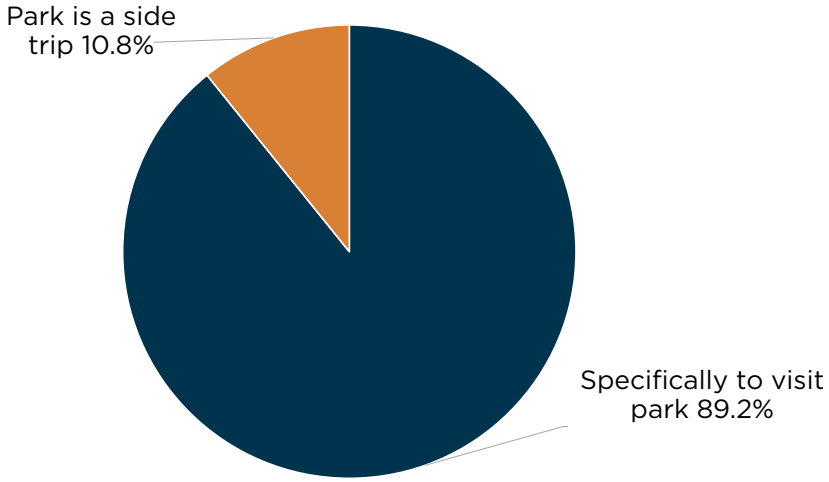


Table 12: Reason for visit to Katy Trail (N=315)	Number	Percent
Specifically visit park	281	89.2%
Park is a side trip	34	10.8%

Group size. The average reported group size was 5.9 people. However, there were several large parties of adults and children, which likely inflated this mean. These values were retained in the analysis because, while large, they were not considered extreme outliers.

Table 13: Group size (N=308)	Minimum	Maximum	Mean
Total (adults and children)	1	320	5.9
Adults (18 and older)	1	320	5.5
Children (under age 18)	0	41	1.0

Spending party size. Respondents reported relatively small spending parties, averaging 1.6 people, indicating that expenses were typically shared among one or two individuals.

Table 14: Spending party size (N=309)	Minimum	Maximum	Mean
Total (adults and children)	1	10	1.6

Overnight vs. day visits. Most visits (74%) were day trips, averaging 3.7 hours. Overnight trips accounted for 26% of visits and averaged 3.9 days in length.

Figure 9: Day trip vs. overnight trip (N=304)

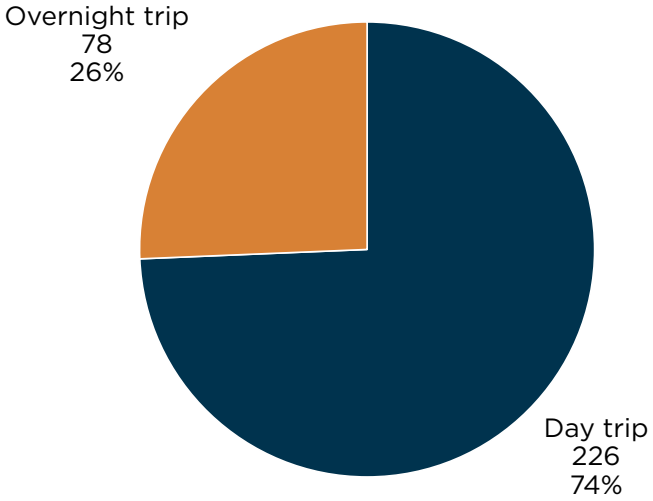


Table 15: Number and length of overnight and day trip (N=304)	Minimum length	Maximum length	Mean length
Day trip	0.5 hour	12 hours	3.7 hours
Overnight trip	1 day	14 days	3.9 days

Travel distance. Most respondents (60.8%) traveled less than 30 miles to visit the trail. Approximately 23.0% traveled more than 60 miles.

Figure 10: Distance traveled to this state park/ historic site (N=314)

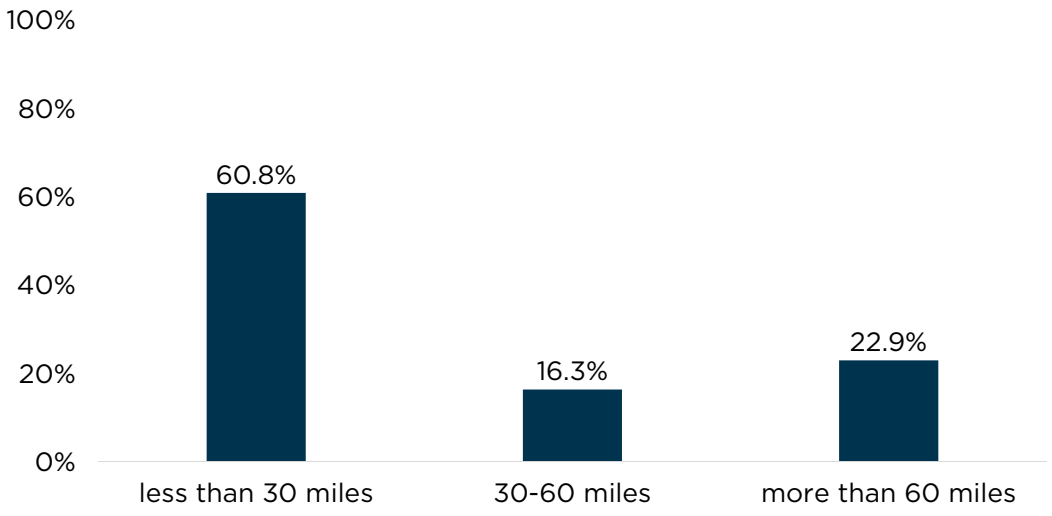


Table 16: Distance traveled to Katy Trail (N=314)	Number	Percent
Less than 30 miles	191	60.8%
30-60 miles	51	16.3%
More than 60 miles	72	22.9%

Activities. Bicycling, walking/hiking/running, and wildlife viewing or nature photography were the most commonly reported activities during respondents' most recent Katy Trail visit, as well as across visits to other Missouri State Parks. Compared to their broader park use, respondents engaged in a narrower range of activities on the Katy Trail, reflecting the design and permitted uses. At other state parks, participation in activities such as camping and water-based recreation (e.g., paddling, swimming, fishing, and boating) was substantially higher. Additional activities reported by a small number of respondents included geocaching, birding, and mushroom gathering.

Figure 11: Activities on most recent visit to Katy Trail vs. all visits to all MO state parks/historic sites in any season

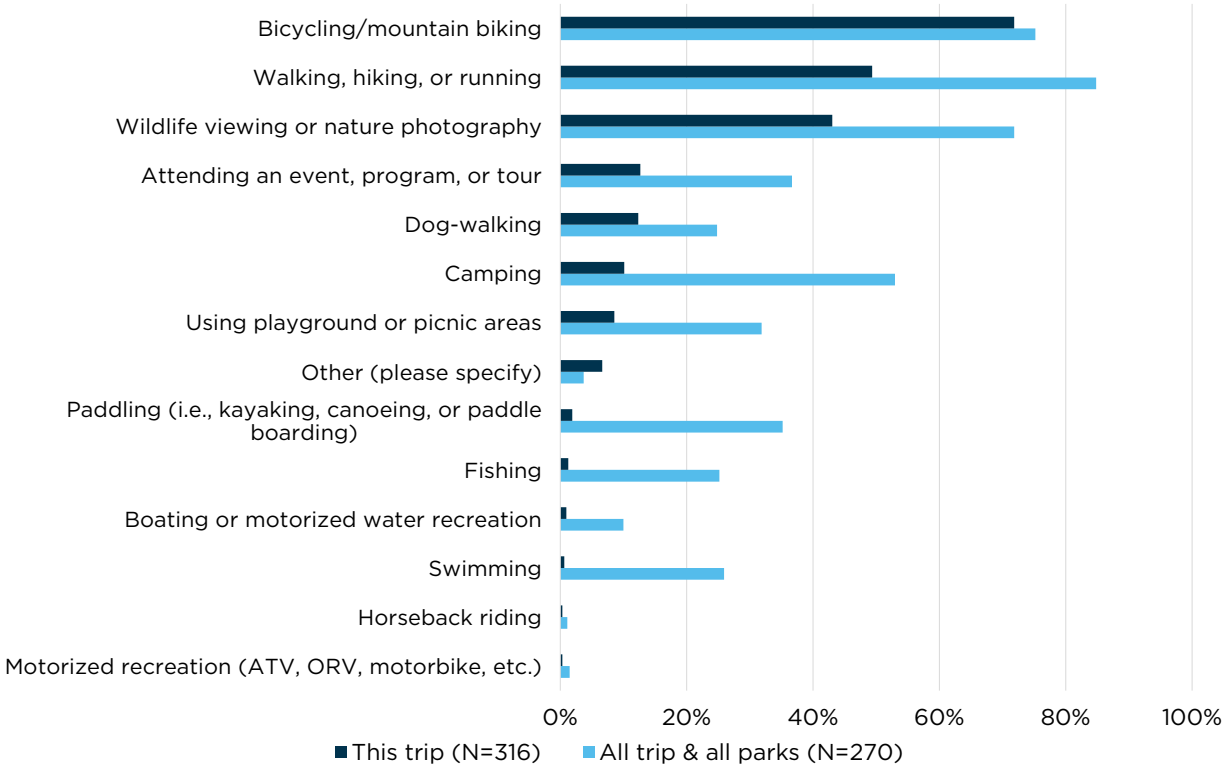
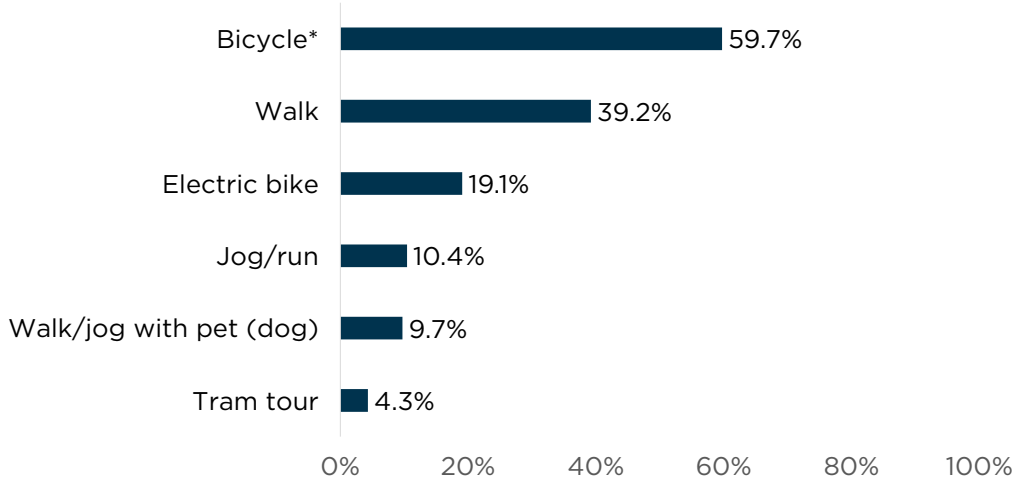


Table 17: Katy Trail use (N=316)	Most recent Katy Trail visit		All visits to any MO State Park	
	Number	Percent	Number	Percent
Bicycling/mountain biking	227	71.8%	203	75.2%
Walking, hiking, or running	156	49.4%	229	84.8%
Wildlife viewing or nature photography	136	43.0%	194	71.9%
Attending an event, program, or tour	40	12.7%	99	36.7%
Dog-walking	39	12.3%	67	24.8%
Camping	32	10.1%	143	53.0%
Using playground or picnic areas	27	8.5%	86	31.9%
Other	21	6.6%	10	3.7%
Paddling (i.e., kayaking, canoeing, or paddle boarding)	6	1.9%	95	35.2%
Fishing	4	1.3%	68	25.2%
Boating or motorized water recreation	3	0.9%	27	10.0%
Swimming	2	0.6%	70	25.9%
Motorized recreation (ATV, ORV, motorbike, etc.)	1	0.3%	4	1.5%
Horseback riding	1	0.3%	3	1.1%

Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Mode of travel on Katy Trail. The most common mode of travel on the Katy Trail was a conventional bicycle (59.7%), followed by walking (39.2%) and electric bicycles (19.1%). Smaller shares reported jogging/running, traveling with pets, or using other modes such as tram tours or mobility devices.

Figure 12: Mode of travel used on most recent visit to Katy Trail (N=278)



Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.
**Conventional upright or recumbent*

Table 18: Mode of travel (N=278)	Number	Percent
Bicycle (conventional upright or recumbent)	166	59.7%
Walk	109	39.2%
Electric bike	53	19.1%
Jog/run	29	10.4%
Walk/jog with pet (dog)	27	9.7%
Tram tour	12	4.3%
Other	3	1.1%
Wheelchair or other personal assisted mobility device	2	0.7%
Horseback	1	0.4%

Distance traveled on Katy Trail. Most respondents (82.0%) reported traveling "out and back," returning to their starting point, while 18.0% traveled one way between different locations. One-way trips covered substantially longer distances (148 miles on average) compared to out-and-back trips (27 miles on average), reflecting the use of the trail for long-distance touring.

Table 19: Distance traveled on Katy Trail (N=273)	N	Percent	Minimum*	Maximum	Mean
Out and back (returned to starting point)	224	82.0%	1	500	27.3
One way (started at one point and ended at a different point)	49	18.0%	3	300	148.3

**Minimum number of miles for respondents who answered this question.*

Activities in surrounding communities. Katy Trail visitors frequently engaged in activities in nearby communities. Among non-local visitors, 78.4% reported dining at restaurants during their visit. Other common activities included visiting wineries or breweries (38.7%), visiting historical attractions (35.6%), and shopping or antiquing (30.9%). These findings highlight the strong connection between trail use and local economic activity. Some respondents also noted overnight stays in local accommodations, including hotels, short-term rentals, and campgrounds.

Figure 13: Additional activities in surrounding areas during most recent visit to Katy Trail among non-local visitors (N=194)

**Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list. Figure does not include those who stated they live in the area.*

Table 20: Activities in surrounding areas during most recent visit to Katy Trail (N=311)	Including people who live in the area		Not including people who live in the area	
	Number	Percent	Number	Percent
Dining at restaurants	207	66.6%	152	78.4%
Visiting a local winery/brewery	105	33.8%	75	38.7%
Visiting a historical attraction	96	30.9%	69	35.6%
Shopping or antiquing	76	24.4%	60	30.9%
Attending a special event or festival	65	20.9%	43	22.2%
Visiting friends or relatives in the area	50	16.1%	35	18.0%
I did not visit the surrounding area	17	5.5%	17	8.8%
Other (please specify)	10	3.2%	9	4.6%
Business or work activities	13	4.2%	7	3.6%
I live in the area	117	37.6%	0	0.0%

Total does not equal "N" and percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

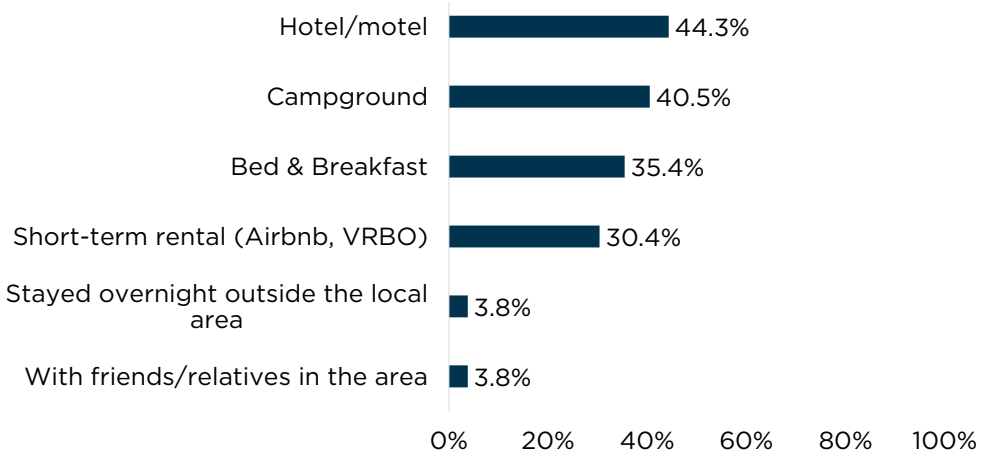
Katy Trail visits expenditures. Average spending per party was highest for lodging ($165), followed by restaurants and bars ($99). Additional expenditures included groceries, transportation, shopping, and recreation-related expenses. A few respondents provided specific expenses for "other" such as a bike storage unit.

Table 21: Katy Trail visit expenses (N=253)	Minimum*	Maximum	Mean
Lodging (hotel, B&B, camping)	$ 35	$ 5,000	$ 165
Restaurants and bars	$ 6	$ 2,000	$ 99
Groceries, beverages, and snacks	$ 1	$ 500	$ 37
Entertainment and recreation (tickets, equipment rentals, fees)	$ 2	$1,000	$ 30
Gas or transportation services (ride share, shuttle)	$ 5	$ 1,500	$ 41
Shopping (sporting goods, clothes, souvenirs)	$ 10	$ 2,000	$ 36
Other (specify)	$ 20	$ 285	$ 7

Mean values include all respondents, including those who reported no spending (i.e., $0) in the category.
**Minimum expense reflects only respondents who reported spending in that category.*

Lodging. Among overnight visitors (n = 79), hotels/ motels (44.3%) and campgrounds (40.5%) were the most commonly used lodging types, followed by bed and breakfasts (35.4%) and short-term rentals (30.4%). Lodging represented the largest single expense category for these visitors.

Figure 14: Type of lodging used during most recent visit to Katy Trail (N=79)



Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Table 22: Type of lodging used during most recent visit to Katy Trail (N=79)	Number	Percent
Hotel/motel	35	44.3%
Campground	32	40.5%
Bed & Breakfast	28	35.4%
Short-term rental (Airbnb, VRBO)	24	30.4%
With friends/relatives in the area	3	3.8%
Stayed overnight outside the local area	3	3.8%
Other (please specify)	1	1.3%

Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Year-round recreation-related spending. In addition to trip-specific expenses, respondents reported spending a household average of $920 annually on equipment and supplies intended for use at state parks and historic sites (e.g., bicycles, camping gear, and outdoor apparel), indicating broader economic contributions beyond individual visits.

Table 23: Year-round household purchases for state park/historic site use (N=242)	Minimum*	Maximum	Mean
How much did your household spend in the past 12 months on other purchases intended for use on or during visits to state parks or historic sites (e.g., bicycle, canoe, camping gear, hiking shoes)?	$5	$17,000	$920

Mean values include all respondents, including those who reported no spending (i.e., $0).
**Minimum value reflects only respondents who reported spending in this category.*

Perceived Benefits

Katy Trail survey respondents overwhelmingly indicated that Missouri State Parks and historic sites provide substantial benefits to the state. Across all attributes, between 78% and 97% of respondents reported that these resources provide either a moderate benefit or a great deal of benefit.

Based on mean scores (on a 1–4 scale, where 1 = no benefit at all and 4 = a great deal of benefit), the highest-rated benefits were offering recreation opportunities (mean = 3.81), supporting mental health and stress reduction (3.81), and supporting physical health (3.81). Closely related benefits, such as improving overall health and well-being (3.78) and conserving natural resources (3.73), were also rated highly.

The lowest-rated benefits, enhancing real estate value (mean = 3.15), generating tax revenue (3.22), and attracting homebuyers and businesses (3.31), were still viewed positively overall, though they were perceived as less impactful compared to recreation, health, and environmental benefits.

Overall, these findings indicate that visitors perceive Missouri State Parks and the Katy Trail as delivering a wide range of important benefits, particularly in the areas of recreation, health, and environmental conservation.

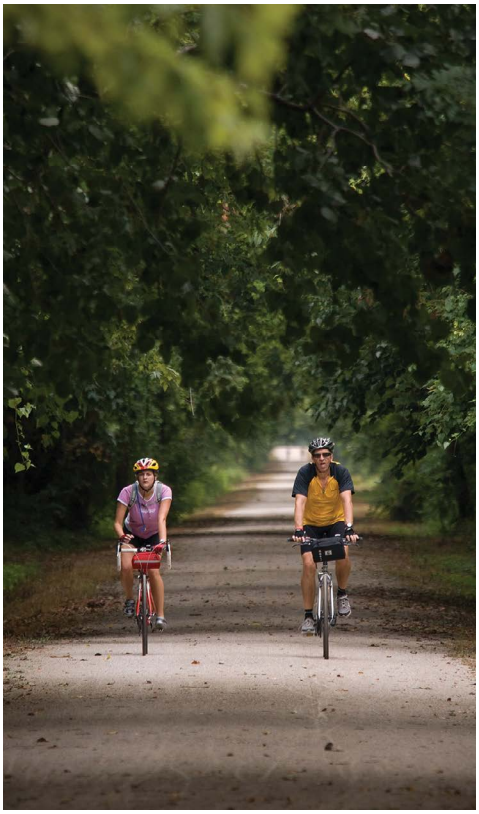


Figure 15: Percentage of Katy Trail users who said that this attribute has "a great deal of benefit" to the state (N=255-259)

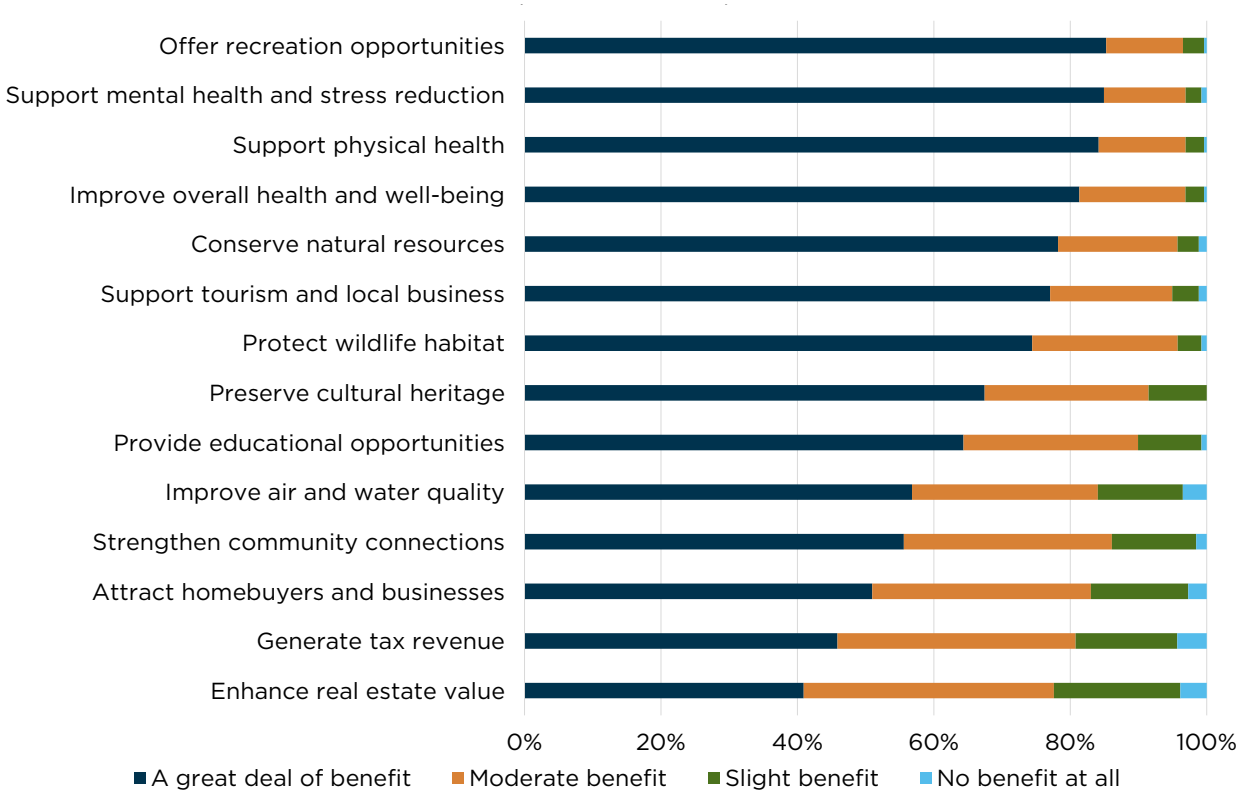


Table 24: Perception of benefits of Missouri state parks/historic sites (N=varies)	No benefit at all		Slight benefit		Moderate benefit		A great deal of benefit		Mean*
	Number	%	Number	%	Number	%	Number	%	
Offer recreation opportunities	1	0.4%	8	3.1%	29	11.2%	220	85.3%	3.81
Support mental health and stress reduction	2	0.8%	6	2.3%	31	12.0%	220	84.9%	3.81
Support physical health	1	0.4%	7	2.7%	33	12.7%	218	84.2%	3.81
Improve overall health and well-being	1	0.4%	7	2.7%	40	15.6%	209	81.3%	3.78
Conserve natural resources	3	1.2%	8	3.1%	45	17.5%	201	78.2%	3.73
Support tourism and local business	3	1.2%	10	3.9%	46	17.9%	198	77.0%	3.71
Protect wildlife habitat	2	0.8%	9	3.5%	55	21.3%	192	74.4%	3.69
Preserve cultural heritage	0	0.0%	22	8.5%	62	24.0%	174	67.4%	3.59
Provide educational opportunities	2	0.8%	24	9.3%	66	25.6%	166	64.3%	3.53
Strengthen community connections	4	1.5%	32	12.4%	79	30.5%	144	55.6%	3.40
Improve air and water quality	9	3.5%	32	12.5%	70	27.2%	146	56.8%	3.37
Attract homebuyers and businesses	7	2.7%	37	14.3%	83	32.0%	132	51.0%	3.31
Generate tax revenue	11	4.3%	38	14.9%	89	34.9%	117	45.9%	3.22
Enhance real estate value	10	3.9%	48	18.5%	95	36.7%	106	40.9%	3.15

Note: N varies by item due to differences in the number of respondents answering each.
** Mean on a scale of 1-4, where 1 = no benefit at all and 4 = a great deal of benefit*

Open-Ended Questions

In a final open-ended question, visitors were invited to provide additional comments or suggestions about their experiences. These responses were analyzed using two approaches: (1) a word cloud to highlight frequently used terms, and (2) a thematic analysis to identify key patterns and recurring topics in the responses.

Word cloud. The word cloud analysis revealed that "Rock Island Trail" was the most frequently mentioned phrase, followed by commonly used terms such as "trail" and "love," reflecting both a strong interest in future trail expansion and overall positive sentiment.

Figure 16: Word cloud of open-ended comments

Thematic analysis. For the thematic analysis, Katy Trail survey comments were analyzed anonymously using Microsoft Copilot. The University of Missouri's Copilot environment provides data protection approved for academic research, and prompts and responses are not stored or used to train AI models. The analysis identified major themes across two broad areas: (1) perceived public benefits of state parks and (2) visitor experiences and suggestions related to park use. These qualitative findings also reinforced the strong positive responses regarding the benefits of state parks reported in the earlier survey section.

Themes related to public benefits:

1. Physical health and wellness benefits. Respondents frequently described the Katy Trail as an important resource for maintaining physical activity through biking, hiking, walking, and long-distance recreation.

> *It enriches so many aspects of our lives and provides an enjoyable way to stay active and engaged as we age.*
>
> *Love the opportunity to hike, bike and paddle with my family... provides so many physical and mental benefits.*

2. Economic and tourism benefits to small communities. Many respondents described the Katy Trail as an important economic and tourism asset for small communities, particularly through visitor spending at local restaurants, shops, hotels, and other businesses. A smaller number questioned whether these economic benefits were equally visible across all trail communities.

> *We feel that the Katy trail brings many people from out of state who spend money at local hotels, restaurants, and shops along the trail.*

I wonder sometimes if the State really realizes the benefits that the trail provides to small businesses in these little towns.

I don't see how the trail helps the economics. Towns along it look worse than they did 10 years ago.

3. Mental health, stress reduction, and peacefulness. Comments frequently emphasized the trail's role in promoting mental well-being, including providing a sense of peace, quiet, and relief from stress.

Please never never ever let them get rid of the Katy (Trail) … it's quite literally saved my life and helped in my mental health journey!"

Love the peace on the Katy Trail. Do not like the increased motor use on the trail.

4. Community value and social connection. Respondents noted the importance of shared experiences on the trail, including time spent with family and friends, as well as opportunities to connect with others and participate in community programs.

Love Tuesdays on Trail program. Wonderful opportunity to see areas I could not get to otherwise.

We are regular riders on the Katy trail, and we often talk to other riders along the way.

5. Environmental and conservation benefits. Many comments reflected appreciation for the preservation of natural spaces, wildlife habitat, and environmental quality.

Green space is essential for our health, even for those who do not enter the green space, because it improves our air, water and wildlife.

These parks are crucial to our State… one of the only ways to preserve wilderness with near certainty.

6. Educational and cultural benefits. Some respondents highlighted the value of interpretive features, historical preservation, and educational opportunities along the trail.

We enjoyed all of the historic markers and information along the trail.

More information on pre-colonial history, geological and native peoples would be appreciated.

7. Affordable and accessible recreation. Respondents emphasized that the trail and state parks are free, usable for all ages, and one of Missouri's most valued public goods.

Missouri State Parks are priceless… there is no admission fee!

They were places we could afford on our budget that proved to be invaluable.

Themes related to visitor experience and suggestions:

1. Support for completing and expanding the Rock Island Trail. Respondents consistently expressed strong support for completing and expanding the Rock Island Trail, often emphasizing regional connectivity, tourism potential, and the urgency to experience the trail within their lifetime.

Develop the Rock Island Trail SP and connect it to the Katy Trail.

Please build the Rock Island Trail.

Needs more money to build more trails…The Rock Island trail needs to be finished before I die!

Please continue investing in the Katy Trail, Rock Island Trail, and other rails-to-trails to enhance connectivity, events, and through-riding.

2. Trail and facility maintenance issues. Many respondents identified concerns related to trail and facility maintenance. Common issues included restroom cleanliness and supplies, trail surface conditions, mowing frequency, bridge maintenance, signage and safety warnings at road crossings, and the need for greater invasive species management and native habitat maintenance.

Restrooms along the Katy Trail and various state parks need to be improved in cleanliness, etc.

Every single trail crossing onto a vehicle path should be marked to the approaching vehicles to use caution.

I do wish more was done about the invasive Japanese Honeysuckle. It's everywhere and it always looks like it's choking out the native plants.

3. Strong emotional attachment and pride. A large number of respondents expressed strong appreciation for the Katy Trail and the Missouri State Parks system overall. Many described the trail as a valuable asset and a point of pride for the state.

The Katy Trail is a treasure!

The Katy Trail is a precious gem within the state of Missouri.

We absolutely love the Katy Trail.

4. Concerns about e-bikes, speed, noise, and trail etiquette. Some respondents raised safety and experience-related concerns associated with increased use of electric bicycles, higher travel speeds, and noise. These comments often reflected a desire to preserve the trail's quiet, nature-focused atmosphere.

I am seeing a lot of motorized/electric usage. And it's becoming more of a problem with high speeds, lack of courtesy and we seem to be losing the quiet, soothing aspects of the rural areas of the trail.

Get fast e bikes off the trail, they are dangerous.

5. Water access issues (especially eastern trailheads). Access to potable water was a recurring concern, particularly along the eastern portion of the trail between Marthasville and St. Charles. Respondents indicated a need for more frequent and reliable water access points.

Water availability between Marthasville and St. Charles could be improved.

More water at eastern trailheads.

I wish there were easier access to water.

6. Requests for overnight accommodations and visitor amenities. Respondents identified a need for additional overnight accommodations and amenities along the trail. Common requests included more camping options, RV hookups, clearer overnight parking guidance, and expanded lodging and support services near trail hubs.

Would love there to be some state campgrounds for RVs and tents along the Katy.

Could use a few more areas where tourists could stay overnight.

IV. Day and Overnight Profiles

To better understand visitor behavior along the Katy Trail, respondents were segmented into two groups based on whether their reported trip was a day visit or an overnight visit. Differences between these groups were examined across all survey questions using descriptive statistics, independent samples t-tests for continuous variables (e.g., seasonal visitation days, activity participation, and group size), and chi-square tests for categorical variables (e.g., trip purpose, travel distance, and demographic characteristics). Comparisons were not conducted for questions that allowed respondents to select multiple responses. All analyses were conducted using IBM SPSS Statistics.

This analysis includes 304 valid survey responses from Katy Trail visitors, consisting of 226 day visitors (74%) and 78 overnight visitors (26%).

It is important to note that the classification of day and overnight visitors differs between the visitor profile and economic impact sections of this report. In this section, classification is based on respondents' self-reported identification of their trip as a day or overnight visit, typically in relation to their Katy Trail experience. In contrast, the economic impact analysis classifies visitors as overnight if they reported lodging expenditures, capturing those who may have used the trail for a day visit but stayed overnight in the surrounding area and contributed to the local economy.

Missouri vs. out-of-state visitors. The visitor origin differed significantly between day and overnight visitors. Day visitors were predominantly Missouri residents (97.3%), with only a small share traveling from out of state (2.7%). In contrast, overnight visitors included a much higher proportion of out-of-state travelers (26.5%), with 73.5% residing in Missouri.

Table 25. Missouri and non-Missouri ZIP codes	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Missouri ZIP code	179	97.3%	50	73.5%	x^2=33.78***
Non-Missouri ZIP code	5	2.7%	18	26.5%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. *p < .05, ** p < .01, *** p < .001.*

These differences are also reflected in the geographic distribution of ZIP codes within Missouri. Day visitors represented 77 unique Missouri ZIP codes, indicating a broad base of primarily local and regional users. Overnight visitors represented 42 Missouri ZIP codes, reflecting a smaller but more geographically dispersed group with a higher share of longer-distance travelers. The accompanying maps illustrate these patterns, with day visitors more concentrated near the Katy Trail corridor and overnight visitors distributed more widely.

Figure 17: Katy Trail State Park Day Visitors by ZIP Code

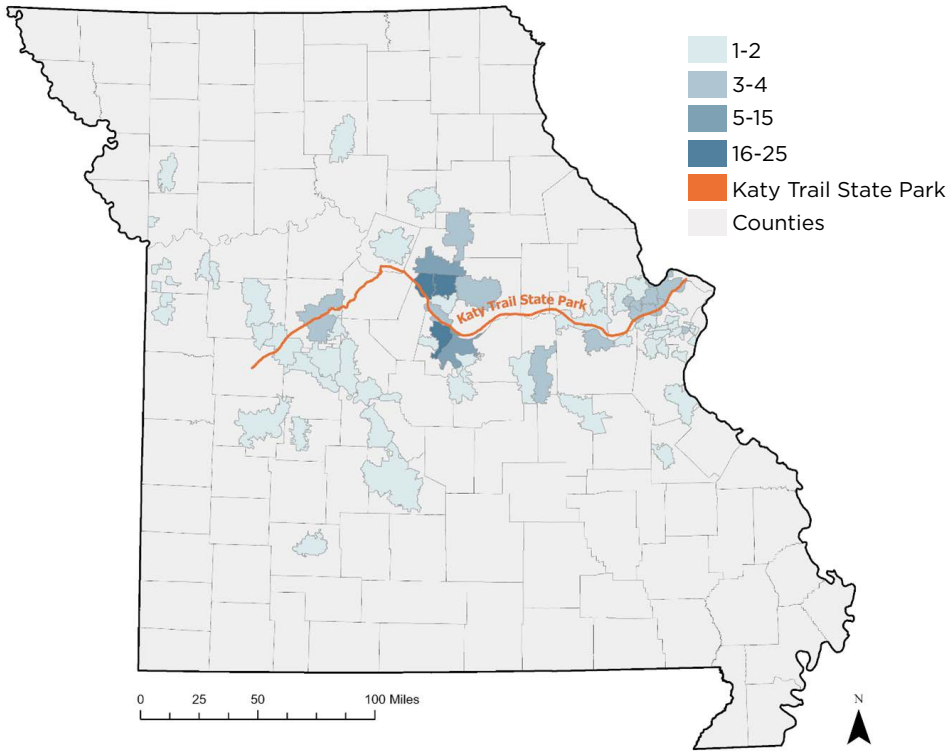
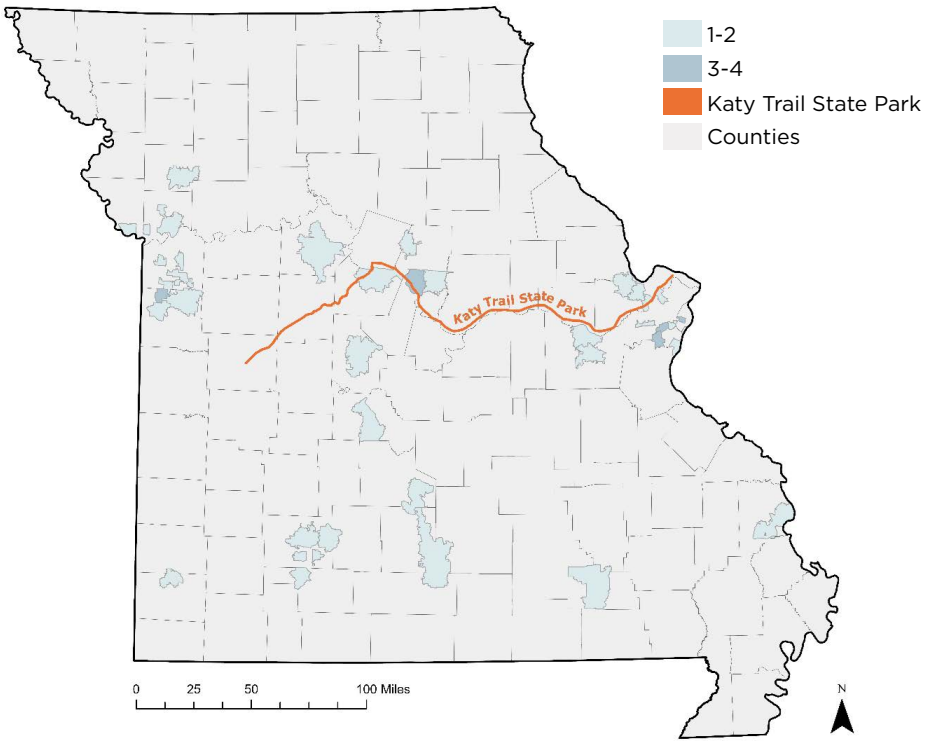


Figure 18: Katy Trail State Park Overnight Visitors by ZIP Code



Age and household size. On average, day visitors were younger (mean age = 54.8 years) than overnight visitors (mean = 59.4 years). Household composition was similar across groups, with both reporting an average of 2.1 adults and fewer than one child per household.

Table 26. Age and household size	Day Visitors		Overnight Visitors		Test Statistic
	Mean	Standard Deviation	Mean	Standard Deviation	t-value
Age	54.8	14.7	59.4	13.0	-6.49***
Household size-adults	2.1	1.5	2.1	0.7	0.31
Household size-children	0.6	1.1	0.4	0.9	2.53

Note: Independent samples t-tests were run to compare day and overnight visitors.
** p < .05, ** p < .01, *** p < .001.*

Other demographic characteristics. Day and overnight visitors were generally similar across demographic characteristics. Most respondents in both groups identified as White, female, and reported household incomes of at least $75,000. Educational attainment was high across both groups, with a majority holding a bachelor's or graduate degree, though day visitors reported slightly higher levels of education overall.

Table 27. Gender	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Male	71	38.0%	26	37.7%	x^2=2.47
Female	110	58.8%	43	62.3%	
Prefer to self-describe	1	0.5%	0	0.0%	
Prefer not to answer	5	2.7%	0	0.0%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. *p < .05, ** p < .01, *** p < .001.*

Table 28. Highest level of education	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Less than high school	1	0.5%	1	1.4%	
High school graduate or equivalent	9	4.9%	4	5.8%	
Some college or associate degree	31	16.8%	15	21.7%	x^2=29.90***
Bachelor's degree	70	37.8%	23	33.3%	
Graduate or professional degree	74	40.0%	26	37.8%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. *p < .05, ** p < .01, *** p < .001.*

Table 29. Income	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Less than $25,000	5	2.7%	2	3.0%	
$25,000 - $49,999	14	7.6%	4	6.0%	
$50,000 - $74,999	38	20.5%	14	20.9%	
$75,000 - $99,999	35	18.9%	13	19.4%	
$100,000 - $149,999	33	17.8%	11	16.4%	x^2=8.45
$150,000 - $199,999	15	8.1%	5	7.5%	
$200,000 or more	14	7.6%	10	14.9%	
Prefer not to answer	31	16.8%	8	11.9%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. *p < .05, ** p < .01, *** p < .001.*

Table 30. Race/ethnicity	Day Visitors		Overnight Visitors	
	Number	Percent	Number	Percent
White	182	97.8%	66	95.7%
American Indian or Alaska Native	5	2.7%	0	0.0%
Middle Eastern or North African	1	0.5%	0	0.0%
Asian	4	2.3%	0	0.0%
Black or African American	0	0.0%	1	1.4%
Hispanic or Latino	0	0.0%	1	1.4%
Native Hawaiian or Pacific Islander	0	0.0%	2	2.9%
Other	2	1.1%	0	0.0%

Note: Race categories can exceed 100% as respondents could select multiple options.

Seasonal visits. No statistically significant differences were observed between day and overnight visitors in seasonal visitation patterns. Both groups reported the highest visitation during summer and fall and the lowest during winter. On average, day visitors reported slightly more total annual visitation days (mean = 26.2) compared to overnight visitors (mean = 21.9), though this difference was not statistically significant.

Table 31. Average number of days spent on Katy Trail during each season	Day Visitors		Overnight Visitors		Test Statistic
	Mean	Standard Deviation	Mean	Standard Deviation	t-value
Spring days visited	7.9	11.5	6.9	12.0	0.53
Summer days visited	9.8	14.4	8.8	15.5	0.44
Fall days visited	7.9	11.2	9.1	12.9	-0.66
Winter days visited	4.2	8.3	4.5	11.2	-0.19
Days visited annually	26.2	40.7	21.9	42.9	0.77

*Note: Independent samples t-tests were run to compare day and overnight visitors. * p < .05, ** p < .01, *** p < .001.*

Trip purpose. There were no statistically significant differences between day and overnight visitors in trip purpose. The majority of both groups reported that visiting the Katy Trail was the primary purpose of their trip (day visitors: 89%; overnight visitors: 95%), rather than a secondary activity within a broader trip.

Table 32. Reason for visit to Katy Trail	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Specifically to visit the trail	198	88.8%	74	94.9%	x^2=2.456
Trail was a side visit	25	11.2%	4	5.1%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. * p < .05, ** p < .01, *** p < .001.*

Travel distance. Day and overnight visitors differed significantly in the distance traveled to reach the trail. Most day visitors (76%) traveled less than 30 miles, while the majority of overnight visitors (67%) traveled more than 60 miles. This pattern indicates that the Katy Trail functions both as a local recreation resource and a destination for longer-distance visitors.

Table 33. Distance traveled to Katy Trail	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
Less than 30 miles	171	75.7%	12	15.4%	x^2=119.42***
30-60 miles	36	15.9%	14	17.9%	
More than 60 miles	19	8.4%	52	66.7%	

*Note: Chi-square tests were run to examine the differences between day and overnight visitors. * p < .05, ** p < .01, *** p < .001.*

Activities. Day and overnight visitors reported similar activity patterns on the Katy Trail. Bicycling was the most common activity for both groups (day visitors: 68%; overnight visitors: 87%), followed by walking, hiking, or running and wildlife viewing. Camping was notably more common among overnight visitors (31%) compared to day visitors (4%).

Table 34. Most common activities on the Katy Trail during most recent visit	Day Visitors		Overnight Visitors	
	Number	Percent	Number	Percent
Bicycling or mountain biking	153	67.7%	68	87.2%
Walking, hiking, or running	120	53.1%	32	41.0%
Wildlife viewing or nature photography	98	43.4%	33	42.3%
Attending an event, program, or tour	27	11.9%	11	14.1%
Camping	8	3.5%	24	30.8%

Note: Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Mode of travel. Bicycling was the most common mode of travel for both groups, reported by 48% of day visitors and 67% of overnight visitors. Walking was the second most common activity (day visitors: 39%; overnight visitors: 26%), followed by electric bike use (day visitors: 16%; overnight visitors: 21%). Other modes, such as jogging/running and traveling with pets, were reported less frequently.

Table 35. Most common modes of travel	Day Visitors		Overnight Visitors	
	Number	Percent	Number	Percent
Bicycle (conventional or recumbent)	109	48.2%	53	67.9%
Walking	87	38.5%	20	25.6%
Electric bike	36	15.9%	16	20.5%
Walk/jog with pet	20	8.8%	6	7.7%
Jog/run	19	8.4%	8	10.3%

Note: Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Miles traveled on the trail and trip type. On average, overnight visitors traveled more miles on the Katy Trail (mean = 70.2) compared to day visitors (mean = 18.5). Day visitors most often completed out-and-back trips (93%), while overnight visitors were more evenly split between one-way trips (47%) and out-and-back trips (53%). These findings reflect the role of overnight visitors in longer-distance trail use.

Table 36. Distance traveled on Katy Trail	Day Visitors		Overnight Visitors		Test Statistic
	Mean	Standard Deviation	Mean	Standard Deviation	t-value
Miles traveled on Katy Trail	18.5	22.5	70.2	103.5	-6.15***

Note: Independent samples t-tests were run to compare day and overnight visitors.
** p < .05, ** p < .01, *** p < .001.*

Table 37. Trip type	Day Visitors		Overnight Visitors		Test Statistic
	Number	Percent	Number	Percent	
One way	13	6.5%	34	47.2%	x^2=61.77***
Out and back	188	93.5%	38	52.8%	

Activities in surrounding communities. Both groups reported similar types of activities in nearby communities, though participation rates were higher among overnight visitors. Dining at restaurants was the most common activity (day visitors: 59%; overnight visitors: 91%), followed by visiting wineries or breweries and historical attractions. Overnight visitors also reported higher participation in shopping and attending events.

Table 38. Most common activities in surrounding area on most recent visit to Katy Trail	Day Visitors		Overnight Visitors	
	Number	Percent	Number	Percent
Dining at restaurants	133	58.8%	71	91.0%
Visiting a local winery/brewery	63	27.9%	41	52.6%
Visiting a historical attraction	52	23.0%	41	52.6%
Shopping or antiquing	44	19.5%	31	39.7%
Attending a special event or festival	44	19.5%	20	25.6%

Note: Percentages do not add up to 100% because survey respondents could select more than one option on the multiple-choice list.

Total activities participated. Total activities were calculated by summing the number of activities each respondent selected for both on-trail and surrounding area activities. Day and overnight visitors participated in a similar number of activities on the trail (day visitors mean = 2.1; overnight visitors mean = 2.4). However, overnight visitors participated in significantly more activities in surrounding communities (mean = 2.8) compared to day visitors (mean = 1.6).

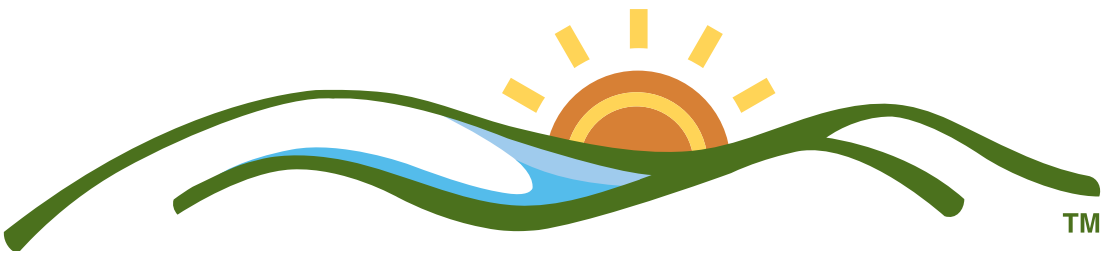
Table 39. Total activities participated	Day Visitors		Overnight Visitors		Test Statistic
	Mean	Standard Deviation	Mean	Standard Deviation	t-value
Total activities on trail	2.1	1.2	2.4	1.4	-1.77
Total surrounding area activities	1.6	1.4	2.8	1.4	-5.96***

Note: Independent samples t-tests were run to compare day and overnight visitors.
** p < .05, ** p < .01, *** p < .001.*

Perceived benefits. Day and overnight visitors reported similarly high perceptions of the benefits provided by Missouri State Parks and the Katy Trail, with no statistically significant differences between groups. The highest-rated benefits included supporting physical health, supporting mental health and stress reduction, and providing recreation opportunities. In contrast, benefits such as enhancing real estate value, generating tax revenue, and attracting homebuyers and businesses received comparatively lower ratings, though they were still viewed positively overall.

Table 40. Perception of benefits of Missouri state parks/historic sites	Day Visitors		Overnight Visitors		Test Statistic
	Mean	Standard Deviation	Mean	Standard Deviation	t-value
Support physical health	3.8	0.5	3.8	0.4	-0.27
Support mental health and stress reduction	3.8	0.5	3.8	0.4	-0.85
Offer recreation opportunities	3.8	0.5	3.8	0.3	-1.12
Improve overall health and well-being	3.7	0.5	3.8	0.4	-0.56
Protect wildlife habitat	3.7	0.6	3.6	0.6	1.38
Conserve natural resources	3.7	0.6	3.7	0.5	-0.82
Support tourism and local businesses	3.7	0.6	3.7	0.5	-1.19
Preserve cultural heritage	3.7	0.6	3.5	0.6	.130
Provide educational opportunities	3.5	0.7	3.5	0.6	0.23
Strengthens community connections	3.4	0.7	3.4	0.7	-0.58
Improve air and water quality	3.3	0.8	3.4	0.7	-1.27
Attract homebuyers and businesses	3.2	0.8	3.3	0.8	-0.92
Generate tax revenue	3.2	0.8	3.3	0.8	-0.90
Enhance real estate value	3.1	0.8	3.1	0.8	-0.35

Note: Measured on a four-point Likert scale (1 = No benefit at all, 4 = A great deal of benefit). Independent samples t-tests were run to compare day and overnight visitors.
** p < .05, ** p < .01, *** p < .001.*



V. Economic Impact Analysis

Introduction

Missouri's state parks and historic sites offer a wide variety of activities, drawing visitors who want to experience the Show-Me State's natural landscapes and rich history. Among them, Katy Trail State Park stands apart for its distinct recreational focus: unlike most parks, it is known primarily as a destination for walking and bicycling. Visitors come not only for day trips along the trail, but also for overnight stays in the Missouri communities that border it. Like all parks, Katy Trail State Park offers value beyond its measurable economic outcomes. Still, its impact on Missouri's economy is an important part of the larger story of how parks contribute to the well-being of the state and its communities.

This section examines the 2025 economic impact of the Katy Trail State Park, or "The Katy Trail," driven primarily by spending from visitors who traveled specifically to visit the park. It also considers the contributions to the state's economy from these travelers' annual household spending on items intended for use in Missouri state parks.

Methodology

A 2025 Missouri state parks survey collected information about respondents' most recent trips to a state park, including their spending patterns. Survey respondents who last traveled to the Katy Trail State Park were used in this analysis to calculate average spending patterns across multiple categories. Combined with Missouri State Park visitation counts, these data provide the foundation for estimating total state spending attributable to the Katy Trail. After estimating visitor expenditures, the data were analyzed in an economic model to measure the ripple effects of this initial spending on other businesses and employees in the state.

It is important to note that the term "economic impact" can refer to a range of spending effects. In this analysis, it represents the contribution of spending associated with the Katy Trail State Park to the state's overall economy. This distinction matters because such spending originates from both Missouri residents and out-of-state visitors. Money flowing from business to business represents a combination of expenditures by Missourians, who travel to the Katy Trail and circulate their spending in the state, and imported dollars from park visitors who live outside the state. Together, these figures illustrate the broader economic role of the Katy Trail State Park within Missouri's economy.

Visitor Spending Analysis

The 2025 survey provided spending data that was analyzed for visitors specifically using the Katy Trail State Park. Expenditures were analyzed by day and overnight visitors, as these travelers typically have different spending patterns. Some values may differ from the survey results reported in the prior section because the impact assessment is based primarily on respondents who provided spending information.

Katy Trail State Park visitor characteristics

Table 41 summarizes average trip group and spending party size, days at the park, and average spending characteristics of Katy Trail visitors. Average per-day spending for Katy Trail day trip visitors was $46 per person, compared to $148 for overnight trip visitors.

Table 41. Katy Trail visitor size and spending characteristics by trip segment	Day Trip	Overnight Trip
Average spending party size	1.4	2.1
Average days at park	1.0	3.1
Average spending by party	$63.23	$979.11
Average spending per person	$46.49	$464.04
Average spending per person per day	**$46.49**	**$148.25**

Breaking out spending by category provides a clearer picture of what Katy Trail visitors purchase during their excursions. Table 42 shows that restaurants account for half of the average daily spending among Katy Trail day-trip visitors. When groceries are included, food and beverage spending accounts for 66% of total expenditures for Katy Trail visitors. Transportation-related spending, such as purchasing gas and retail shopping, were also large spending categories for day-trip travelers.

Overnight Katy Trail visitors tend to spend more across all categories. For these travelers, the highest cost is lodging. Katy Trail overnight visitors spend a daily average of $67 per person on lodging, more than three times the amount that overnight visitors spend at other state parks. This difference likely reflects Katy Trail users' greater reliance on hotels and vacation rentals rather than the campsites more commonly available at other state parks. Their higher restaurant spending compared to other overnight state park visitors is also consistent with this pattern.

Table 42. Katy Trail visitor average spending by category and trip segment	Day Trip	Overnight Trip
Average spending per person per day	**$46.49**	**$148.25**
Lodging (hotel, B&B, camping)	$0.00	$66.51
Restaurants and bars	$24.05	$34.57
Groceries, drinks, and snacks	$6.66	$12.13
Entertainment and recreation (tickets, rentals, fees)	$1.51	$9.36
Gas or transportation services (ride share, shuttle)	$7.25	$13.85
Shopping (sporting goods, clothes)	$6.68	$10.10
Other items and services	$0.34	$1.74

Average Spending Patterns Scaled to 2025 Visitation Levels

The survey provided information on typical day- and overnight-trip spending patterns of Katy Trail State Park visitors, which were applied to 2025 visitation levels from the Missouri State Parks to estimate total expenditures.[6] More than 366,100 people visited the Katy Trail during 2025, and their spending contributed significantly to the state's economy.

Katy Trail State Park visitor spending scaling

The first step in estimating Katy Trail visitor spending was to separate visits into day trips and overnight trips, because spending differs across those two travel segments. Unlike many other Missouri state parks, however, the Katy Trail does not offer in-park camping or lodging. As a result, Missouri State Parks does not have overnight visitor counts for the trail.

Due to these circumstances, overnight trip estimates were derived from survey results. In the 2025 survey, just over one in four respondents (26%) reported taking an overnight trip, a share comparable to that found in a 2012 survey of Katy Trail visitors.[7] The remaining 74% (270,419 travelers) were classified as day visitors, as shown in Table 43.

Following trip segmentation, average spending patterns were applied to Katy Trail visitation figures to estimate total spending. In 2025, visitors to the Katy Trail State Park spent $26.8 million. Of that spending, $24.6 million was from visitors specifically traveling to use the trail, rather than as a side trip. This more conservative figure represents expenditures directly attributable to a Katy Trail visit.

[6] Missouri State Parks. (2025). Missouri State Parks 2025 attendance estimates. https://mostateparks.com/media/pdf/missouri-state-parks-attendance-2025

[7] Missouri State Parks. (2012). Economic impact of Katy Trail State Park. https://mostateparks.com/media/pdf/2012-economic-impact-katy-trail-state-park

Table 43. 2025 Katy Trail visitor spending by category and trip segment	Day Trip	Overnight Trip	Total
Total Katy Trail visitors	270,419	95,723	366,142
% visit specifically for Katy Trail	89%	95%	89%
Visitors specifically for Katy Trail	240,132	90,842	330,973
Spending category	**Day Trip**	**Overnight Trip**	**Total**
Lodging	$0	$6,042,247	$6,042,247
Restaurants and bars	$5,774,547	$3,140,134	$8,914,681
Groceries, drinks, and snacks	$1,599,153	$1,101,666	$2,700,819
Entertainment and recreation	$362,268	$850,077	$1,212,345
Gas or transportation services	$1,741,990	$1,258,458	$3,000,448
Shopping	$1,603,293	$917,053	$2,520,346
Other items or services	$82,804	$157,994	$240,798
Total visitor spending	**$11,164,055**	**$13,467,631**	**$24,631,685**

Notes: Numbers will not sum exactly from the average spending per person per day figures due to rounding.

Spending by category for the Katy Trail was analyzed in the corresponding sectors within the economic model, with values shared out across multiple industries where appropriate.

Household spending by Katy Trail respondents on items intended for park use

Beyond spending during trail visits, Missouri households that visited Katy Trail State Park spent an estimated $4.7 million over a 12-month period on other goods intended for use during state park visits, such as bicycles, canoes, camping gear, and shoes. This estimate reflects in-state travelers, unique visits, and average Missouri household size, as shown in Table 44. Only Missouri residents are included in this spending analysis, as out-of-state visitors are assumed to make household purchases in their home state or country.

Table 44. Household spending on other items intended for state park use	Figures
Total Katy Trail State Park visitors	366,142
% in-state visitors	90.6%
Missouri visitors	331,725
Unique Missouri visitors (based on average park visits)	12,332
Unique Missouri households (based on average household size)	5,138
Average household spending on park items	$920
Total spending on park-use items	**$4,729,320**

Notes: The average Missouri household size is 2.4, according to 2024 U.S. Census data.

Household spending on items intended for state park use spans a broad range of products and retail channels, including online vendors. Missouri household expenditures were therefore modeled using the broad sporting goods commodity category, which includes items such as camping gear, bicycles, canoes, and sports clothing. This approach assumes that households purchase these goods from a combination of in-state and out-of-state retailers, which helps reduce the risk of overstating the economic impact within Missouri.

Impact Modeling

An input-output economic model, IMPLAN, was used to analyze the ripple effects of spending by visitors traveling to Katy Trail State Park. For example, a park visitor purchases gas, food, supplies, and other items during their trip, which benefits businesses and the people they employ. That initial spending, however, also benefits suppliers to those businesses and their employees as additional rounds of expenditures occur. Some of this spending remains in Missouri, while other dollars leak out of the state as imported goods and services are purchased. These ripple effects are important for understanding the broader context of Katy Trail visitors' total contribution to Missouri's economy. More details about the model and terminology can be found in the IMPLAN description section.

Economic Impact of the Katy Trail State Park

Katy Trail State Park is a popular destination for walking and bicycling, attracting visitors interested not only in day trips but also in multi-day excursions across Missouri. Like many parks, it does not offer camping or lodging facilities operated by the Missouri State Parks. However, it generates visitor spending at vacation rentals, hotels, and other privately operated lodging providers.

The Katy Trail also differs from many other state parks in that it passes through some communities and connects several larger metropolitan areas, making it accessible to many Missourians within a short drive, bike ride, or walk. Although Missouri State Parks tracks visitation at several trail access points, those counts likely understate total use because the trail has numerous entry and exit locations. As a result, the economic impact figures presented here should be viewed as conservative estimates of the park's total contribution to Missouri's economy.

Based on 366,142 Katy Trail visitors in 2025, and attributing spending to the 89% of surveyed visitors whose primary purpose was to visit the park, total direct expenditures during trail visits are estimated at $24.6 million. These expenditures generated $19.8 million in Missouri sales, as shown in Table 45. Total sales are lower than direct visitor expenditures because the model accounts for spending leakages, such as from imported goods purchased from outside the state.

Table 45. Economic impact of Katy Trail State Park visitor spending	Employment	Labor Income	GDP	Total Sales
Direct impact	180	$6,696,837	$11,280,050	$19,780,028
Indirect impact	40	$2,776,040	$4,361,726	$8,356,674
Induced impact	41	$2,441,294	$4,569,592	$7,657,792
Total impact	**261**	**$11,914,172**	**$20,211,368**	**$35,794,494**

These direct expenditures related to Katy Trail visits supported 180 jobs in the state and generated $6.7 million in labor income. They also contributed $11.3 million to the state's gross domestic product (GDP).

The impact of this spending extends beyond those direct effects. As visitor dollars move through the economy, they generate indirect effects through supply chains and induced effects as employees spend their earnings on household goods and services. When the additional spending from indirect (supply-chain) and induced (worker spending) effects is included, Katy Trail State Park visitor spending supported 261 jobs, generated $11.9 million in labor income, contributed $20.2 million in GDP, and produced nearly $35.8 million in total sales.

Additional Impacts from Spending on Items Intended for Park Use

Katy Trail survey respondents were more likely than other park respondents to spend higher amounts on items intended for state park use. Katy Trail respondents reported average annual household spending of $920 on park-use items, higher than the $614 average reported by respondents associated with other state parks. Although respondents likely visited parks other than the one tied to their reported spending, the higher expenditures among Katy Trail users are notable and help illustrate their contribution to the state park's overall economic impact.

When this household spending on park-use items is scaled up to all Katy Trail visitors (see Methodology section for details), direct expenditures are estimated at $4.7 million. This spending, primarily on sporting goods, provides additional impacts to Missouri's economy. However, not all of this spending occurs within Missouri or is retained by in-state businesses. After accounting for out-of-state purchases and other leakages, approximately $2.0 million is captured as direct sales to Missouri businesses. This process is explained further in the IMPLAN description section below. These direct sales supported 32 jobs, $835,000 in labor income, and $1.6 million in GDP.

When the ripple effects of indirect and induced spending are included, Katy Trail users' spending on other items intended for state park use supported 38 jobs, generated $1.2 million in labor income, contributed $2.3 million in GDP, and produced nearly $3.3 million in total sales (see Table 46).

Table 46. Economic impact of Katy Trail respondents' spending on other items intended for state park use	Employment	Labor Income	GDP	Total Sales
Direct impact	32	$835,290	$1,652,550	$2,048,112
Indirect impact	2	$136,281	$221,419	$437,531
Induced impact	4	$251,924	$471,525	$790,177
Total impact	**38**	**$1,223,495**	**$2,345,494**	**$3,275,820**

Total Economic Impact of the Katy Trail State Park

The combination of Katy Trail State Park visitors' spending and related household annual expenditures contributed significantly to the state's economy in 2025. As shown in Table 47, the Katy Trail supported nearly 300 jobs, generated $13 million in labor income, contributed $23 million in GDP, and produced $39 million in sales to Missouri businesses.

Table 47. Katy Trail State Park visitor spending and household purchases economic impact	Employment	Labor Income	GDP	Total Sales
Visitor spending	261	$11,914,172	$20,211,368	$35,794,494
Household park-use purchases	38	$1,223,495	$2,345,494	$3,275,820
Total impact	**299**	**$13,137,667**	**$22,556,862**	**$39,070,314**

IMPLAN Description

The estimates for jobs, labor income, gross domestic product, and total sales were derived using IMPLAN, an input-output economic model.[8] This model is widely used by development professionals and researchers to analyze the broader effects of business and spending activities. IMPLAN data are updated annually from three main sources: the U.S. Bureau of Labor Statistics, the Bureau of Economic Analysis, and the Census Bureau.

Spending Relationships in an Economic Model

Economic impact models trace how spending circulates through an economy by mapping the relationships between consumers and businesses. In this case, Katy Trail visitor spending supports industries such as retail, restaurants, and lodging. These businesses, in turn, purchase goods and services from suppliers to meet that demand, generating additional economic activity along the supply chain. Employees in both the directly affected industries and their suppliers then spend their wages on housing, food, and other household needs, further extending the cycle of economic activity.

[8] IMPLAN Group, LLC. (2026). https://implan.com/

By tracking these interconnected flows, the models estimate how an injection of spending ripples through an economy and measure the extent to which income remains within the region or leaks out through imports of goods and services. Leakage is particularly common in sectors such as retail and wholesale trade, where spending supports local businesses' margins that cover labor and profits, but most of the dollars flow out of state to goods producers elsewhere in the United States and abroad. These sectors also face strong competition from online vendors, increasing the likelihood that spending will leak out of the state.

IMPLAN categorizes economic impacts into three types: direct effects (initial visitor expenditures), indirect effects (supply-chain activity), and induced effects (household spending from earned income). Together, these components represent the total economic impact.

Direct effects include revenue, labor income, and jobs supported by visitor spending at stores, restaurants, and other businesses. To make these sales, business owners purchase equipment, supplies, and services, and employ full- and part-time workers.

These initial expenditures lay the foundation for further economic activity, triggering subsequent rounds of spending that create a ripple effect through the economy with indirect and induced impacts:

- **Indirect effects** reflect the economic activity generated through supply-chain purchases. For example, a bike rental service buys tires, helmets, cycling gear, maintenance services, and other inputs from suppliers. Those suppliers, in turn, purchase goods and services from additional firms. At each stage, however, some inputs may be sourced from outside the state due to availability, specialization, or cost. When this occurs, a portion of spending "leaks" out of the state, reducing the amount that continues to circulate within the area.

- **Induced effects** represent the economic activity generated when employees spend their earnings. Workers employed by businesses that directly serve visitors, as well as those working in the supply chain, use their wages to purchase groceries, clothing, housing, healthcare, and other household goods and services.

Total effects combine the direct effects of jobs and income from visitor spending with the ripple effects of indirect supplier and induced household spending to provide a comprehensive accounting of economic activity.

Economic Analysis Terms

- **Total sales** (or Gross Sales) estimates the total value of all sales from visitor spending, including the input costs that represent sales for other firms.

- **Gross domestic product (GDP)** is the value-added part of total sales that deducts the input cost from total sales to show the money left to pay wages, profits, rents, interest, and taxes. GDP represents new wealth to the region.

- **Labor income** captures wages and benefits, which are part of the value-added impact. It represents all spending for labor, including health, retirement and other benefits directed to workers, and income earned by the business owners.

- **Employment** estimates annual average numbers of full- or part-time jobs needed for business operations.

It is important to note that labor income is a component of GDP, and that GDP, in turn, is a component of total sales. Therefore, these figures are not additive; combining them would double-count overlapping effects.

VI. Other Benefits with Economic Implications

The economic contributions of Missouri's state parks are evident in their measurable impacts on employment, income, and gross domestic product, which are key indicators of the jobs and wealth supported through visitor spending. State parks and trails also provide broader benefits that are valuable but more difficult to quantify, including contributions to community growth, real estate value, and public health outcomes.

This section presents additional analysis and research to better understand these economic implications for communities and individuals, while acknowledging that a complete accounting of these effects is beyond the scope of this report.

Community Growth Benefits

Prior research finds that rural counties with economies centered on recreation tend to experience stronger population and employment growth than otherwise comparable communities.[9,10,11] These recreation-dependent areas also show higher rates of self-employment and entrepreneurial activity.[12,13,14] Accelerated population growth, often driven by retirees or remote-capable workers, spurs local demand and creates conditions that support business formation.

Reliance on recreation alone, however, can expose communities to seasonal job fluctuations and upward pressure on the cost of living, particularly in housing. In contrast, a more diversified economic base, where recreation-related jobs are balanced by employment in other industries, can provide greater stability while preserving the growth and amenity benefits associated with recreation.

Missouri's state parks are found across the state, with most located in rural communities (see Figure 19). To examine how proximity to these parks is associated with local population and employment change, trends over the past 20 years are analyzed for ZIP codes adjacent to state parks and compared with trends in non-park-adjacent ZIP codes. This approach enables an assessment of differences in growth between the two groups.

To account for longstanding differences in growth patterns, ZIP codes are further differentiated by metropolitan (metro) and nonmetropolitan (nonmetro) areas. This distinction is important because metro areas in Missouri, and nationwide, have historically grown faster than more rural nonmetropolitan communities.

Table 48 shows the population and job figures for 2005 and 2025, along with the percentage change over the 20 years, and the 2025 cost-of-living index for Missouri and four ZIP code groups. The job estimates are from Lightcast, a labor market analysis tool that includes payroll employment data from the U.S. Bureau of Labor Statistics and self-employment figures from the U.S. Census Bureau.

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[9] Hunter, L. M., Boardman, J. D., & Saint Onge, J. M. (2005). The association between natural amenities, rural population growth, and long-term residents' economic well-being. *Rural Sociology*, 70(4), 452–469. https://doi.org/10.1526/003601105775012714

[10] Reeder, R. J., & Brown, D. M. (2005). Recreation, tourism, and rural well-being (Economic Research Report No. 7). U.S. Department of Agriculture, Economic Research Service. https://www.ers.usda.gov/webdocs/publications/46126/15112_err7_1_.pdf?v=58678

[11] Headwaters Economics. (2019). Recreation counties attracting new residents and higher incomes. https://headwaterseconomics.org/wp-content/uploads/recreation-counties-attract-report.pdf

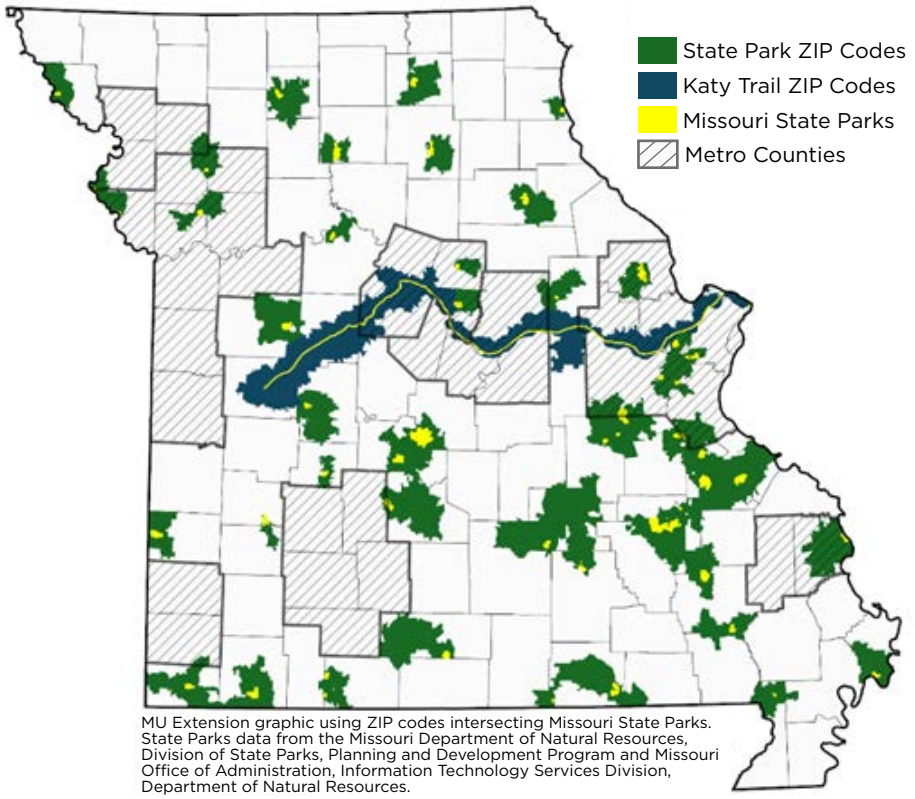
[12] McGranahan, D. A., Wojan, T. R., & Lambert, D. M. (2011). The rural growth trifecta: Outdoor amenities, creative class, and entrepreneurial context. *Journal of Economic Geography*, 11(3), 529–557. https://doi.org/10.1093/jeg/lbq007

[13] White, M. (2025). Nonemployer businesses and the geography of self-employment. farmdoc daily (15):118, Department of Agricultural and Consumer Economics, University of Illinois at Urbana-Champaign. https://farmdocdaily.illinois.edu/2025/06/nonemployer-businesses-and-the-geography-of-self-employment.html

[14] Spell, Alan. (2025). Missouri Economy Indicators: Online Microbusiness Trends. University of Missouri Extension. https://extension.missouri.edu/media/wysiwyg/Extensiondata/Pro/ExCEED/Docs/MissouriEconomy_Microbiz_v6i11_15Sep2025.pdf

The metro area ZIP codes adjacent to state parks ZIP codes show population growth of over 17% from 2005 to 2025, compared to 9% for non-adjacent metro ZIP codes. Similarly, job growth in metro park ZIP codes shows greater gains over the twenty years than in non-park urban ZIP codes.

Figure 19: Missouri State Parks and Adjacent ZIP Codes



MU Extension graphic using ZIP codes intersecting Missouri State Parks. State Parks data from the Missouri Department of Natural Resources, Division of State Parks, Planning and Development Program and Missouri Office of Administration, Information Technology Services Division, Department of Natural Resources.

Table 48: Missouri State Park and non-park ZIP code population and job trends	Missouri	Metro Park ZIPs	Metro Non-Park ZIPs	Nonmetro Park ZIPs	Nonmetro Non-Park ZIPs
Population (2005)	5,818,200	516,300	3,755,100	414,100	1,132,700
Population (2025)	6,275,100	605,300	4,092,300	441,800	1,135,700
Population Change %	**7.9%**	**17.2%**	**9.0%**	**6.7%**	**0.3%**
Jobs (2005)	3,014,300	235,000	2,122,900	186,600	469,800
Jobs (2025)	3,144,800	263,200	2,251,900	185,900	443,800
Jobs Change %	**7.0%**	**12.0%**	**6.1%**	**-0.4%**	**-5.5%**
2025 Cost of Living	90.5	93.3	92.1	89.4	90.3

Source: Lightcast. Jobs include payroll and self-employed figures. Figures rounded to the nearest hundred.

Between 2005 and 2025, nonmetro ZIP codes adjacent to state parks experienced population growth of 6.7%. Although this was below the statewide growth, it far outpaced growth in non-adjacent ZIP codes, which increased by just 0.3% over the same period.

Employment declined in both groups of nonmetro ZIP codes. This pattern is consistent with broader national trends in rural labor markets, as many rural areas have experienced sustained employment losses over the past two decades.[15] However, the nonmetro park-adjacent ZIP codes saw a relatively modest decline of 0.4% in employment over the twenty years, compared to a decline of more than 5% in non-adjacent areas.

[15] Economic Research Service. (2026). Rural employment and unemployment. U.S. Department of Agriculture. Retrieved March 4, 2026, from https://www-tx.ers.usda.gov/topics/rural-economy-population/employment-education/rural-employment-and-unemployment

This analysis does not establish a causal relationship between the presence of Missouri state parks and the stronger population and employment trends observed in adjacent ZIP codes over the past two decades; demonstrating causality would require additional study. However, the findings indicate a positive association between proximity to state parks and relatively more favorable demographic and employment outcomes. This pattern is consistent with prior research linking access to natural amenities and local economic performance.

Missouri remains an affordable place to live and work, with the cost of living at roughly 90% of the U.S. average. One potential challenge in highly attractive, recreationally dependent communities is that living costs can rise as the population grows. However, 2025 Missouri cost-of-living data (see Table 48 on previous page) show only modest differences across ZIP code groups. Metro areas are generally more expensive than nonmetro areas, but all groups remain below the national average.

Missouri benefits from a diverse economy, which helps moderate living costs by giving residents flexibility in where they live and work. In fact, many workers commute across county lines for employment while living in more affordable areas.[16] An employment analysis of Missouri ZIP code groups indicates that park-adjacent and non-park-adjacent areas are relatively diverse, with substantial overlap in industry composition (see Table 49).

Table 49. Missouri State Park and non-park ZIP code sector employment, 2025	Metro Park ZIPs	Metro Non-Park ZIPs	Nonmetro Park ZIPs	Nonmetro Non-Park ZIPs
Agriculture & natural res.	1%	1%	2%	4%
Construction	7%	6%	6%	5%
Manufacturing	8%	9%	12%	11%
Wholesale trade	3%	4%	2%	3%
Retail trade	11%	9%	14%	11%
Transport & warehousing	3%	4%	2%	4%
Finance & insurance	5%	5%	3%	3%
Prof. & tech. services	6%	6%	2%	2%
Admin. & support services	4%	5%	3%	3%
Education services	2%	4%	1%	1%
Health & social services	14%	15%	14%	12%
Arts & recreation	2%	2%	2%	1%
Hospitality & food services	11%	8%	12%	7%
Other sectors	11%	11%	7%	8%
Government	12%	13%	17%	24%
Total	**100%**	**100%**	**100%**	**100%**

Source: Lightcast

Both nonmetro ZIP code groups are more concentrated in agriculture, manufacturing, and government employment than metro areas, a pattern typical of rural communities. In contrast, metro economies tend to have a higher share of employment in finance, insurance, and professional and technical services. Park-adjacent ZIP codes do have more retail, hospitality, and food service employment than non-park-adjacent areas, reflecting the influence of visitor spending on local economic activity.

[16] Krohn, J., & Spell, A. (2026). Missouri Economy Indicators: Commuting across counties (Vol. 7, Issue 2). University of Missouri Extension. https://extension.missouri.edu/media/wysiwyg/Extensiondata/Pro/ExCEED/Docs/MissouriEconomy_Commuting_v7i2_2Feb2026.pdf

Real Estate Benefits

Trail and greenway systems function as important economic assets by enhancing community attractiveness and influencing local real estate markets. As linear recreation infrastructure that connects neighborhoods, towns, and regional destinations, trails generate consistent visitor activity while also improving the quality of life for residents.

This translates into economic value through both direct and indirect channels. Visitor spending on lodging, food, retail, and services supports local businesses,[17] while the presence of trails can increase the desirability of nearby communities as places to live.[18] Over time, these factors can contribute to changes in housing demand and property values in areas with access to trail infrastructure. Research on trails and greenways supports this relationship. Proximity to trails has been associated with higher residential property values, although the magnitude of these effects varies depending on local conditions and trail characteristics.[19,20,21,22,23]

The implications of these real estate effects extend beyond individual property owners. Higher property values can expand the local tax base, supporting public services and infrastructure investment.[24] Increased residential demand can also stimulate new housing development and related economic activity. In addition, trails can support commercial growth, particularly in sectors such as lodging, dining, and retail that benefit from recreation-related visitation.

These benefits may also involve tradeoffs. In some markets, increased demand for housing near high-quality recreational amenities has been associated with rising housing costs, raising concerns about affordability and potential displacement. Research on green infrastructure emphasizes the need for planning and policy approaches that support long-term affordability and equitable access.[25,26]

Health Benefits

The health benefits associated with access to trails and green space are well established, with research showing that exposure to natural environments is linked to a wide range of positive health outcomes.[27] These include reductions in blood pressure, heart rate, stress indicators, and the incidence of chronic diseases, as well as lower mortality rates.[28]

At a population level, areas with greater access to trails and outdoor recreation opportunities tend to have lower obesity rates.[29] These outcomes carry important economic implications, particularly through reduced healthcare expenditures and improved workforce productivity. Physical inactivity

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remains a significant public health challenge.[30] Investment in trail infrastructure, along with connected greenways and park systems, is intended in part to address this issue by expanding opportunities for routine physical activity. Trails support activities such as walking, running, and cycling, which are associated with improved cardiovascular and respiratory health, reduced risk factors for chronic disease, lower mortality rates, and decreased prevalence of conditions such as heart disease and obesity.[31]

These improvements translate into measurable economic benefits. Increased physical activity is associated with lower healthcare costs related to chronic disease and inactivity.[32,33] At a broader scale, investment in trail and active transportation infrastructure generates substantial economic returns. Walking and biking infrastructure contributes more than $34 billion annually to the U.S. economy, with a significant share of these benefits attributable to reduced healthcare spending and improved health outcomes.[34] Some analyses estimate that the economic benefits of such investments exceed their costs by a factor of more than three, indicating that trails function as cost-effective public health interventions.[35]

Beyond physical health, trail use is associated with improved mental health outcomes, including reductions in stress, depression, and anxiety, as well as improvements in mood and attention.[36] These effects have economic relevance, as improved mental health can enhance labor force participation, reduce absenteeism, and increase productivity. Trails also support social interaction and community cohesion, which are linked to improved psychological well-being.[37]

Taken together, trail systems function as a form of public health infrastructure. By providing accessible, low-cost opportunities for healthier lifestyles, they generate broader economic value through reduced healthcare costs, increased productivity, and improved quality of life.

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VII. Recommendations

The following recommendations are informed by the findings of the visitor survey, economic impact analysis, and supporting research. They are intended to guide future investment, management, and partnership strategies for the Katy Trail.

1. Promote and expand overnight and multi-day visitation to increase economic impact. Overnight visitors generate significantly higher per-person and per-day spending, especially in lodging and dining, and tend to travel farther, stay longer, and engage in more activities. Encourage extended stays through targeted marketing, mapped itineraries, trip planning resources that highlight multi-day experiences and promote stops in local communities, and support group events (e.g., Pedaler's Jamboree). Bundled experiences, such as coordinated packages linking trail use with hiking or visiting historical attractions and nearby destinations, can further incentivize longer visits. Additionally, increase lodging capacity and supporting infrastructure (e.g., campgrounds, cabins, hotels, and partnerships with local providers). Enhance services that facilitate long-distance and one-way travel (e.g., shuttle systems, luggage transfer, and coordinated logistics) to better support high-mileage users and multi-day trips.

2. Strengthen local access and day-use experience. Findings show most Katy Trail users travel less than 30 miles and are frequent, repeat visitors who primarily engage in shorter, day-use trips. These users represent a substantial share of total visitation and rely heavily on convenient access points, parking, and well-maintained basic amenities. Feedback also highlights the importance of restrooms, water access, signage, and trailhead quality in shaping the day-use experience. Continue to invest in essential amenities and short-duration experiences that support frequent local use. Maintain and enhance access points, parking, and trailhead infrastructure. Ensuring a high-quality, accessible day-use experience can help sustain visitation levels, support community engagement, and reinforce the trail's role as a valuable recreational asset.

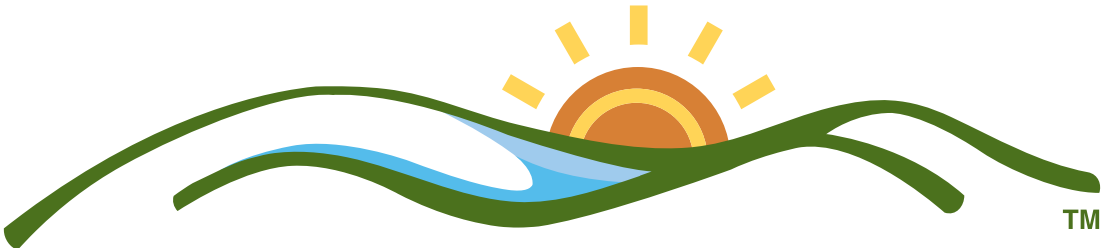
3. Strengthen trail town integration and enhance local business and visitor services. Findings show high participation in dining, wineries/breweries, shopping, and attractions, with restaurant dining as the most common non-trail activity. Substantial visitor spending in food, beverage, and retail categories highlights the trail's strong connection to local economies. To build on this, deepen partnerships with local businesses and communities along the trail. Further, improve the availability, visibility, and connectivity of dining, retail, and other visitor services. Coordinated marketing, trail town branding, and wayfinding to nearby amenities can better integrate the trail with surrounding economies. In addition, regional recreation packages that link the trail with parks, attractions, restaurants, and lodging can create more seamless visitor experiences and further increase local economic impact.

4. Maintain and enhance trail infrastructure to support cycling and system connectivity. Bicycling is the dominant activity on the Katy Trail, with growing use of e-bikes (electric) and a large share of users aged 60 and older. Visitors emphasize the importance of trail surface quality, safety, signage, restrooms, and water access, and express strong support for expanded connectivity, including completion of the Rock Island Trail. The rise in e-bike use introduces additional safety considerations related to speed differentials, trail etiquette, and user interactions. Together, these findings highlight the need for high-quality core infrastructure, improved safety measures, and expanded, connected systems. Continue investing in trail surface quality, accessibility, signage, and safety features. Expand bicycle-related amenities such as repair stations, rentals, and wayfinding. Incorporate safety guidance, education, and potential design considerations to address increasing e-bike use. Prioritize key trail expansions and regional connections to improve continuity between trail segments and communities and support evolving use.

5. Strengthen communication of economic, health, and community benefits. Findings indicate that users strongly recognize the Katy Trail's mental and physical health benefits, with over 80% reporting a "great deal" of benefit and over 95% at least moderate benefit. Economic impacts, although substantial, are somewhat less visible to users. The trail generates significant contributions to local spending, jobs, and GDP, underscoring its role as both a public health and economic asset. More clearly communicate the full range of benefits provided by the trail by emphasizing its economic contributions alongside its well-established health and quality-of-life

impacts. Integrating these messages into outreach, partnerships, and funding justification can strengthen public support and stakeholder engagement.

6. Enhance interpretive and educational experiences in support of natural character and stewardship. Findings show that users place a high value on the trail's scenic beauty, peacefulness, and natural environment, and strongly support conservation and resource protection. Moderate ratings for educational benefits suggest an opportunity to deepen visitor engagement with these valued resources through interpretation and programming. Expand interpretive and educational programming, signage, and partnerships that highlight ecological, historical, and cultural assets in ways that reinforce and elevate the trail's natural character. Integrating education with stewardship efforts can strengthen visitor appreciation and support ongoing conservation and resource protection.

7. Enhance data collection, sampling approaches, and analysis to better capture representative, year-round, and spatial visitation patterns. The current survey data may not fully represent seasonal variation in visitation or capture the full diversity of users, particularly those less likely to respond to QR codes or online distribution methods. Differences in travel distance, day versus overnight use, and regional visitation patterns highlight the value of more detailed spatial analysis. Expand survey implementation across all seasons, stratify sampling to reflect year-round use, and diversify recruitment methods through increased intercept surveys and on-site data collection. Incorporating GIS-based analysis into survey reporting and economic impact modeling can provide deeper insight into visitor origins, spatial use patterns, and proximity-based impacts.

8. Expand research to quantify broader economic and social benefits of trails. Findings indicate that trails are associated with a range of broader economic and social outcomes beyond direct visitor spending, including stronger population and employment trends in nearby areas, enhanced real estate values, and measurable public health benefits. However, these relationships are associative rather than causal, and many impacts, such as healthcare cost savings, property value effects, and long-term community development, are not fully captured in the current economic impact estimates. Future analyses could expand methodological approaches to better quantify these indirect and induced benefits, including longitudinal and causal analysis of trail proximity, improved measurement of housing market and affordability impacts, and integration of health economics to estimate cost savings and productivity gains. Incorporating these broader benefit categories into future analyses would provide a more comprehensive understanding of the full economic value of trails.