

# Katy Trail Economic Impact Report

Visitors and MGM2 Economic Impact Analysis

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## Executive Summary

The Katy Trail State Park is an approximately 240-mile-long, 12-foot-wide (on average) linear park that meanders across the state of Missouri, touching dozens of small and large communities along the way. This 22-year-old scenic rail-to-trail route was built for bicycling, hiking, walking and running, and attracts an estimated 400,000 visitors a year.



Figure 1 - Katy Trail State Park

Hundreds of businesses along the Katy Trail provide a variety of tourism-related services, from wineries, restaurants and shops to bed and breakfast (B&B) inns, motels and campgrounds. The Katy Trail has been a catalyst for tourism development, and many small businesses depend on the trail for an ongoing stream of customers.

Missouri State Parks conducted this study to determine the economic impact of Katy Trail State Park and its visitors on the Missouri economy. Trail user surveys – both on-site intercepts and longer user surveys returned by mail – were used to collect data on the types of users, visitor party size and demographics, the frequency and length of visits, and related spending. Visitor counts were derived from automatic counters located along the length of the trail, which were calibrated through on-site physical counts of Katy Trail users. The data were analyzed using the MGM2 economic impact modeling software.

### Economic Impact

According to analysis using Money Generation Model Version 2 (MGM2) economic impact software,<sup>1</sup> the 400,000 annual visitors to Katy Trail State Park have a total economic impact of \$18,491,000 a year, which supports 367 jobs with a total payroll of \$5,128,000. The total value added to the local community from visitor spending is \$8,204,000.

Visitors to the Katy Trail spent, on average, \$45 per person per day/night of their trip. They also spent, on average, \$56.82 per person per day/night of their trip on Katy Trail-related expenses such as bicycles clothing and other trail-related expenses during the past year.

The average party of 3.21 visitors spent \$182.50 total during their visit and \$147.14 per party day.

Although nearly three-fourths of Katy Trail visitors were day users, one in four spent the night on or near the trail. On average, visitors traveled 83 miles to reach the Katy Trail – from an average of nine miles for local visitors<sup>2</sup> and 32 miles for nonlocal day visitors to 272 miles for bed and breakfast, hotel and motel visitors.

<sup>1</sup>MGM2 employs four visitor segments, and uses aggregate spending averages and multipliers to estimate the economic impact of all visitor spending.

<sup>2</sup> Local visitors are defined as those who live in a ZIP code adjoining the trail and travel less than 30 miles to reach the trailhead.

Day visitors spent an average two hours and 49 minutes in and around the Katy Trail while overnight visitors stayed an average two and a half nights.

Local day user parties (2.07 people per party) spent an average \$18 per trip and \$309 in the past year on bicycles, bicycle supplies, clothing, shoes, and other trail-related expenses. Nonlocal day user parties (2.82 people) spent an average \$56 per trip and \$355 in annual trail-related expenses.

Overnight hotel, motel and B&B visitor parties (3.90 people) spent an average \$700 per trip and \$504 in annual trail-related expenses. Overnight campground visitor parties (7.85 people) spent an average \$231 per trip and \$376 in annual trail-related expenses.

### **Visitors**

For this study, we identified local users as those who live in ZIP codes that adjoin the Katy Trail and traveled 30 miles or less to reach the trailhead. All other visitors are considered nonlocal.

About 33% of Katy Trail visitors surveyed were local and about 67% were nonlocal. About 73% were day visitors and 27% spent the night near the Katy Trail.

About 93% of visitors were from Missouri, 6% from out-of-state.

More than one in five was visiting the Katy Trail for the first-time, and those first-timers spent significantly more than returning visitors.

Nearly 85% of visitors bicycled the Katy Trail, riding an average distance of 45 miles per trip. One in five Katy Trail visitors stopped at a small town along the trail; nonlocal visitors were significantly more likely to visit a nearby town. Thirteen percent overall visited a local winery, 12% visited a historic attraction and 10% went shopping or antiquing during their Katy Trail visit.

The Katy Trail attracts many return visitors. About 90% visit at least once every two to three months and 60% visit two to three times per week during the spring, summer and fall. In the winter, 50% visit the trail at least every two to three months, while one in five visits two to three times per month.

### **Satisfaction**

Two thirds of visitors were very satisfied overall with the trail, and more than half of visitors were very satisfied with trail cleanliness, directional signs, safety, exhibits/interpretive panels and information about local community services. Less than 45% were very satisfied with the maintenance/upkeep of trail facilities, the condition of the trail surface, restroom cleanliness, drinking water availability, restaurant dining options, overnight lodging and restroom availability in the communities.

Only 25% were very satisfied with food/grocery options and only 22% were very satisfied with bicycle repair/maintenance services, two issues that are of high relative importance to visitors. Only one in five was satisfied with campgrounds and shuttle services, but those issues were of lower relative importance to visitors.

## Spending and MGM2 Analysis (Economic Impact)

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Assuming **400,000 annual visitors** to the Katy Trail, the following is the economic impact of visitor spending, as calculated through MGM2 analysis of our user studies (see page 43 for a detailed explanation of economic impact terms).<sup>3</sup>

- The total economic impact of the Katy Trail in 2011 was nearly \$18.5 million.
- The average visitor party (3.21 people) spent \$147.14 per night.
- Visitors spent, on average, \$45 per person per day/night of their trip on trip-related expenses.
- Visitors spent, on average, \$56.82 per person per day/night of their trip on Katy Trail-related expenses.
- The total economic impact of \$18,491,000 included both direct and indirect spending, which supported 367 jobs with a total payroll of \$5,128,000.<sup>3</sup>
- Total value added<sup>3</sup> from direct and indirect spending was \$8,204,000.
- The direct economic effect<sup>3</sup> in 2011 included an estimated \$10,432,000 in direct sales, which supported 317 jobs and \$4,097,000 in salary and wages.
- Value added<sup>3</sup> from direct visitor spending alone was \$6,302,000.
  - **Local day visitors** (31%) spent on average:
    - \$17.54 per party per trip.
    - \$11.33 per person per trip.
    - \$309 in the past year on bicycles, bicycle supplies, clothing, shoes, and other trail-related expenses.
    - On average, trip expenses covered 1.52 people (1.43 adults and 0.09 children)
  - **Nonlocal day visitors** (44%) spent on average:
    - \$55.53 per party per trip.
    - \$30.05 per person per trip.
    - \$355 in the past year on bicycles, bicycle supplies, clothing, shoes, and other trail-related expenses.
    - On average, trip expenses covered 1.98 people (1.88 adults and 0.10 children).
  - **Hotel, motel and B&B visitors** (14%) spent on average:
    - \$700 per party per trip.
    - \$297.30 per person per trip.
    - \$280 per person per night.
    - \$122.60 per person per night.
    - \$503 in the past year on bicycles, bicycle supplies, clothing, shoes, and other trail-related expenses.
    - On average, trip expenses covered 2.54 people (2.37 adults and 0.17 children).

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<sup>3</sup> MGM2. Visitor spending leads to both **direct effects** (jobs, income, value added in the businesses that receive money directly from visitors e.g. motels, restaurants, attractions, retail stores) and **indirect effects** (from tourism businesses buying goods and services from other industries in the region, and households re-spending income earned from visitor spending). **Sales** are goods and services sold by firms within the region. **Jobs** are those supported by these sales. **Payroll** is wage and salaries paid by these firms including sole proprietor's income and worker benefits. **Value added** includes personal income plus rents and profits plus indirect business taxes.

- **Campground visitors** (10%) spent on average:
  - \$231 per party per trip.
  - \$141 per person per trip.
  - \$84 per party per night.
  - \$43 per person per night.
  - \$375 in the past year on bicycles, bicycle supplies, clothing, shoes, and other trail-related expenses.
  - On average, trip expenses covered 2.15 people (1.69 adults and 0.46 children).
- 1% of Katy Trail visitors spent the night with friends or relatives.

## Visitor Information

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- There were a total of 125,672 party-night visits<sup>4</sup> to the Katy Trail in 2011.
- 40% of party-night visits were local day trips.
- 44% of party-night visits were nonlocal day trips.
- 11% of party-night visits were hotel/motel/B&B visitors.
- 4% of party-night visits were campground visitors.
- 31% of all visitors were local day visitors.
- 33% of visitors were local visitors (defined as residents of a ZIP along the trail who traveled less than 30 miles to reach the trailhead) and 67% of visitors were nonlocal.
- About 93% of visitors were from Missouri, 6% from out-of-state.
- The average distance traveled to reach the Katy Trail was 83 miles.
  - Distance traveled ranged from 0.1 miles to 2,100 miles
- 74% of visitors visited the Katy Trail as part of a day trip and 26% of visitors visited the Katy Trail as part of an overnight trip.
- 21% of visitors were first-time visitors.
  - First-time visitors spent significantly more money than returning visitors and were more satisfied with the Katy Trail than returning visitors.
- The average visitor party size was 3.21 people, consisting of 2.76 adults and 0.45 children.
- Average time spent in and around the Katy Trail was 2 hours and 49 minutes for day visitors and 2.51 nights for overnight visitors.
- 37% of visitors were very familiar with the Katy Trail.

## Activities

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- 87% of respondents said the Katy Trail was the main reason for their visit to the area.
- 84% of visitors participated in bicycling.
  - Average distance biked was 46 miles per trip.
- 20% of visitors participated in walking.
  - Significantly more local visitors walked, as compared to nonlocal visitors.

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<sup>4</sup>MGM2 analyzes spending on a per-party rather than per-person basis to avoid double counting shared expenses (lodging, gasoline) and properly account for children. "Party-night visit" refers to a single visit, whether or not the visitor(s) stayed overnight. For analysis, the number of party-nights for local and nonlocal day visitors is set to 1.

- Average distance walked was 1.23 miles.
- 19% of visitors visited a small town along the trail.
  - Significantly more nonlocal visitors visited a small town, as compared to local visitors.
- 13% of visitors visited a local winery.
- 12% of visitors visited a historical attraction related to the Katy Trail.
- 10% of visitors went shopping/antiquing.
- 9% of visitors ran or jogged on the Katy Trail.
- 4% of visitors visited friends and relatives in the area.
- Less than 1% of visitors participated in horseback riding on the Katy Trail.



## Seasonal Usage

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- 90% of visitors visited the Katy Trail at least once every two to three months during the fall.
- 88% visited at least once every two to three months during the summer.
- 86% visited at least once every two to three months during the spring.
- 51% visited at least once every two to three months during the winter.

## Satisfaction

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On a scale of one to five, with one being 'not at all satisfied' and five being 'very satisfied,' visitors rated the following trail attributes:

- Katy Trail overall – 4.62.
- Cleanliness of the trail corridor – 4.50.
- Directional signs to the trailheads – 4.39.
- Trail safety – 4.38.
- Exhibits/interpretive panels – 4.35.
- Information provided at trailheads about local community services – 4.33.
- Maintenance/upkeep of trail facilities – 4.27.
- Trail surface – 4.13.
  - High relative importance indicates that improving trail surface would have the largest impact on overall satisfaction.
- Restroom cleanliness – 4.06.
  - Lowest relative importance, as compared to all other measures indicates that improving restroom cleanliness will have the smallest effect on overall satisfaction.
- Drinking water availability at the trailheads – 3.46.
  - Low relative importance, as compared to all other measures indicates that improving water availability at the trailheads will have a smaller effect on overall satisfaction, as compared to other improvements.

On a scale of one to five with one being 'not at all satisfied' and five being 'very satisfied,' visitors rated the following community attributes:

- Restaurant/dining opportunities – 3.90.
- Overnight lodging – 3.87.
- Restroom availability in the communities – 3.81.
- Drinking water availability in the communities – 3.56.
  - The study indicates that visitors place a high relative importance on drinking water availability in the communities, so improving that attribute will have a large effect on improving overall satisfaction.
- Food/groceries – 3.56.
  - The study indicates that visitors place a high relative importance on improving food/groceries, so improving that attribute will have a large effect on improving overall satisfaction.
- Bicycle repair/maintenance services – 3.46.

- The study indicates that visitors place a high relative importance on improving bicycle repair/maintenance services, so improving that attribute will have a large effect on improving overall satisfaction.
- Campgrounds – 3.36.
  - The study indicates that visitors place a low relative importance on improving campgrounds, so improving that attribute will have less effect on improving overall satisfaction, as compared to other improvements.
- Shuttling services – 3.40.
  - The study indicates that visitors place a low relative importance on improving shuttling services, so improving that attribute will have less effect on improving overall satisfaction, as compared to other improvements.

## Demographics

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- 75% of respondents were male.
- Average visitor age was 52 years old.
- An average of 2.02 adults and 0.39 children live in visitor households.
- 71% of visitors were married, 34% had income of \$100,000 or more, 31% completed a four-year degree, and 97% were Caucasian.

## Introduction to Katy Trail State Park

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Katy Trail State Park is the nation's longest completed rail-trail project – approximately 240 miles of scenic trail built for bicycling, hiking, walking and running.

The Katy Trail occupies a segment of rail corridor that once carried the Missouri-Kansas-Texas Railroad (a.k.a., the Katy). In 1986 the railroad ceased operations along this route, and the Missouri State Parks system acquired the right-of-way through the National Trails System Act.

The Katy Trail has a rich history in Missouri and in our country. The segment between St. Charles and Boonville is a non-motorized section of the Lewis and Clark National Historic Trail. The Katy Trail also is part of the American Discovery Trail and is designated a Millennium Legacy Trail.

The first segments of the Katy Trail opened in the early 1990s but the trail suffered extensive damage during the floods of 1993 and 1995. Construction resumed and in 1996, a ceremony in Jefferson City connected the eastern and western segments to create the longest completed rail-trail in the nation. An additional 37-mile section of trail from Sedalia to Clinton was completed in 1999. In 2010, the Katy Trail celebrated its 20<sup>th</sup> anniversary.

The Katy Trail passes through some of Missouri's most scenic landscapes, from bluffs to wetlands and forests to prairies. The trail follows the Missouri River from the east for half of its length, and then meanders west to Clinton through peaceful farmland and small-town Missouri.

Despite the changes in landscape, the Katy Trail is relatively flat, with a finely crushed, compacted limestone gravel surface that makes it a prime recreational resource for walkers, bicyclists, joggers, even those in wheelchairs. Horseback riding is allowed on a 35-mile section between Clinton and Sedalia and a 15-mile section between Tebbetts and Portland.

Many of the towns along the Katy Trail offer services to trail users, with access from 26 official trailheads. Wineries, restaurants, B&B inns, motels, campgrounds and shops are abundant, and many depend on the Katy Trail for their customers.

This study was conducted to determine the economic impact of Katy Trail State Park visitors on the Missouri economy. Data collected included the types of users, such as walkers, runners, bicyclists and equestrians; visitor party size and demographics; the frequency and duration of visits; and spending related to visits. The data was analyzed using MGM2 economic impact modeling software.

In a separate part of the study, we also reviewed the state's current method for counting visitors at trailheads, and made recommendations for new attendance counting methodology.

## Methodology

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This study included an intercept survey with a short one-page screener/impression that was completed on-site at the Katy Trail and a take-home questionnaire that the visitor was asked to complete and mail back at the end of their trip. Information was collected from 12 trailheads.

The survey was based on the requirements of Money Generation Model (MGM2) software, which was originally developed by the National Park Service and has been used by other state park systems to estimate visitor spending and its impacts on local and state economies.

As per the recommendations of MGM2, visitors were sampled at the party level rather than as individuals to avoid double counting shared expenses and to properly account for children. One impression/screener and one questionnaire was given to each spending party visiting the Katy Trail during the survey period. The one-page impression/screener and questionnaire mailer are available in Appendices A and B, respectively.

Day visitors were asked how many hours they planned to spend in and around the Katy Trail. Overnight visitors were asked how many nights they planned to spend in and around the Katy Trail (screener question (r) 4 and q9).

Respondents were asked the number of adults and children in their travel party (s7 and q7), the activities they planned on participating in (s5) and ones they actually did participate in (questionnaire (q) question 12), whether or not the Katy Trail was the primary reason for their visit (s6), whether or not it was their first visit (s1 and q1) and how familiar they were with the Katy Trail (s2).

Questions on the mail-back questionnaire explored their activity usage (q10), frequency (q11), spending (q14 through q17), satisfaction with the Katy Trail (q18 and q19), satisfaction with community services related to the Katy Trail (q20) and various demographic questions.

A total of 1,015 on-site visitor impressions were collected using the screener questionnaire. 72.9% (n=740) of the visitor impressions were collected in the spring of 2011, and 27.1% (n=275) of the visitor impressions were collected in the summer and fall of 2011. Parties with more than 15 people were removed from the analysis, leaving a total of n=997 visitor impressions.

A total of 514 visitors (50.6%) completed and returned mail-back questionnaires. Of the questionnaires distributed in the spring, 49.6% (n=367) were returned; 53.4% of the fall questionnaires were returned. 71.4% of the mail-back questionnaires were collected in the spring of 2011 and 28.6% in the fall of 2011. Parties with more than 15 people were removed from the analysis, leaving a total of n=501 visitor questionnaires.

Visitors (those who completed the on-site impressions/screeners survey) and Users (those who returned mail-back questionnaires) were divided into segments based on two questions. Visitors were asked if their trip to Katy Trail State Park was part of a day trip or overnight trip (s3). Overnight users were further asked about the type of lodging they used, e.g. Hotel/Motel/Bed & Breakfast Inns (B&B), Campground and Visiting Friends or Relatives (VFR).

Day users were categorized as either local day or nonlocal day based on their ZIP code (Screener question 8). Local users include those who live in ZIP codes along the Katy Trail and traveled less than 30

miles to reach the trailhead; all others are nonlocal. The same definition was used to determine local/nonlocal status in the mail-back questionnaire (Questionnaire question 8 – segment; and question 27 - ZIP code).

The map below shows the home ZIP codes for visitors who completed the on-site screener/impression survey (997 visitors). The ZIP codes in red indicate the highest concentration of Katy Trail users who participated in the on-site (screening) survey. A color key in the inset shows the number of visitors surveyed per ZIP code.

- 140 ZIP codes contained 1 to 5 visitor parties surveyed.
- 11 ZIP codes contained 6 to 10 visitor parties surveyed.
- 5 ZIP codes contained 11 to 15 visitor parties surveyed.
- 13 ZIP codes contained 16 to 20 visitor parties surveyed.
- No ZIP code contained more than 20 visitor parties surveyed.

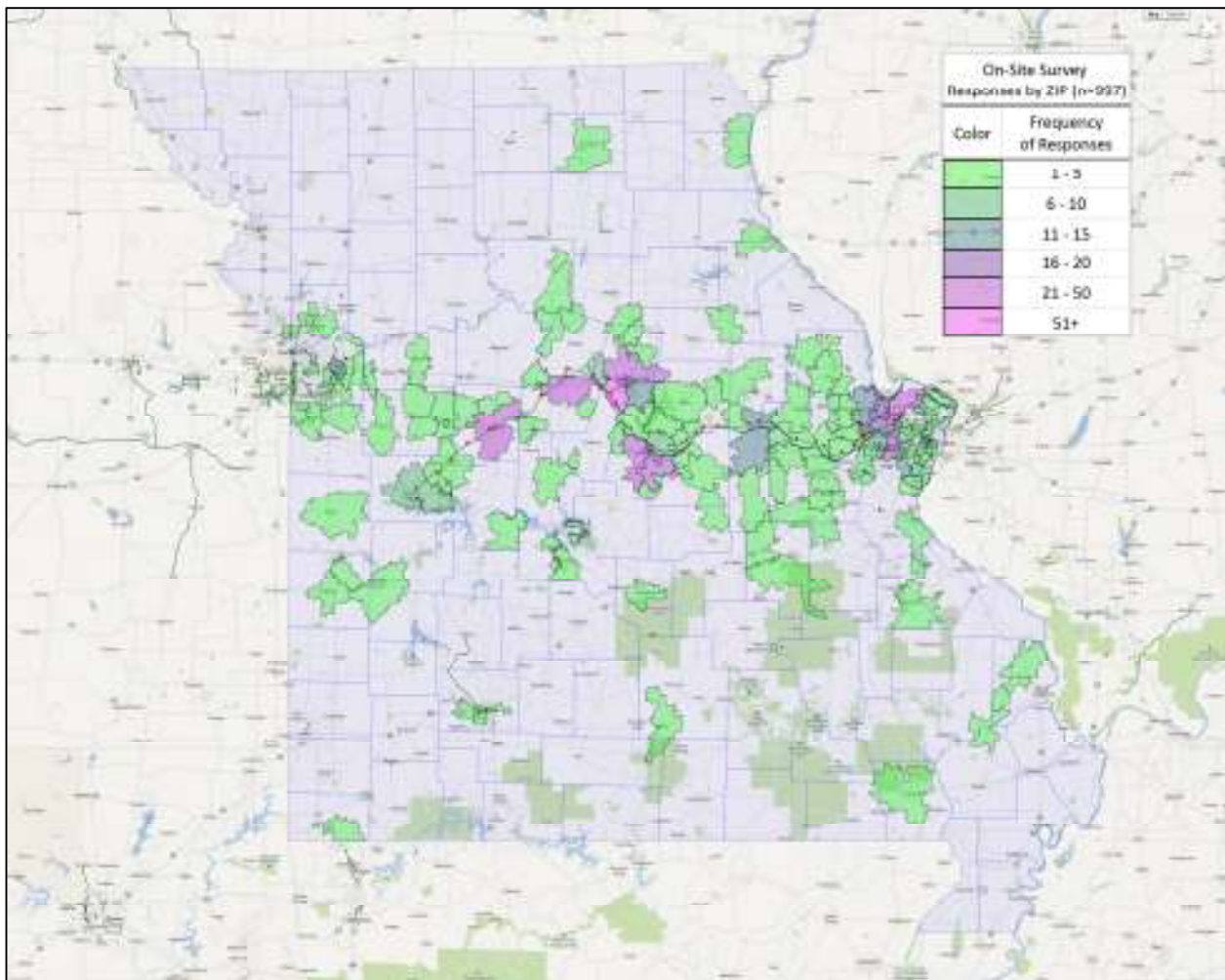


Figure 2 - On-Site Survey Responses by ZIP code

The map below shows the home ZIP codes for visitors who completed the mail-back survey (501 visitors). The ZIP codes in blue indicate the highest concentration of Katy Trail users who participated in the mail-back survey. A color key in the inset shows the number of visitors surveyed (impressions) per ZIP code.

- 101 ZIP codes had 1 to 5 visitor parties return questionnaires.
- 14 ZIP codes had 6 to 10 visitor parties return questionnaires.
- 3 ZIP codes had 11 to 15 visitor parties return questionnaires.
- 4 ZIP codes had 16 to 20 visitor parties return questionnaires.
- No ZIP code had more than 20 visitor parties return questionnaires.

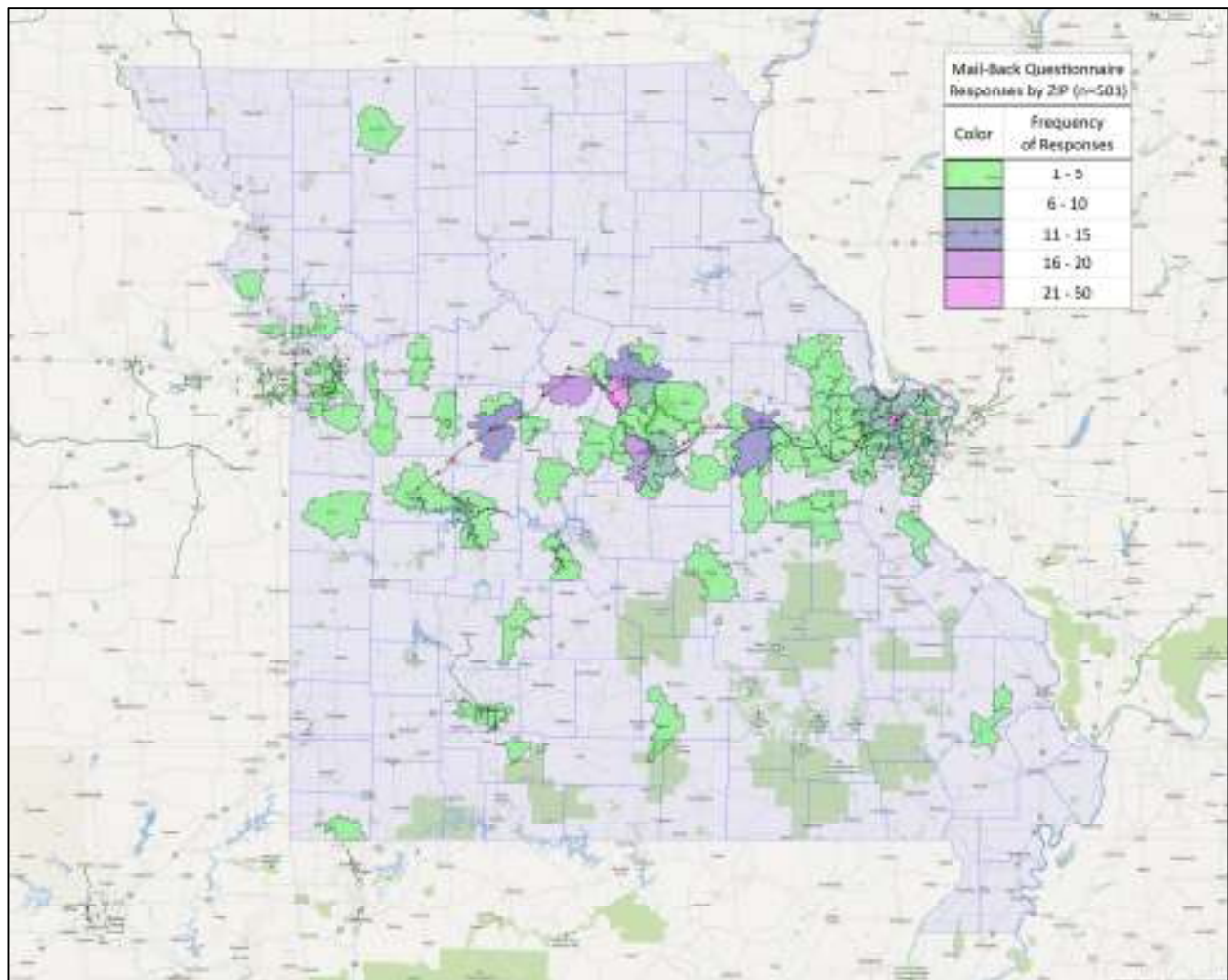


Figure 3 - Mail-Back Questionnaire Responses by ZIP code

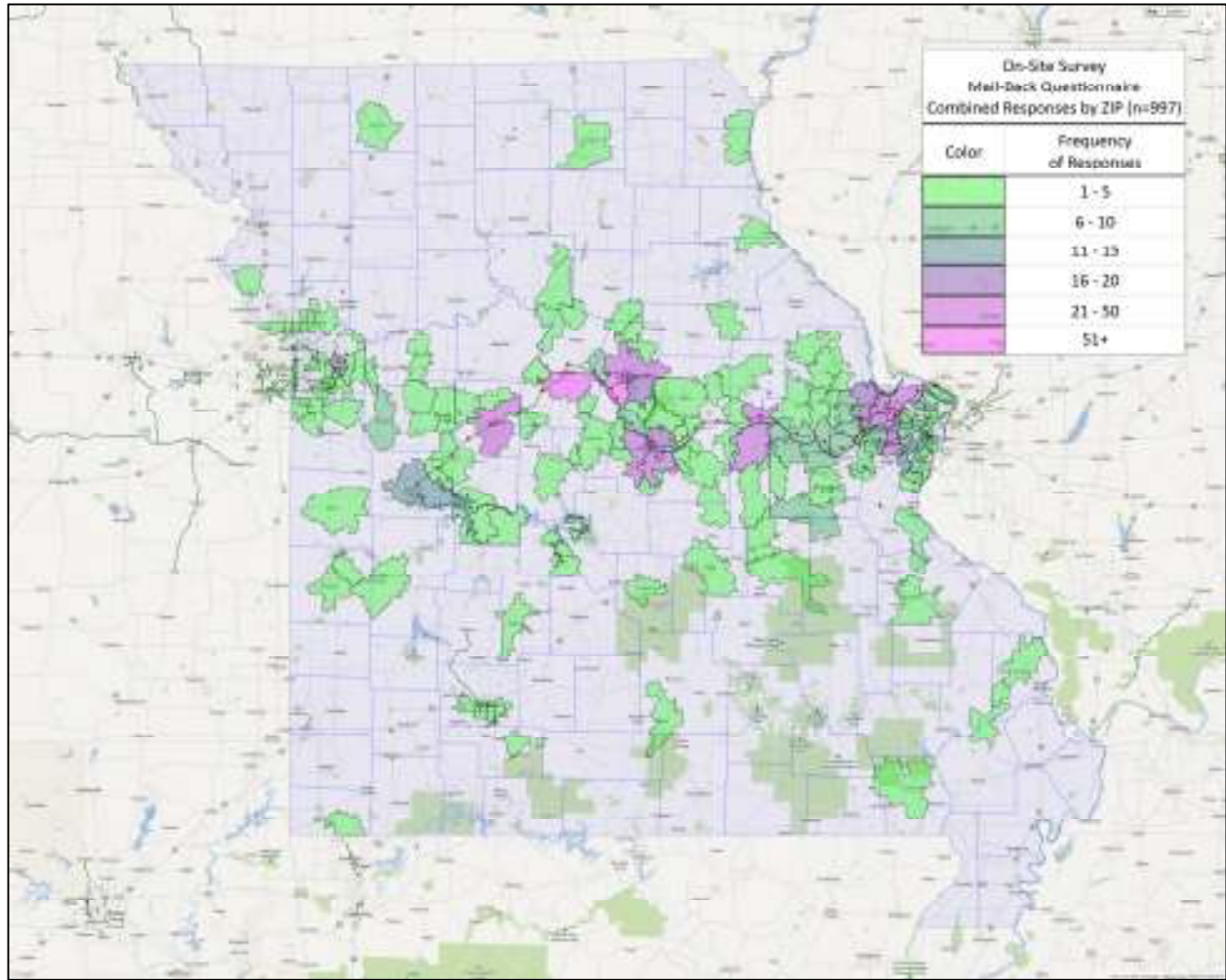


Figure 4 - Combined Responses - On-Site Survey and Mail-Back Questionnaire

## Visitor Segments

- **Day Visitor - Local:** Visitors who lived in a ZIP code adjoining the Katy Trail, who traveled less than 30 miles to reach the trailhead and who indicated they were on a day trip<sup>(</sup>
- **Day Visitor – Non-Local:** Visitors who live in a ZIP code that does not contain a part of the Katy Trail and who indicated they were on a day trip.
- **Overnight Visitor – Lodging:** Visitors who indicated that they were on an overnight trip and who stayed at a hotel, motel, or B&B.
- **Overnight Visitor – Campground:** Visitors who indicated that they were on an overnight trip and who stayed at a campground.
- **Overnight Visitor – VFR:** Visitors who indicated that they were on an overnight trip and who were staying/visiting friends or relatives in the area

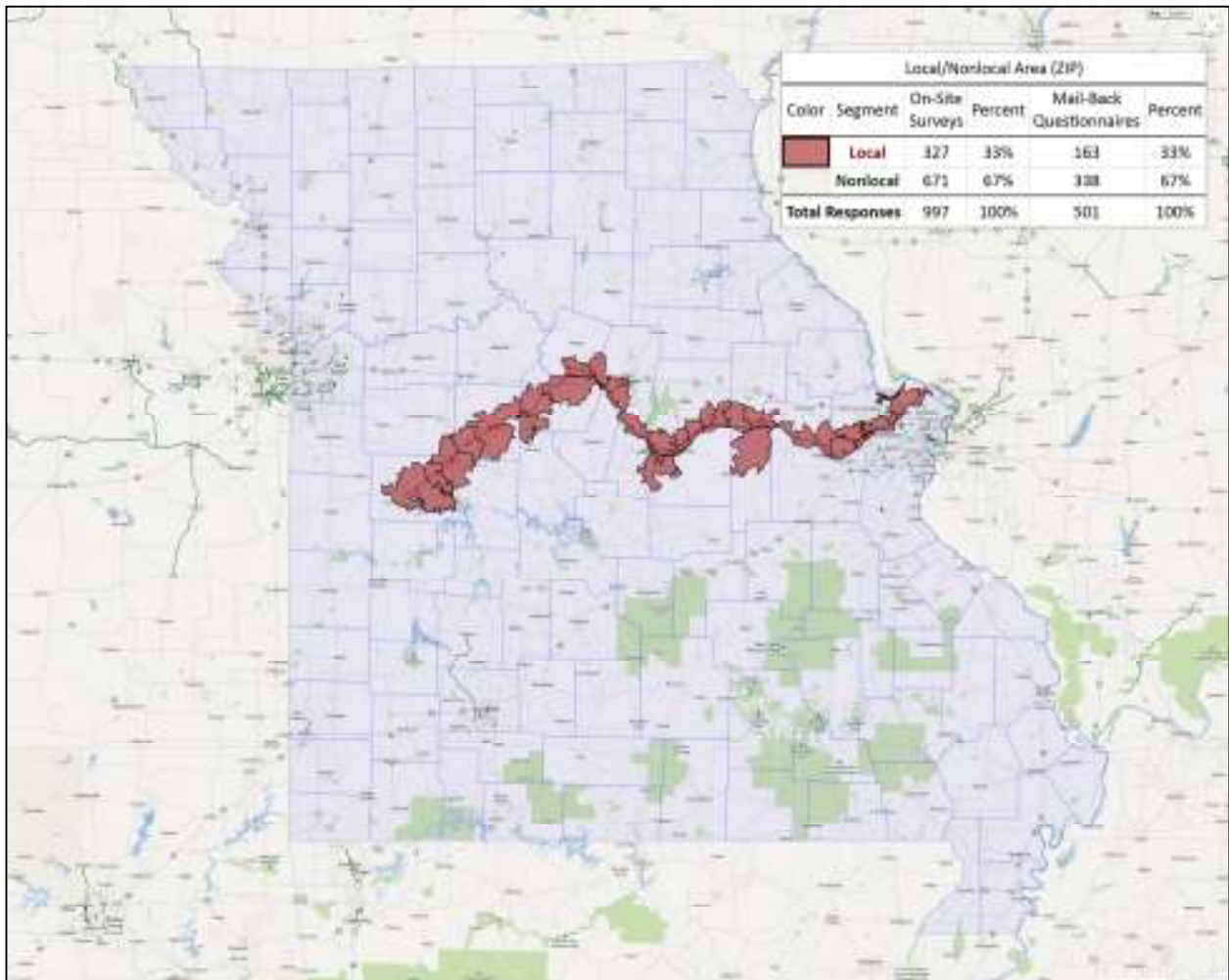


Figure 5 - Local Users (live in ZIP codes along the Katy Trail and traveled less than 30 miles to the trailhead)



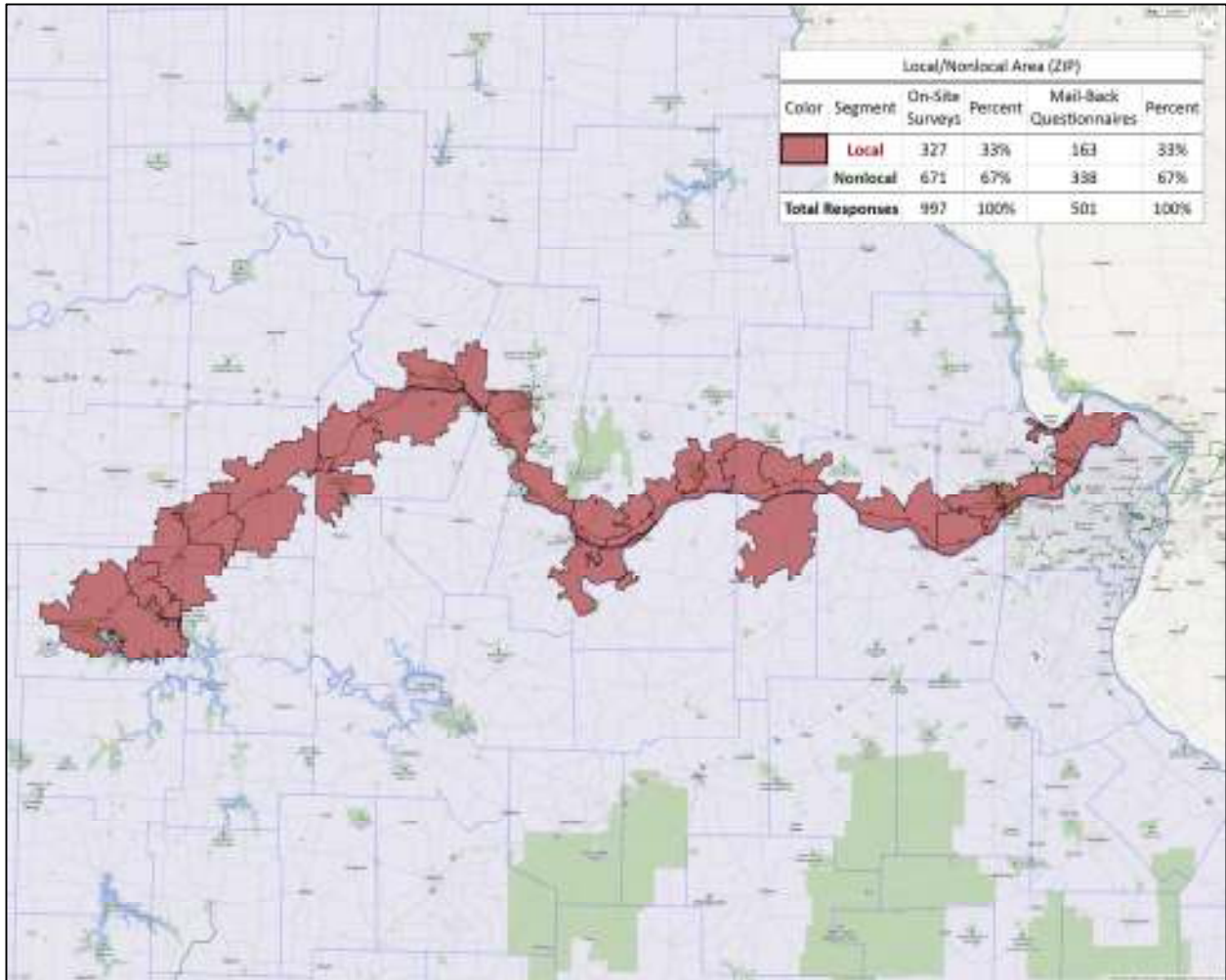


Figure 6 - Katy Trail Local Area (detail)

## Tabulation and Data Analysis

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The following statistical techniques were used to compile this report.

- **Descriptive Statistics:** Includes frequency distributions, means, variances, and other statistical measures. Used to describe the composition of the survey sample and provide preliminary data examinations.
- **T-Test:** Statistical test to assess whether the means of two groups are statistically different from one another, e.g. Males vs. Females.
- **Crosstab:** Cross-tabulations in order to examine frequencies of observations that belong to specific categories on more than one variable.
- **Bivariate Correlation:** A bivariate (two variable) correlation measures the strength of association between two variables on a scale of -1.0 to 1.0. A score of 1.0 indicates that two variables are perfectly correlated. The bivariate correlation is then squared to determine the amount of shared variance between the two variables, a measure known as derived or relative importance.

## Findings

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### Screener/Impression Findings

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#### First-time vs. Returning Visitors

- 21% of all respondents were first-time visitors to Katy Trail State Park and 79% were returning visitors.
- 46% of overnight visitors were first-time visitors, as compared to 13% of day visitors who were first-time visitors.
  - 29% of first-time day visitors were nonlocal, as compared to 6% who were local.
  - 53% of hotel, motel and B&B visitors and 41% of campground visitors were first-time visitors, significantly greater than both local and nonlocal day visitors.
- 31% of visitors with children in the party were first-time visitors, as compared to 20% of visitors with no children.
- 31% of parties with three or more people were new visitors, as compared to 22% of parties with two people and 9% of single-person parties.
- 9% of first-time visitors were local (i.e. lived in the ZIP code and traveled less than 30 miles to reach the trail) and 91% were nonlocal.
- 39% of returning visitors were local (i.e. lived in the ZIP code and traveled less than 30 miles to reach the trail) and 61% were nonlocal.
- 82% of first-time visitors were from Missouri, as compared to 97% of returning visitors.
- 44% of first-time visitors were on a day trip and 56% were on an overnight trip.
  - First-time day visitors spent an average of 3.38 hours (3 hours and 23 minutes) in and around Katy Trail State Park, significantly more time than returning visitors who spent an average of 2.75 hours (2 hours and 45 minutes) in and around the Katy Trail.
  - First-time overnight visitors spent an average of 2.40 nights in and around the Katy Trail.
  - 36% of first-time overnight visitors stayed in a hotel, motel or B&B inns, and 17% stayed in a campground.

#### Local vs. Nonlocal Visitors

- 33% of visitors were local and 67% of visitors were nonlocal.
  - 9% of nonlocal visitors were from outside of Missouri.
- 29% of first-time visitors were nonlocal, as compared to 6% of returning visitors.
- 45% of local visitors said they were very familiar with the Katy Trail, as compared to 33% of nonlocal visitors.
- 93% of local visitors were on a day trip, as compared with 65% of nonlocal visitors.
- Nonlocal visitors spent 3.15 hours (3 hours and 9 minutes) in and around the Katy Trail, as compared to local visitors who spent 2.37 hours (2 hours and 22 minutes) in and around the Katy Trail.
- 90% of nonlocal visitors participated in bicycling, as compared to 72% of local visitors.
- 17% of local visitors participated in running/jogging, as compared to 5% of nonlocal visitors.

- 36% of local visitors participated in walking, as compared to 13% of nonlocal visitors.
- 22% of nonlocal visitors visited a small town along the trail, as compared to 13% of local visitors.
- 5% of nonlocal visitors visited friends or relatives in the area, as compared to 2% of local visitors.
- 14% of nonlocal visitors went shopping/antiquing, as compared to 2% of local visitors.
- 16% of nonlocal visitors visited a historical attraction related to the Katy Trail, as compared to 4% of local visitors.
- 18% of nonlocal visitors visited a winery, as compared to 3% of local visitors.
- 89% of nonlocal visitors said the Katy Trail was the primary reason for their trip to the area, as compared to 83% of local visitors.
- On average, nonlocal visitors had 3.65 people per party, as compared to local visitors that had 2.30 people per party.

### Familiarity with the Katy Trail

- 37% of respondents said they were very familiar with the Katy Trail.
- 45% of local visitors said they were very familiar with the Katy Trail, as compared to 33% of nonlocal visitors.
- 42% of day visitors said they very familiar with the Katy Trail, as compared to 23% of overnight visitors.
  - 45% of local day visitors and 39% of nonlocal day visitors were very familiar with the Katy Trail, compared to 22% of hotel, motel and B&B visitors and 20% of campground visitors.
- 45% of return visitors said they were very familiar with the Katy Trail, as compared to 6% of first-time visitors.
- 40% of parties without children said they were very familiar with the Katy Trail, as compared to 20% of parties with children.
- 42% of single person and 40% of parties with two people said they were very familiar with the Katy Trail, as compared to 27% of parties with three or more people.
- 13% of respondents said they were not at all familiar with the Katy Trail.

### Travel Party

For the purpose of this study, groups of 16 or more were not included in the analysis to avoid skewing party size. The study did, however, include camping groups of up to 15 and a number of such groups were counted during the study period. Camping groups ranged from one to 15 people.

- The average visitor party size was 3.21 people.
  - The average visitor party consisted of 2.76 adults and 0.45 children.
- Parties with first-time visitors averaged 4.14 people, significantly greater than parties with returning visitors, which averaged 2.96 people.
- The average party size for “very familiar” parties was 2.59, significantly less than parties that were not very familiar, which averaged 3.58 people.
- Local visitor party sizes averaged 2.30 people, significantly less than nonlocal visitor party sizes, which averaged 3.65.

- Overnight visitor parties averaged 5.21 people, significantly greater than day visitors, which averaged 2.51 people per party. Visitor parties ranged from one person to 15.
  - Day parties averaged 2.29 adults.
    - Local day visitor parties averaged 1.92 adults, as compared to 3.17 adults in nonlocal day parties.
  - Overnight parties averaged 4.12 adults, significantly greater than day parties.
    - Overnight campground visitors averaged 5.17 adults per party, significantly greater than hotel, motel and B&B visitors, which averaged 3.72 adults per party.
    - Overnight campground visitors averaged 2.68 children per party, significantly greater than all other types of visitor parties.
- Parties with children averaged 6.42 people on average, significantly greater than parties without children, which averaged 2.63 people.

#### Day Visitors - Hours Spent in and Around the Katy Trail

- Average time spent in and around the Katy Trail was 2.83 hours (2 hours and 50 minutes).
  - Nonlocal day visitors spent an average of 3.15 hours (3 hours and 9 minutes) in and around the Katy Trail, significantly longer than local day visitors who spent an average of 2.37 hours (2 hours and 22 minutes).
- First-time day visitors spent an average of 3.38 hours (3 hours and 23 minutes) in and around the Katy Trail, significantly longer than returning day visitors who spent an average of 2.75 hours (2 hours and 45 minutes).
- Day parties with three people or more spent an average of 3.68 hours (3 hours and 41 minutes) in and around the Katy Trail, significantly longer than day parties with two people, which averaged 2.74 hours (2 hours and 44 minutes), and day single-person parties which averaged 2.39 hours (2 hours and 23 minutes).

#### Overnight Visitors –Nights Spent in and Around the Katy Trail

- Average number of nights spent in and around the Katy Trail was 2.51 nights.
- “Very familiar” visitors spent an average of 3.05 nights in and around the Katy Trail, significantly more than “not very familiar” visitors who averaged 2.26 nights.
- Hotel, motel and B&B visitors spent an average of 2.65 nights in and around the Katy Trail and campground visitors spent an average of 2.55 nights.
- Overnight visitors with children in the party stayed an average of 2.67 nights in and around the Katy Trail, significantly more than parties without children, which averaged 2.03 nights.

#### Reasons for Visiting the Katy Trail

- 87% of respondents said the Katy Trail was the main reason for their visit to the area.
  - 95% of campground visitors said the Katy Trail was the primary reason for their visit, significantly greater than local day visitors (83%), nonlocal day visitors (89%) and hotel, motel and B&B visitors (89%).

- 92% of “very familiar” visitors said the Katy Trail was the primary reason for their visit, as compared to 84% of “not very familiar” visitors who said the Katy Trail was the primary reason for their visit.
- 84% of respondents participated in **bicycling**.
  - 90% of nonlocal visitors participated in bicycling, as compared to 72% of local visitors.
  - 80% of day visitors participated in bicycling, as compared to 97% of overnight visitors.
    - 86% of nonlocal day visitors participated in bicycling, as compared to 70% of local day visitors.
    - 97% of overnight hotel, motel, and B&B visitors participated in bicycling, significantly greater than both local and nonlocal day visitors.
    - 99% of overnight campground visitors participated in bicycling, significantly greater than both local and nonlocal day visitors.
  - 89% of “very familiar” visitors participated in bicycling, as compared to 81% of “not very familiar” visitors.
  - 94% of parties of three or more participated in bicycling, as compared to 84% of parties with two people and 74% of parties with one person.
- 20% of respondents participated in **walking**.
  - 35% of local visitors participated in walking, as compared to 13% of nonlocal visitors who participated in walking.
  - 24% of day visitors participated in walking, as compared to 10% of overnight visitors who participated in walking.
    - 36% of local day visitors participated in walking, as compared to 15% of nonlocal day visitors, 11% of overnight hotel, motel and B&B visitors and 7% of overnight campground visitors who participated in walking.
  - 29% of single-person parties participated in walking, as compared to 21% of parties of two people and 12% of parties with three or more people.
- 19% of respondents **visited a small town along the trail**.
  - 28% of first-time visitors visited a small town along the trail, as compared to 16% of return visitors.
  - 22% of nonlocal visitors visited a small town along the trail, as compared to 13% of local visitors.
  - 34% of overnight visitors visited a small town along, as compared to 13% of day visitors who visited a small town along the trail.
    - 35% of overnight B&B visitors and 34% of overnight campground visitors visited a small town along the trail, significantly greater as compared to 15% of nonlocal day visitors and 12% of local day visitors visited a small town along the trail.
  - 24% of parties with three or more people and 21% of parties with two people visited a small town along the trail, as compared to 8% of single-person parties who visited a small town along the trail.
- 13% of respondents **visited a local winery**.

- 12% of respondents **visited a historical attraction related to the Katy Trail.**
- 10% of respondents **went shopping/antiquing.**
- 9% of respondents participated in **running/jogging.**
- 4% of respondents **visited friends or relatives in the area.**
- Less than 1% of respondents participated in **horseback riding.**

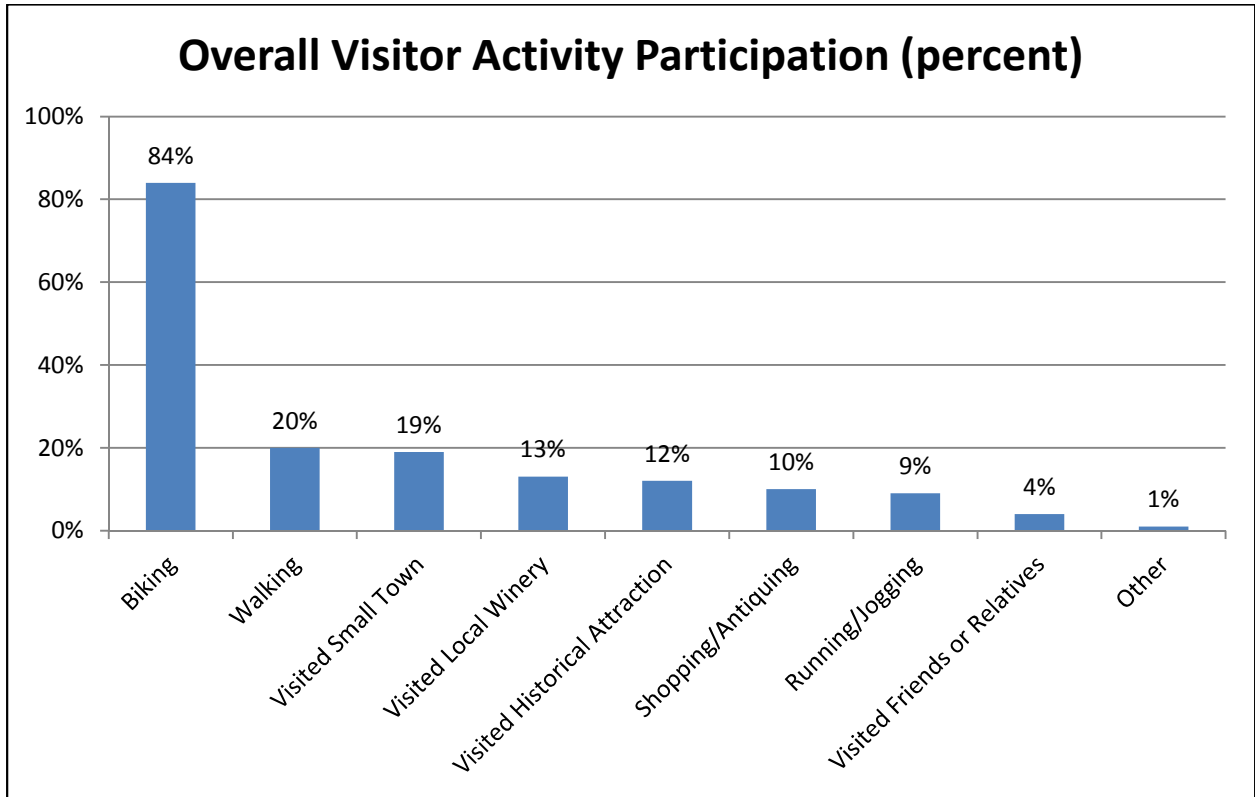


Figure 7 - Overall Visitor Activity

## Questionnaire Findings

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### Distance and Travel on the Katy Trail

- Visitors averaged 26 visits to the Katy Trail in the past year.
  - Local visitors visited the Katy Trail on average 51 times within the past year, as compared to nonlocal visitors who visited an average 13 times.
- The **average distance traveled to reach the Katy Trail** was 83 miles.
  - Local visitors traveled 8.81 miles, nonlocal day users traveled 31 miles, hotel, motel and B&B visitors traveled 273 miles and campground visitors traveled 209 miles to reach the Katy Trail.
- 15% of visitors **traveled one way on the trail** and 84% traveled **out and back**.
  - 36% of first-time visitors traveled one way, 46% of overnight visitors traveled one way and 20% of nonlocal visitors traveled one way.
  - 95% of local day visitors and 97% of nonlocal day visitors traveled out and back on the trail.
  - 49% of campground visitors and 52% of hotel, motel and B&B visitors traveled one way on the trail.
- The **average distance traveled on a bicycle** was 46 miles per trip.
  - First-time visitors biked an average of 97 miles, as compared to returning visitors who biked an average of 39 miles.
  - Nonlocal visitors biked an average of 55 miles, as compared to local visitors who biked an average 27 miles.
  - Overnight visitors biked an average 107 miles, significantly farther than day visitors who biked an average of 24 miles.
    - Overnight campground visitors biked an average distance of 136 miles, significantly greater than both local and nonlocal day visitors.
    - Overnight hotel, motel and B&B visitors biked an average distance of 112 miles, significantly greater than both local and nonlocal day visitors.
  - Both local and nonlocal day visitors biked an average of 24 miles.
  - Parties with three or more people biked an average of 61 miles, significantly farther than parties of two that biked an average of 38 miles.
  - 4% of visitors participated in an organized bicycle tour.
- The **average distance walked** was 1.23 miles.
- The **average distance jogged/ran** was 0.52 miles.
- The **average distance walked with a pet/dog** was 0.35 miles.



## Seasonal Visitation

### Spring (March, April and May)

- 61% of respondents visited Katy Trail State Park at least 2-3x per month during the **spring**.
- 86% visited at least once every 2-3 months during the spring.
- 13% never visited in the spring.

### Summer (June, July and August)

- 64% visited at least 2-3x per month during the **summer**.
- 88% visited at least once every 2-3 months during the summer.
- 12% never visited in the summer.

### Fall (September, October and November)

- 60% visited at least 2-3x per month during the **fall**.
- 90% visited at least once every 2-3 months during the fall.
- 10% never visited in the fall.

### Winter (December, January and February)

- 19% visited at least 2-3x per month during the **winter**.
- 51% visited at least once every 2-3 months during the winter.
- 48% never visited during the winter.

## Seasonal Visitation

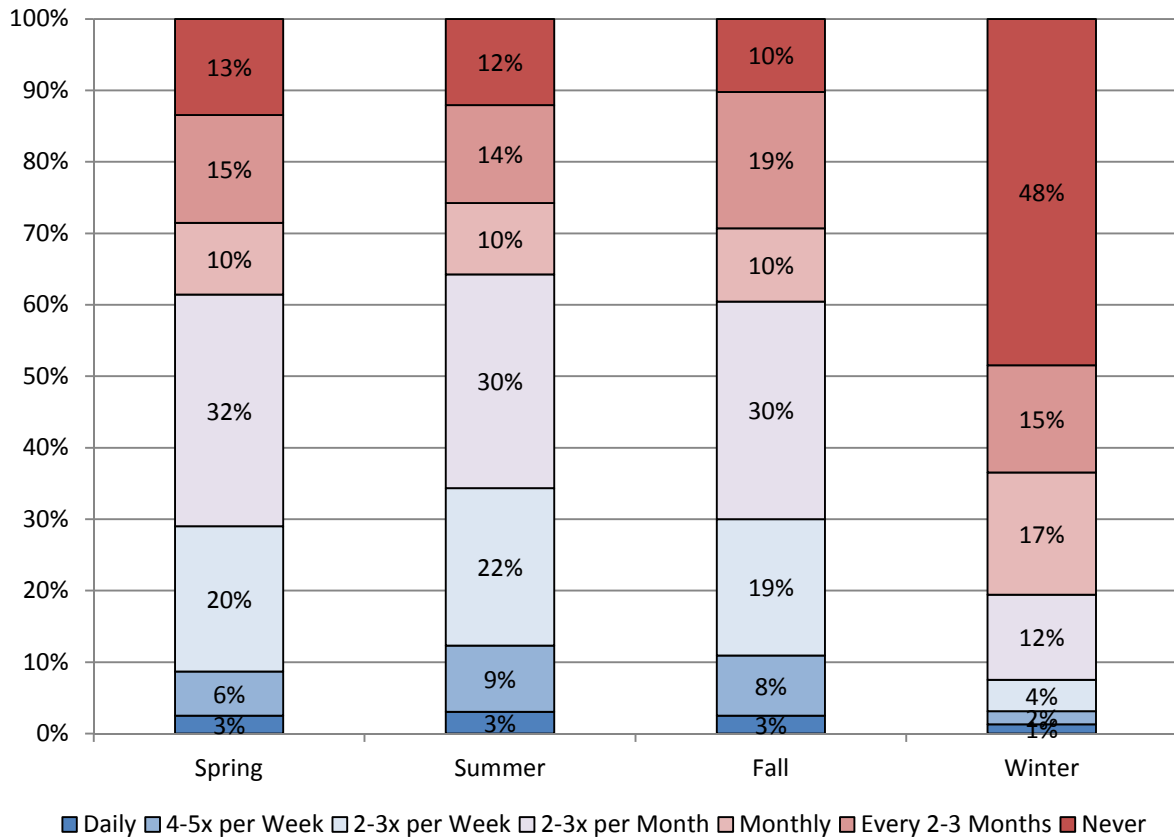


Figure 8 - Seasonal Visitation

## Evaluation of Katy Trail State Park Experience

### *Overall Satisfaction (question 18)*

- On a scale of one to five, overall satisfaction with Katy Trail State Park was 4.62.
  - 95% confident that overall satisfaction is between 4.56 and 4.68.
- 66% of respondents were very satisfied overall with Katy Trail State Park.
  - Local day visitors were the most satisfied, with 68% saying they were very satisfied, as compared to hotel, motel and B&B visitors (53%).

### *Importance/Performance*

Measuring relative importance presents statistical challenges, since survey respondents tend to rate everything as important. For example, most people surveyed about various factors related to grocery shopping would rate price, convenience, safety, location, quality of produce, friendly checkout staff and clean shopping carts as important. But when everything is important, nothing is relatively important, invalidating the measure and rendering the data non-actionable.

One way to more accurately measure importance in a satisfaction survey is to derive it statistically from the data set, using correlation to determine which factors contribute the most to overall satisfaction.

For this study, the satisfaction mean for each trail attribute in questions 19 and 20 (such as condition of trail surface) was correlated with overall satisfaction with Katy Trail State Park (question 18). The resulting number shows the strength of the correlation between satisfaction with a trail attribute and overall satisfaction with the Katy Trail.

That number was then squared to determine the relative importance of a particular trail attribute to the visitor's overall satisfaction. The relative importance of each attribute was then plotted against satisfaction (performance) on a grid to create the Importance/Performance charts.

The Importance/Performance charts offer guidance on using limited resources to obtain the greatest results, particularly in terms of user satisfaction. Improving areas of high importance will have a larger effect on improving overall satisfaction as compared to improving areas of lower importance.

The High Importance/High Performance "stars" appear in the upper right corner of the grid. Those attributes should be protected and promoted.

Areas of High Importance/Low Performance are shown in the upper left corner. Available resources should be prioritized to address these attributes.

Fewer resources can be devoted to attributes of Low Importance (lower right and left corners) since improving performance on Low Importance attributes will increase overall satisfaction less than improving performance on more important attributes. Areas of Low Satisfaction could increase in Importance if satisfaction (Performance) drops even further, but the impact on overall satisfaction is lower than other attributes.

Satisfaction with Trail Attributes

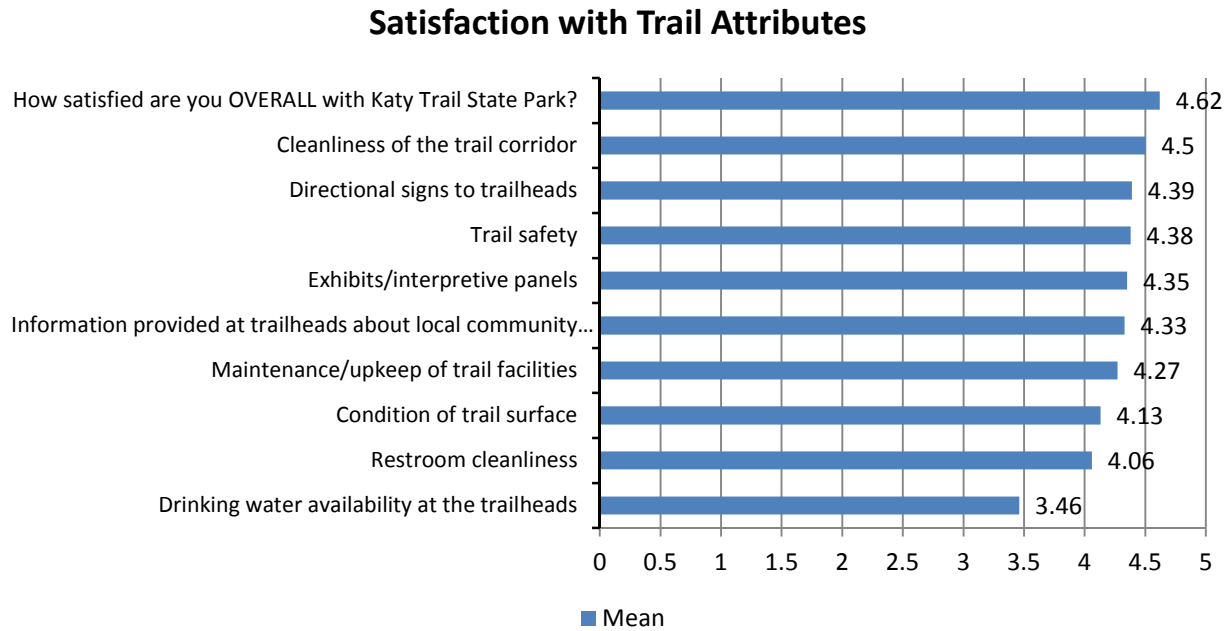


Figure 9 - Satisfaction with Trail Attributes

- 59% of respondents were very satisfied with the **cleanliness of the trail corridor**.
  - On a scale of one to five, satisfaction with cleanliness of the corridor was 4.50.
    - 95% confident that satisfaction is between 4.44 and 4.56.
  - First-time visitors were significantly more satisfied with cleanliness of the trail corridor (76%) as compared to returning visitors (56%).
  - Nonlocal visitors were significantly more satisfied with cleanliness of the trail corridor (62%) than local visitors (51%).
  - Nonlocal day visitors were significantly more satisfied with cleanliness of the trail corridor (65%) than local day visitors (50%).
- 55% of respondents were very satisfied with **directional signs to trailheads**.
  - On a scale of one to five, satisfaction with directional signs was 4.39.
    - 95% confident that satisfaction is between 4.31 and 4.47
- 51% of respondents were very satisfied with **trail safety**.
  - On a scale of one to five, satisfaction with trail safety was 4.38.
    - 95% confident that satisfaction is between 4.32 and 4.44.
  - First-time visitors were more satisfied with trail safety (66%) than return visitors (49%).
- 51% of respondents were very satisfied with the **exhibits/interpretive panels**.
  - On a scale of one to five, satisfaction with exhibits/interpretive panels was 4.35.
    - 95% confident that satisfaction is between 4.29 and 4.41.
  - Parties with two people were more satisfied with the exhibits/interpretive panels (56%) than single-person parties (44%).

- 53% of respondents were very satisfied with **information provided at trailheads about local community services**.
  - On a scale of one to five, satisfaction with information provided at trailheads about local community services was 4.33.
    - 95% confident that satisfaction is between 4.25 and 4.41
  - Parties with no children were more satisfied with information provided at trailheads about local community services (45%) than parties with children (37%).
- 45% of respondents were very satisfied with the **maintenance/upkeep of trail facilities**.
  - On a scale of one to five, satisfaction with maintenance/upkeep was 4.27.
    - 95% confident that satisfaction is between 4.19 and 4.35.
  - First-time visitors were more satisfied with maintenance/upkeep of trail facilities (60%) than return visitors (45%).
- 37% of respondents were very satisfied with **the condition of the trail surface**.
  - On a scale of one to five, satisfaction with condition of trail surface was 4.13.
    - 95% confident that satisfaction is between 4.05 and 4.21.
  - First-time visitors were more satisfied with the condition of the trail surface (51%) than returning visitors (37%).
  - Nonlocal day visitors were more satisfied with the condition of the trail surface (44%) than local day visitors (30%) and hotel, motel and B&B visitors (30%).
  - Parties with two people were more satisfied with the condition of the trail surface (40%); parties with three or more people were more satisfied (39%) than single-person parties (27%).
- 38% of respondents were very satisfied with **restroom cleanliness**.
  - On a scale of one to five, satisfaction with restroom cleanliness was 4.06.
    - 95% confident that satisfaction is between 3.98 and 4.14.
  - Campground visitors were significantly more satisfied with restroom cleanliness than local day users.
- 28% of respondents were very satisfied with **drinking water availability at the trailheads**.
  - On a scale of one to five, satisfaction with drinking water at trailheads was 3.46.
    - 95% confident that satisfaction is between 3.34 and 3.58.
  - Parties with no children were more satisfied with drinking water availability at the trailheads (29%) than parties with children (15%).

*Importance vs. Performance (Trail-related Attributes)*

| Importance vs. Performance - Trail-related attributes (q19)              |                    |                     |      |
|--|--------------------|---------------------|------|
|  | Person Correlation | Relative Importance | Mean |
| <b>How satisfied are you OVERALL with Katy Trail State Park? (q18)</b>   | 1                  | 1.000               | 4.62 |
| <b>Trail safety</b>  | 0.459              | 0.211               | 4.38 |
| <b>Maintenance/upkeep of trail facilities</b>                            | 0.457              | 0.209               | 4.27 |
| <b>Condition of trail surface</b>  | 0.433              | 0.187               | 4.13 |
| <b>Information provided at trailheads about local community services</b> | 0.387              | 0.150               | 4.33 |
| <b>Exhibits/interpretive panels</b>                                      | 0.356              | 0.127               | 4.35 |
| <b>Cleanliness of the trail corridor</b>                                 | 0.355              | 0.126               | 4.5  |
| <b>Drinking water availability at the trailheads</b>                     | 0.295              | 0.087               | 3.46 |
| <b>Directional signs to trailheads</b>                                   | 0.283              | 0.080               | 4.39 |
| <b>Restroom cleanliness</b>  | 0.229              | 0.052               | 4.06 |

Table 1 - Importance/Performance of Trail-Related Attributes

- Important trail-related attributes that are performing well and should be maintained include:
  - Maintenance/upkeep of trail facilities.
  - Trail safety.
  - Information at trailheads about local community services.
- Important trail-related attributes that are not performing well and are in need of improvement are include:
  - Condition of trail surface.
- Less important trail- related attributes that are performing well and can be de-emphasized include:
  - Exhibits/interpretive panels.
  - Cleanliness of the trail corridor.
  - Directional signs to trailheads.
- Less important attributes that are not performing well and can be de-emphasized include:
  - Drinking water availability at the trailheads.
  - Restroom cleanliness.

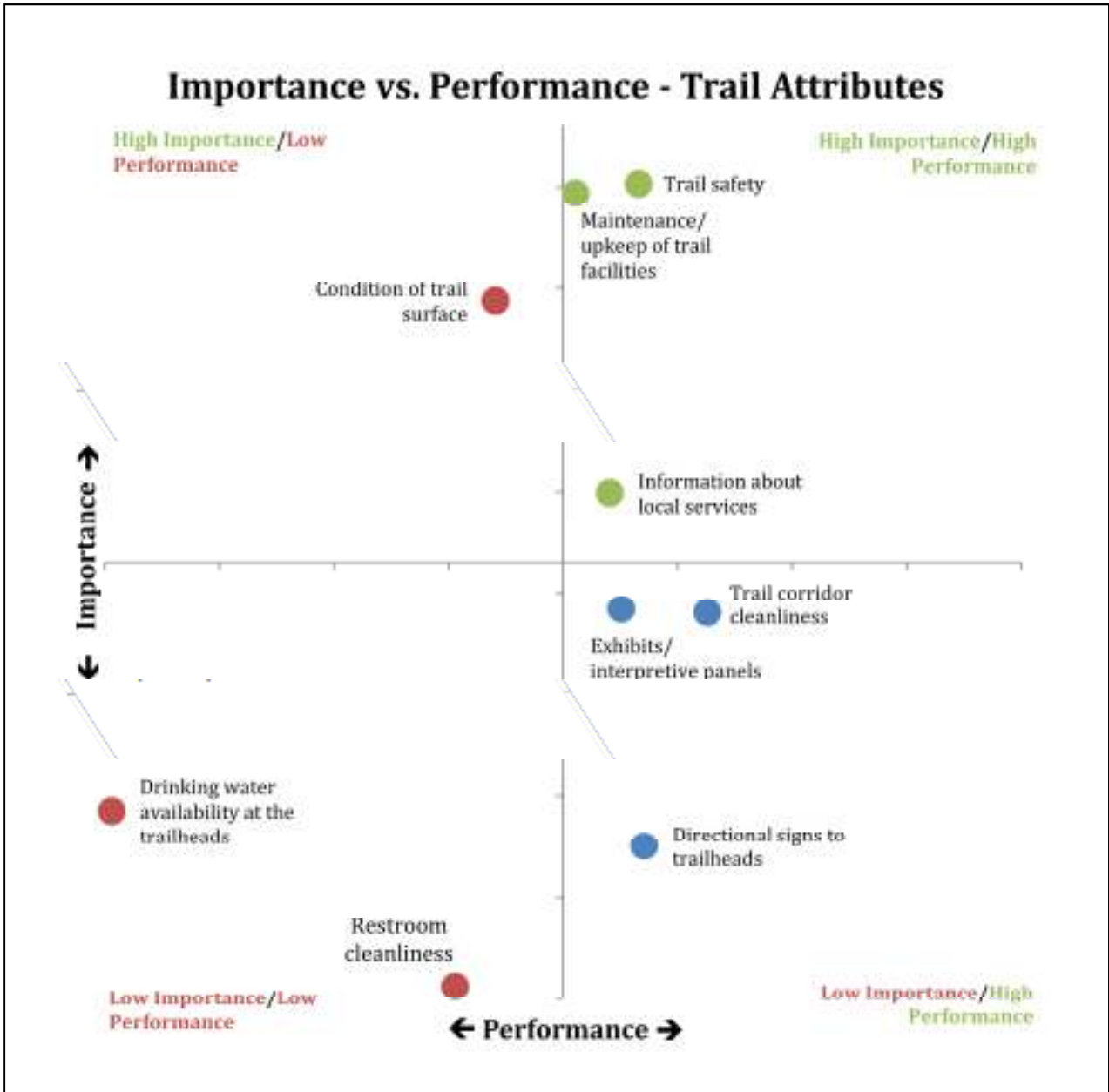


Figure 10 - Importance/Performance Trail Attributes

### *Satisfaction with Community Attributes*

- 28% of respondents were very satisfied with **restaurants/dining opportunities**.
  - On a scale of one to five, satisfaction with restaurants/dining opportunities is 3.9.
    - 95% confident that satisfaction is between 3.80 and 4.00.
  - Nonlocal day visitors were more satisfied with restaurant/dining opportunities (35%) than local day visitors (23%) and campground visitors (18%).
  - Parties with two people were more satisfied with restaurants/dining opportunities (32%) than single-person parties (20%).
- 29% of respondents were very satisfied with **other overnight lodging (hotels/motels, B&B inns)**.
  - On a scale of one to five, satisfaction with restaurants/dining opportunities is 3.87.
    - 95% confident that satisfaction is between 3.75 and 3.99.
- 29% of respondents were very satisfied with **restroom availability in the communities**.
  - On a scale of one to five, satisfaction with restroom availability in the communities is 3.81.
    - 95% confident that satisfaction is between 3.71 and 3.91.
  - First-time visitors were significantly more satisfied than return visitors.
  - Campground visitors and nonlocal day visitors were significantly more satisfied with restroom availability in the communities than local day visitors.
- 25% of respondents were very satisfied with **drinking water availability in the communities**.
  - On a scale of one to five, satisfaction with drinking water availability in the communities is 3.56.
    - 95% confident that satisfaction is between 3.44 and 3.68.
  - First-time visitors were more satisfied with drinking water availability in the local communities (46%) than return visitors (22%).
- 19% of respondents were very satisfied with **food/groceries**.
  - On a scale of one to five, satisfaction with food/groceries is 3.56.
    - 95% confident that satisfaction is between 3.44 and 3.68.
- 22% of respondents were very satisfied with **bicycle repair/maintenance services**.
  - On a scale of one to five, satisfaction with bicycle repair/maintenance services is 3.46.
    - 95% confident that satisfaction is between 3.32 and 3.60.
- 21% of respondents were very satisfied with **shuttling services**.
  - On a scale of one to five, satisfaction with shuttling services is 3.40.
    - 95% confident that satisfaction is between 3.18 and 3.61.
- 19% of respondents were very satisfied with **campgrounds**.
  - On a scale of one to five, satisfaction with campgrounds is 3.36.
    - 95% confident that satisfaction is between 3.18 and 3.54.

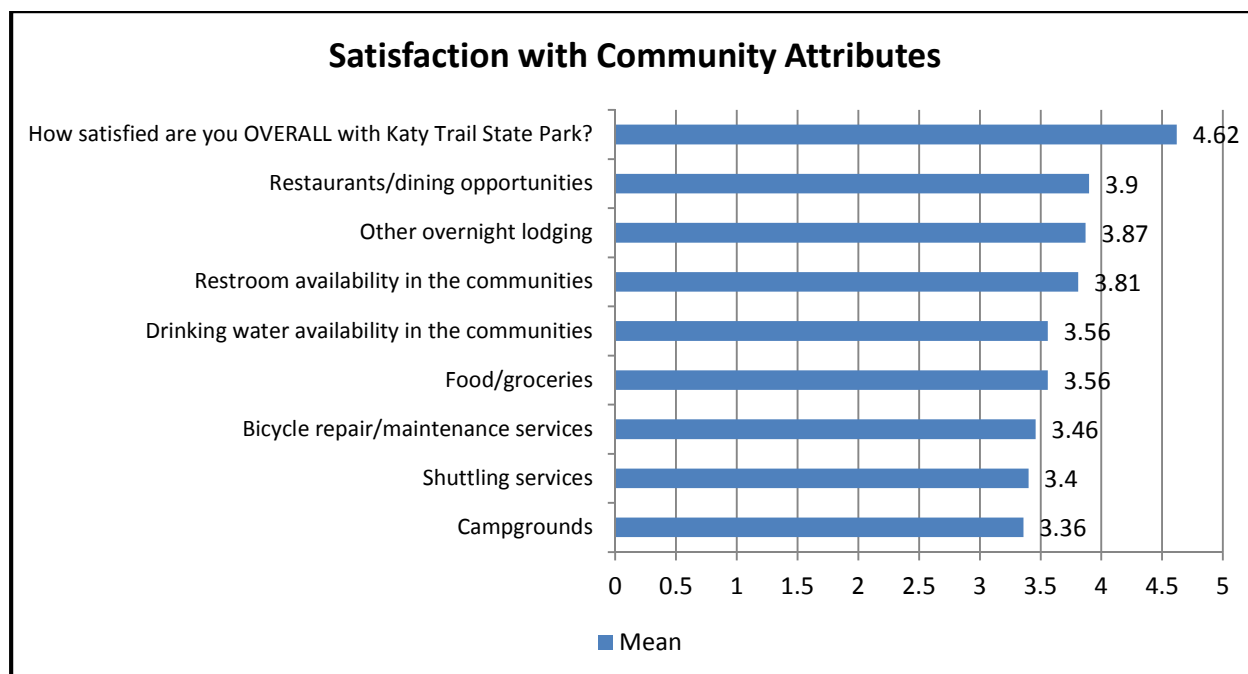


Figure 11 - Satisfaction with Community Attributes

#### Importance vs. Performance (Community Attributes)

Community-related attribute scores were correlated and the correlations were squared in order to determine the relative importance of each attribute. The relative importance of each community-related attribute then was plotted against satisfaction to determine performance. See **Tabulation and Data Analysis** on page 17 for a definition of relative importance.

| Importance vs. Performance – Community-related attributes (q20)        |             |                     |      |
|--|-------------|---------------------|------|
|  | Correlation | Relative Importance | Mean |
| <b>How satisfied are you OVERALL with Katy Trail State Park? (q18)</b> | 1           | 1.000               | 4.62 |
| <b>Restaurants/dining opportunities</b>                                | 0.398       | 0.158               | 3.9  |
| <b>Food/groceries</b>  | 0.364       | 0.132               | 3.56 |
| <b>Drinking water availability in the communities</b>                  | 0.348       | 0.121               | 3.56 |
| <b>Bicycle repair/maintenance services</b>                             | 0.343       | 0.118               | 3.46 |
| <b>Other overnight lodging</b>   | 0.25        | 0.063               | 3.87 |
| <b>Restroom availability in the communities</b>                        | 0.217       | 0.047               | 3.81 |
| <b>Shuttling services</b>  | 0.172       | 0.030               | 3.4  |
| <b>Campgrounds</b>   | 0.126       | 0.016               | 3.36 |

Table 2 - Importance/Performance Community-Related Attributes



- Important community-related attributes that are performing well and should be maintained include:
  - Restaurant/dining opportunities
- Important community-related attributes that are not performing well and are in need of improvement include:
  - Food/groceries.
  - Drinking water availability in the communities.
  - Bicycle repair/maintenance services.
- Less important community-related attributes that are performing well and can be deemphasized include:
  - Other overnight lodging.
  - Restroom availability in the community.
- Less important attributes that are not performing well and can be deemphasized include:
  - Shuttling services.
  - Campgrounds.



Figure 12 - Importance/Performance Community Attributes

## Demographics

- 75% of respondents were male.
  - 86% of single-person parties were male as compared to 74% of parties of two and 68% of parties with three or more visitors.
  - 79% of nonlocal visitors were male as compared to 69% of local visitors.
- Average respondent age was 52 years.
  - Hotel, motel and B&B visitors averaged 55 years old
  - Local day visitors averaged 53 years old while nonlocal day visitors averaged 50.
  - Parties without children averaged 52 years while parties with children averaged 42.
- An average of 2.02 adults and 0.39 children live in respondent households.
- 71% of respondents were married, 18% were single, 8% were divorced and 3% were other.
- 34% of respondents had annual income of \$100,000 or more.
  - 20% earned between \$75,000-\$99,999
  - 20% earned between \$50,000-\$74,999
  - 14% earned between \$35,000-\$49,999
  - 10% earned less than \$35,000 a year.
- 31% of respondents completed a four-year college degree
  - 27% completed graduate degrees
  - 23% completed some college or a two-year associate's degree
  - 10% completed high school or equivalent
  - 1% did not graduate high school.
- 97% of respondents were Caucasian, 1% were Hispanic and 1% were other, and less than 1% were Asian or African American.

## Suggestions and Comments (Open Ended)

Respondents were asked to share comments or suggestions regarding the Katy Trail.

| Q28. Comments or suggestions   |           |         |                  |
|--|-----------|---------|------------------|
|  | Responses |         | Percent of Cases |
|  | N         | Percent |                  |
| Love the trail/Great trail experience/Great job  | 55        | 27.20%  | 34.00%           |
| Keep up with maintenance/ Upkeep of trails/ They are great about upkeep  | 31        | 15.30%  | 19.10%           |
| Need more water (nonspecific)  | 23        | 11.40%  | 14.20%           |
| Need more signs/update current signs   | 9         | 4.50%   | 5.60%            |
| Would like to see the trail expanded   | 9         | 4.50%   | 5.60%            |
| Need more information provided to the visitors   | 8         | 4.00%   | 4.90%            |
| Make trailheads easier to find/access  | 6         | 3.00%   | 3.70%            |
| Need better bug control  | 6         | 3.00%   | 3.70%            |
| Add more dining options along the trail  | 5         | 2.50%   | 3.10%            |
| Need to maintain weeds/vegetation along the trail  | 3         | 1.50%   | 1.90%            |
| Fix the bridge at little Femme Osage Creek   | 3         | 1.50%   | 1.90%            |
| Need more restrooms (nonspecific)  | 2         | 1.00%   | 1.20%            |
| Clinton trailhead needs water and restroom   | 1         | 0.50%   | 0.60%            |
| McBaine bathrooms need better care   | 1         | 0.50%   | 0.60%            |
| Hindman Junction needs trashcans; water there too would be great.  | 1         | 0.50%   | 0.60%            |
| Parking lot at Weldon Spring is horrible   | 1         | 0.50%   | 0.60%            |
| From Treloar to McKittrick no cold water   | 1         | 0.50%   | 0.60%            |
| Trail from McKittrick to Dutzow had areas of "sand" that was dangerous when speeding along   | 1         | 0.50%   | 0.60%            |
| No water at stations Tebbetts and east to Machens  | 1         | 0.50%   | 0.60%            |
| More water, especially east of Jefferson City  | 1         | 0.50%   | 0.60%            |
| Lack of water at trailheads especially between McKittrick and Matson   | 1         | 0.50%   | 0.60%            |
| Fix the potholes in the parking lot at Dutzow  | 1         | 0.50%   | 0.60%            |
| Repair the surface between St. Charles and Defiance. Needs to be cleaned and smoothed. Potholes need to be filled in and smoothed. | 1         | 0.50%   | 0.60%            |
| There are no restrooms starting at St. Charles and following the trail south to highway 364.                                       | 1         | 0.50%   | 0.60%            |
| The Weldon Spring trailhead parking lot needs repair to the big pothole.   | 1         | 0.50%   | 0.60%            |
| Nothing  | 13        | 6.40%   | 8.00%            |
| Other  | 16        | 7.90%   | 9.90%            |
| Total  | 202       | 100.00% | 124.70%          |

Table 3

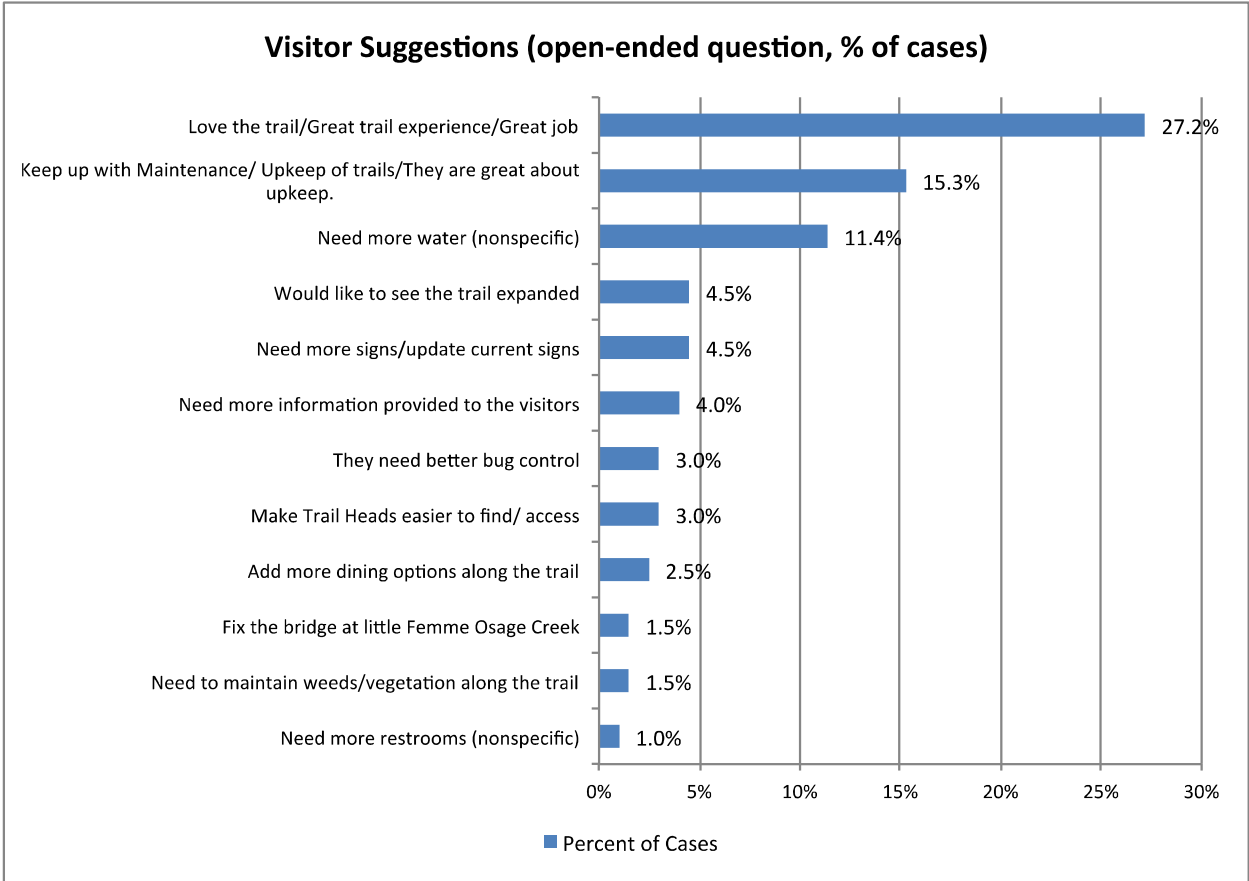


Figure 13 - Visitor Suggestions

### MGM2 Visitor Segments

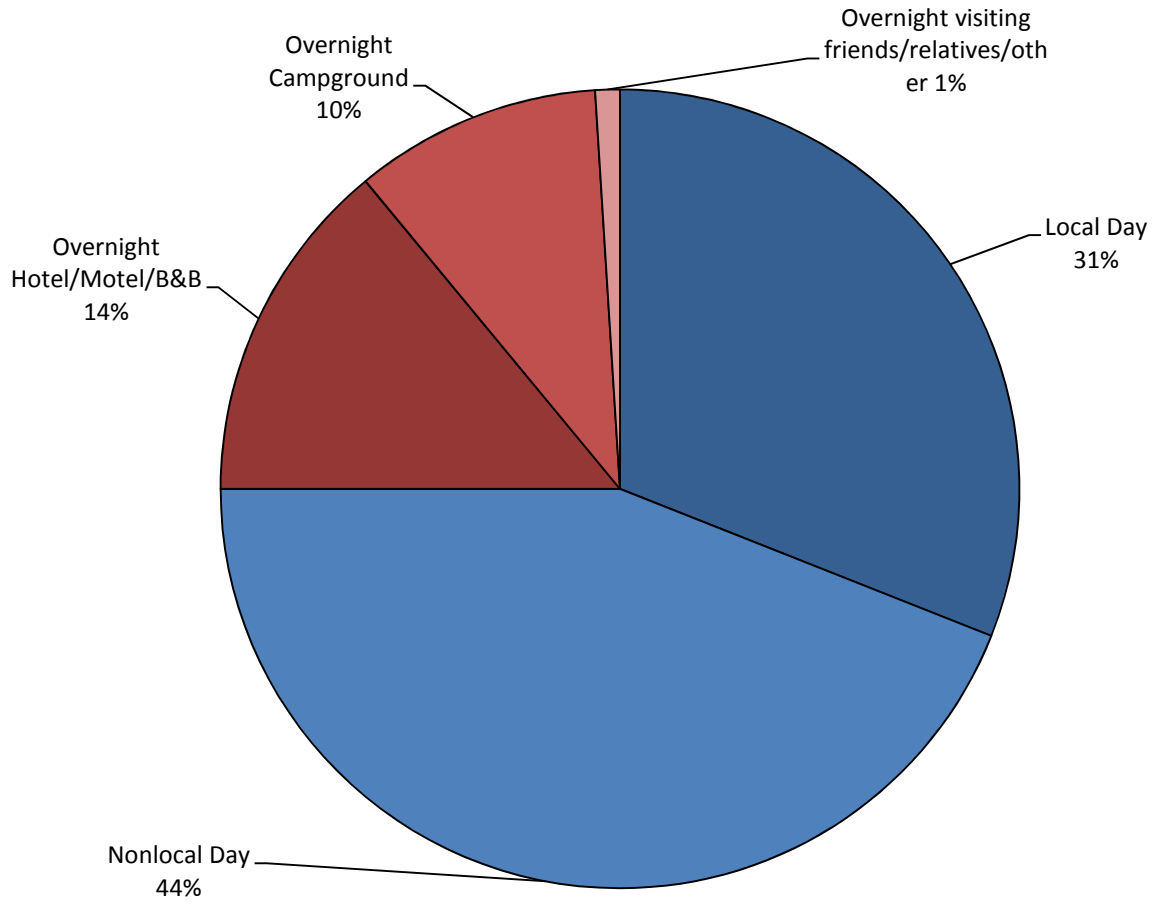


Figure 14 - MGM2 Visitor Segments

## Day Visitors

### Local Day Visitors

- 94% of local day visitors were returning visitors, significantly more than all other visitor segments
- 45% of local day visitors were very familiar with Katy Trail State Park, significantly more than overnight visitors.
- Local day visitors spent an average of 2.37 hours (2 hours and 22 minutes) in and around the Katy Trail.
- 70% of local day visitors bicycled.
- 17% of local day visitors participated in running/jogging and 36% participated in walking, significantly more than other visitor segments.
- 2% of local day visitors participated in shopping/antiquing, 2% visited a winery, 12% visited a small town along the trail and 2% visited a historical site related to the Katy Trail.
- 83% of local day visitors said the purpose of their visit was specifically to visit the Katy Trail.
- Local day visitor parties averaged 2.07 people overall.
  - Local visitor parties averaged 1.84 adults and 0.23 children.
- Local day visitors visited the Katy Trail an average 50 times in the past year, significantly more than nonlocal day visitors, overnight hotel, motel and B&B visitors or overnight campground visitors.
- No local day visitors surveyed participated in a guided bike tour.
- Local day visitors traveled an average distance of 8.68 miles to reach Katy Trail State Park.
- 95% of local day visitors traveled out and back on the trail, significantly more than overnight visitors.
- 68% of local day visitors were very satisfied overall with the Katy Trail.
  - Local day visitors were more satisfied than hotel, motel and bed & breakfast visitors.
- The average age of local day visitors was 53, significantly older than nonlocal day visitors (average age 50).
- On average, local day visitor parties spent per trip:
  - About \$6.66 on restaurants and bars.
  - About \$1.00 on groceries and take-out food.
  - About \$2.03 on snacks, water and beverages.
  - About \$4.80 on auto gas and oil.
  - About \$1.01 on other transportation expenses.
  - About \$0.13 on admissions (entertainment, recreations and museums).
  - About \$1.91 on shopping (clothes, souvenirs, etc.).
  - No money on equipment rental.
- Local day visitors spent about \$56.59 per party per trip (MGM2).
- Local day visitors spent about \$11.33 per person per trip.
- On average, local day visitor spending covered 1.52 adults, 0.09 children and 1.43 people total.
- In the past year, local day visitors spent the following on Katy Trail-related expenses:
  - About \$171 on bicycles.

- About \$60 on bicycle supplies.
- About \$29 on clothing.
- About \$32 on shoes.
- About \$17 on other trail-related expenses.

### *Non-Local Day Visitors*

- 17% of nonlocal day visitors were first-time visitors, significantly more than local day visitors.
- 39% of nonlocal day visitors were very familiar with Katy Trail State Park, significantly more than overnight visitors.
- Nonlocal day visitors spent an average of 3.15 hours (3 hours, nine minutes) in and around the Katy Trail, significantly longer than local day visitors.
- 86% of nonlocal day visitors bicycled (significantly more than local day visitors), 6% participated in running/jogging (significantly more than hotel, motel and B&B visitors) and 15% participated in walking (significantly more than campground visitors).
- 15% of nonlocal day visitors visited a small town along the trail and 3% visited friends or relatives in the area.
- 10% of nonlocal day visitors visited a winery, 7% participated in shopping/antiquing and 7% visited a historical attraction related to the Katy Trail, all significantly more than local day visitors.
- 89% of nonlocal day visitors said the Katy Trail was the primary reason for their visit to the area.
- Nonlocal day visitor parties averaged 2.82 people overall, significantly more than local day visitors.
  - Nonlocal day visitor parties averaged 2.60 adults, significantly more than local day visitors.
  - Nonlocal day visitor parties averaged 0.22 children.
- Nonlocal day visitors visited the Katy Trail an average of 18 times during the past year, significantly more than overnight visitors.
- 2% of nonlocal day visitors participated in an organized bike tour.
- Nonlocal day visitors traveled an average 31 miles to reach the Katy Trail, significantly farther than local day visitors.
- 97% of nonlocal day visitors traveled out and back on the Trail, significantly more than overnight visitors.
- 69% of nonlocal day visitors were very satisfied with the Katy Trail.
  - Nonlocal day visitors were more satisfied overall compared to hotel, motel and B&B visitors.
  - 65% of nonlocal day visitors were very satisfied with the cleanliness of the trail corridor, significantly more than local day visitors.
  - 57% of nonlocal day visitors were very satisfied with trail safety, significantly more than local day visitors.
  - 44% of nonlocal day visitors were very satisfied with the condition of the trail surface, significantly more than local day visitors and motel, hotel and B&B visitors.



- 41% of nonlocal day visitors were very satisfied with restroom cleanliness, significantly more than local day visitors.
- 36% of nonlocal day visitors were very satisfied with restaurant/dining opportunities, significantly more than campground visitors.
- Nonlocal day visitors were the youngest segment at an average age of 50 years old.
- On average, nonlocal day visitor parties spent:
  - About \$21.30 on restaurants and bars, significantly more than local day visitors.
  - About \$3.36 on groceries and take-out food.
  - About \$5.83 on snacks, water and beverages, significantly more than local day visitors.
  - About \$17.20 on auto gas and oil, significantly more than local day visitors.
  - About \$4.50 on other transportation expenses.
  - About \$0.24 on admissions (entertainment, recreations and museums).
  - About \$2.82 on shopping (clothes, souvenirs, etc.).
  - About \$0.28 on equipment rental.
- Nonlocal day visitors spent about \$161.73 per party per trip (MGM2), significantly more than local day visitors.
- Nonlocal day visitor parties spent about \$30.05 per person per trip.
- On average, nonlocal day visitor spending covered 1.98 people in total, significantly more than local day visitors.
  - Nonlocal day visitor parties averaged people total 1.88 adults, significantly more than local day visitors.
  - Nonlocal day visitor parties averaged 0.10 children.
- In the past year, nonlocal day visitors spent the following on Katy Trail-related expenses:
  - About \$221 on bicycles.
  - About \$59 on bicycle supplies.
  - About \$38 on clothing.
  - About \$19 on shoes.
  - About \$18 on other trail-related expenses.

## Overnight Visitors

### *Hotel, Motel and B&B Visitors*

- 53% of hotel, motel and B&B visitors were first-time visitors, significantly more than day visitors.
- 22% of hotel, motel and B&B visitors were very familiar with the Katy Trail.
- Hotel, motel, and B&B visitors spent an average of 2.65 nights in and around the Katy Trail.
- 97% of hotel, motel and B&B visitors bicycled, significantly more than day users.
- 11% of hotel, motel and B&B visitors participated in walking and 2% participated in running/jogging.
- 35% of hotel, motel and B&B visitors visited a small town along the trail and 35% visited a historical attraction related to the Katy Trail, significantly more than day users.
- 41% of hotel, motel and B&B visitors visited a winery and 28% participated in shopping/antiquing, significantly more than all other visitor segments.
- 89% of hotel, motel and B&B visitors said the Katy Trail was the primary reason for their visit to the area.
- Hotel, motel and B&B visitor parties averaged 3.90 people overall, significantly more than day visitors.
  - Hotel, motel and B&B visitor parties averaged 3.72 adults, significantly more than day visitors.
  - Hotel, motel and B&B visitor parties averaged 0.18 children.
- Hotel, motel and B&B visitors visited the Katy Trail an average of seven times in the past year.
- 13% of hotel, motel and B&B visitors participated in an organized bike tour, significantly more than nonlocal day visitors.
- Hotel, motel and B&B visitors traveled an average 273 miles to reach the Katy Trail, significantly farther than day visitors.
- 52% of hotel, motel and B&B visitors traveled one way on the trail, significantly more than day users.
- 53% of hotel, motel and B&B visitors were very satisfied with the Katy Trail.
- Hotel, motel and B&B visitors on average were 55 years old, significantly older than nonlocal day visitors (average age 50).
- On average, hotel, motel and B&B visitor parties spent:
  - About \$375.60 on lodging, significantly more than other visitor segments.
  - About \$163.40 on restaurants and bars, significantly more than other visitor segments.
  - About \$24.34 on groceries and take-out food, significantly more than day visitors.
  - About \$24.66 on snacks, water and beverages, significantly more than other visitor segments.
  - About \$47.47 on auto gas and oil, significantly more than other visitor segments.
  - About \$11.86 on other transportation expenses, significantly more than local day visitors.
  - About \$2.66 on admissions (entertainment, recreations and museums), significantly more than day users.

- About \$21.03 on shopping (clothes, souvenirs, etc.), significantly more than other visitor segments.
  - About \$29.75 on equipment rental, significantly more than day visitors.
- Hotel, motel and B&B visitors spent about \$700 per party per trip, significantly more than other visitor segments.
- Hotel, motel and B&B visitors spent about \$297 per person per trip, significantly more than other visitor segments.
- Hotel, motel and B&B visitors spent about \$399.85 per night (MGM2), significantly more than other visitor segments.
- Hotel, motel and B&B visitors spent about \$122.60 per person per night, significantly more than other visitor segments.
- On average, hotel, motel and B&B visitor spending covered 2.54 people in total, significantly more than day visitors.
  - Hotel, motel and B&B visitor parties averaged 2.37 adults, significantly more than other visitor segments.
  - Hotel, motel and B&B visitor parties averaged 0.17 children.
- In the past year, hotel, motel and B&B visitors spent the following on Katy Trail-related expenses:
  - About \$290 on bicycles.
  - About \$94 on bicycle supplies, significantly more than nonlocal day visitors.
  - About \$61 on clothing, significantly more than local day visitors.
  - About \$21 on shoes.
  - About \$36 on other trail-related expenses.

### ***Campground Visitors***

- 41% of campground visitors were first-time visitors, significantly more than day visitors.
- 20% of campground visitors were very familiar with the Katy Trail.
- Campground visitors spent an average of 2.55 nights in and around the Katy Trail.
- 99% of campground visitors bicycled, significantly more than day users.
- 7% of campground visitors participated in walking and 3% participated in running/jogging.
- 34% of campground visitors visited a small town along the Katy Trail, 29% visited a historical attraction related to the Katy Trail and 16% of campground visitors went shopping/antiquing, significantly more than day users.
- 15% of campground visitors visited a local winery, significantly more than local day visitors.
- 95% of campground visitors said the Katy Trail was the primary reason for their visit to the area, significantly more than day visitors.
- Campground visitor parties averaged 7.85 people overall, significantly more than other visitor segments. The survey included camping groups of up to 15 people; typically there were more children in youth camping groups than in family groups.
  - Campground visitor parties averaged 5.17 adults, significantly more than other visitor segments.

- Campground visitor parties averaged 2.68 children, significantly more than other visitor segments.
- Campground visitors visited the Katy Trail an average of five times in the past year.
- 14% of campground visitors participated in an organized bike tour, significantly more than local day visitors.
- Campground visitors traveled an average 209 miles to reach the Katy Trail, significantly farther than day visitors.
- 49% of campground visitors traveled one way on the trail, significantly more than day users.
- 63% of campground visitors were very satisfied with the Katy Trail.
  - Campground visitors were significantly more satisfied with restroom cleanliness, as compared to all other visitors.
  - Campground visitors were significantly more satisfied with restroom availability in the communities, as compared to local day visitors and to hotel, motel and B&B visitors.
  - More than a third of campground visitors were very satisfied with campgrounds (34%), significantly more than day visitors.
  - 53% of campground visitors were very satisfied with other overnight lodging (hotels/motels/B&B inns), significantly more than local day visitors.
  - 43% of campground visitors were very satisfied with shuttling services, significantly more than day visitors.
- Campground visitors were on average 52 years old.
- On average, campground visitor parties spent:
  - About \$70.89 on lodging.
  - About \$83.14 on restaurants and bars, significantly more than day visitors.
  - About \$19.29 on groceries and take-out food, significantly more than day visitors.
  - About \$12.40 on snacks, water and beverages, significantly more than day visitors.
  - About \$26.74 on auto gas and oil, significantly more than local day visitors.
  - About \$10.93 on other transportation expenses, significantly more than local day users.
  - About \$1.06 on admissions (entertainment, recreations and museums), significantly more than local day users.
  - About \$4.77 on shopping (clothes, souvenirs, etc.).
  - About \$1.43 on equipment rental, significantly more than local day visitors.
- Campground visitors spent about \$230 per party per trip, significantly more than day visitors.
- Campground visitors spent about \$140 per person per trip, significantly more than day visitors.
- Campground visitors spent about \$189.54 per night (MGM2).
- Campground visitors spent about \$43.18 per person per night, significantly more than local day visitors.
- On average, campground visitor spending covered 2.15 people in total, significantly more than local day visitors.
  - Campground visitor parties averaged 1.69 adults.
  - Campground visitor parties averaged 0.46 children, significantly more than day visitors.
- In the past year, campground visitors spent the following on Katy Trail-related expenses:

- About \$181 on bicycles.
- About \$77 on bicycle supplies.
- About \$30 on clothing.
- About \$36 on shoes.
- About \$51 on other trail-related expenses.

*Other Overnight Visitors, e.g. passing through area, Visiting Friends and Relatives (VFR)*

- Due to inadequate sample size, visitors passing through the area or visiting friends or relatives were excluded from the analysis.

## MGM2 Visitor Segmentation Routine<sup>5</sup>

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MGM2 is an update of the National Park Service's (NPS) Money Generation Model (MGM), originally developed by Dr. Ken Hornback to estimate the impacts of National Park Service visitor spending on the local economy. Economic impacts are summarized in terms of sales, income, employment, and value added to the community.

The basic components and calculations of economic impact analysis are summarized in the following equation:

$$\text{Economic impacts} = \text{Number of visitors} * \text{Average spending per visitor} * \text{Economic multiplier}$$

The three primary data inputs to MGM2 are Visits, Average Visitor Spending and Multipliers. In this study, visits were derived from an estimate of Katy Trail park users, based on an automatic visitor counting system calibrated through on-site physical counts. Spending was determined through a 2011 survey of Katy Trail visitors. MGM2 provides several sets of multipliers to capture the economy in the region around the park; because the area surrounding the Katy Trail is primarily rural, this study used a rural multiplier.

### Economic Impact Concepts

MGM2 estimates both direct effects and secondary effects of visitor spending. *Direct effects* accrue largely to tourism-related businesses in the area. *Indirect effects* accrue to a broader set of economic sectors that serve these tourism firms. *Induced effects* are distributed widely across a variety of economic sectors. *Multipliers* capture many "rounds" of re-spending of the initial infusion of visitor spending within the region.

**Direct effects** are the changes in sales, income and jobs in those businesses or agencies that initially receive the visitor spending (motels, campgrounds, restaurants, grocery stores, attractions, retail stores, etc.). Direct effects are estimated by applying simple ratios (jobs to sales, income to sales, etc.) to the direct sales.

**Secondary or "multiplier" effects** capture indirect and induced effects. These are the changes in economic activity within the region that result from recirculation of the money spent by visitors within the local economy. Secondary effects are indirect and induced:

- **Indirect effects** are the changes in sales, income and jobs in "backward linked" industries, the businesses that supply goods and services to those that sell directly to the visitor. For example, motels purchase linen supplies, utilities and other goods and services in the local area to provide visitor lodging.
- **Induced effects** are the changes in economic activity in the region resulting from household spending of income earned through a direct or indirect effect of the visitor spending. For example, motel and linen supply employees live in the region and spend their income on housing, groceries, education, clothing and other goods and services.

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<sup>5</sup>Daniel J. Stynes, Dennis B. Propst, Wen-Huei Chang, and YaYen Sun. Estimating National Park Visitor Spending and Economic Impacts; The MGM2 Model. May, 2000.

**Total effects** are the sum of direct, indirect and induced effects. Total effects are estimated by applying regional economic multipliers to the estimates of direct sales.

### Definitions

- **Sales** are the sales by firms within the region to park visitors. As explained below, not all visitor spending accrues to the region as direct sales.
- **Jobs** are the number of jobs in the region supported by the visitor spending. Job estimates are not full-time equivalents; they include part-time and seasonal positions.
- **Personal income** includes wage and salary income, proprietor's income and employee benefits.
- **Value added** is a commonly used measure of the contribution of an industry or region to the local economy. Value added includes personal income plus business income, rents and profits, and indirect business taxes. As the name implies, it is the "value added" by the region to the final good or service being produced, and can be defined as the final price of the goods or services minus the costs of all non-labor inputs to production.
- **Visits**
- Instead of using just overall counts of visitors, MGM2 divides visitors into distinct segments with different spending patterns and possibly different responses to management and marketing decisions. Segments are based on lodging types, which are the best general predictors of spending and use patterns.
  - **Local** - local visitors, who live in the designated region
  - **Nonlocal Day** - non-local day visitors (not staying overnight in the local area)
  - **MOTEL-OUT** - visitors in hotels, motels, B&B inns, cabins, etc., outside the park
  - **CAMP-OUT** - campers staying outside the park
  - **VFR** - visitors staying overnight in the area with friends, relatives or other private homes.
- **Spending**
- The MGM2 model covers all visitor spending in the local area. Complete spending profiles are used instead of just spending on lodging and meals, as was the case with MGM. Spending is itemized in 12 categories. A different spending profile is assumed for day visitors to the area compared to visitors staying overnight in motels, campgrounds, or with friends and relatives.
- **Multipliers**
- Multipliers convert spending to corresponding jobs and income in the area, and estimate the secondary or multiplier effects of visitor spending. MGM2 multipliers are disaggregated into sector-specific multipliers that capture multiplier effects of spending in different sectors of the economy. For example, a dollar spent in the lodging sector will have a different impact than a dollar spent in retail trade or amusements.

For the Katy Trail Economic Impact Study, user profile data were entered into the National Park Service Visitor routine to determine the number of party-nights attributed to Katy Trail State Park. All motel and campground visitors are considered out-visitors since there is no overnight lodging inside Katy Trail State Park.

Visitor party-nights are based on the percentage of each visitor segment, the size of the party, and the average number of nights in the area for each segment. Party-nights attributed to the park are based on the percentage of visitors who said the Katy Trail was the reason for their visit.

### Breakdown of Users by Segment

| Segment                        | Percent of recreation visits |
|--------------------------------|------------------------------|
| Local day trip                 | 31%                          |
| NL Day Trip                    | 44%                          |
| Motel-out                      | 15%                          |
| Camp-Out                       | 10%                          |
| Other                          | 2%                           |
| <b>Total Park Day Visitors</b> | <b>100.0%</b>                |

Table 4

|  | Park day users |        |           |          |       |
|--|----------------|--------|-----------|----------|-------|
|  | Local          | Day-NL | Motel-out | Camp-Out | Other |
| Party size                               | 2.0            | 2.8    | 3.9       | 7.8      | 3.2   |
| Length of stay in area (nights)          | 1.0            | 1.0    | 2.6       | 2.5      | 1.7   |
| Nights spent in the park                 | 0.0            | 0.0    | 0.0       | 0.0      | 0.0   |
| Park entries per trip                    | 1.0            | 1.0    | 2.6       | 2.5      | 1.7   |
| Percent of stay attributable to the park | 83%            | 89%    | 89%       | 95%      | 76%   |

Table 5

- Assuming 400,000 annual visitors per year there were 125,672 party-day visits in 2011.
  - 40% of party-night visits were local day trips.
  - 44% of party-night visits were nonlocal day trips.
  - 11% of party-night visits were motel/hotel/B&B visitors.
  - 4% of party-night visits were campground visitors.

| Segment        | All visitor party nights |               |                      |                     | Party nights attributed to the park |                  |
|----------------|--------------------------|---------------|----------------------|---------------------|-------------------------------------|------------------|
|                | Recreation Visits        | Pct of visits | Party Nights in Area | Pct of party nights | Party Nights in Area                | %of party nights |
| Local day trip | 122,000                  | 31%           | 61,000               | 42%                 | 50,630                              | 40%              |
| NL Day Trip    | 174,000                  | 44%           | 62,143               | 43%                 | 55,307                              | 44%              |
| Motel-IN       | -                        | 0%            | -                    | 0%                  | -                                   | 0%               |
| Camp-IN        | -                        | 0%            | -                    | 0%                  | -                                   | 0%               |
| Backcountry    | -                        | 0%            | -                    | 0%                  | -                                   | 0%               |
| Motel-out      | 58,000                   | 15%           | 14,872               | 10%                 | 13,236                              | 11%              |
| Camp-Out       | 38,000                   | 10%           | 4,872                | 3%                  | 4,628                               | 4%               |
| <u>Other</u>   | <u>8,000</u>             | <u>2%</u>     | <u>2,456</u>         | <u>2%</u>           | <u>1,871</u>                        | <u>1%</u>        |
| <b>Total</b>   | <b>400,000</b>           | <b>100%</b>   | <b>145,342</b>       | <b>100%</b>         | <b>125,672</b>                      | <b>100%</b>      |

Table 6



## MGM2 Visitor Spending Profile

- Visitors spending data (per party-night) were entered into the MGM2 profile for analysis.
  - Spending was entered as party spending per night.
- Local day visitors spent an average of \$56.59.
- Nonlocal day visitors spent an average of \$161.73.
- Hotel, motel, and B&B visitors spent an average of \$399.85 per night.
- Campground visitors spend an average of \$183.85 per night.

| <b>Visitor Spending by Lodging Segment in Local Area</b>  |                       |                        |                       |                      |
|---|-----------------------|------------------------|-----------------------|----------------------|
| <b>CATEGORY</b>   | <b>L-Day<br/>User</b> | <b>NL-Day<br/>User</b> | <b>Motel-<br/>Out</b> | <b>Camp-<br/>Out</b> |
| Motel, hotel cabin or B&B inns                            | \$0.00                | \$0.00                 | \$129.60              | \$21.96              |
| Restaurants & bars  | \$6.66                | \$21.20                | \$68.30               | \$31.22              |
| Groceries, take-out food/drinks, snacks, water, beverages | \$3.03                | \$9.19                 | \$22.37               | \$12.97              |
| Gas & oil   | \$4.80                | \$17.20                | \$27.87               | \$12.45              |
| Other vehicle expenses                                    | \$1.01                | \$4.50                 | \$3.03                | \$2.66               |
| Admissions & fees   | \$0.13                | \$0.24                 | \$3.10                | \$0.69               |
| Clothing  | \$1.91                | \$2.82                 | \$8.08                | \$0.89               |
| Sporting goods  | \$39.05               | \$106.58               | \$137.50              | \$101.01             |
| <b>Total</b>  | <b>\$56.59</b>        | <b>\$161.73</b>        | <b>\$399.85</b>       | <b>\$183.85</b>      |

Table 7

## Total Visitor Spending

According to the MGM2 Model and based on 400,000 annual visitors to the Katy Trail, there were 125,672 party visits to the Katy Trail. Average Katy Trail visitor spending per party per night was \$147.14.

| Spending data set       | Units            | KTSP             |
|-------------------------|------------------|------------------|
| Year of spending data   |                  | 2011             |
| Multipliers             |                  | Rural            |
| <b>Visits</b>           | <b>Party-Day</b> | <b>125,672</b>   |
| <b>Average spending</b> | <b>Party-Day</b> | <b>\$ 147.14</b> |

Table 8

Visitors to the Katy Trail spent, on average, \$45 per person per day/night of their trip. They also spent, on average, \$56.82 per person per day/night of their trip on Katy Trail-related expenses such as bicycles clothing and other trail-related expenses during the past year.

Katy Trail visitors spent a total of **\$10,432,000** in direct spending in and around the Katy Trail in 2011.

- \$4.353 million (42%) retail trade
- \$2.648 million (25%) restaurants and bars
- \$1.950 million (19%) overnight visitor lodging
- \$358,000 (3.4%) other vehicle expenses
- \$715,000 (6.9%) wholesale trade
- \$202,000 (1.9%) sporting goods
- \$86,000 (0.8%) gas & oil
- \$67,000 (0.6%) admissions and fees
- \$47,000 (0.5%) groceries, take-out food/drinks, snacks, water, beverages
- \$5,000 (0.05%) clothing

| <b>Economic Impacts of Visitor Spending: Direct Effects</b> |                                     |             |  |                               |
|---|-------------------------------------|-------------|--|-------------------------------|
| <b>Sector/Spending category</b>                             | <b>Direct Effects</b>               |             |  | <b>Value Added<br/>\$000s</b> |
|   | <b>Direct<br/>Sales<br/>\$000's</b> | <b>Jobs</b> | <b>Personal<br/>Income<br/>\$000's</b> |                               |
| Motel, hotel cabin or B&B                                   | 1,950                               | 52          | 566                                    | 860                           |
| Restaurants & bars  | 2,648                               | 86          | 834                                    | 1,162                         |
| Groceries, take-out food/drinks                             | 47                                  | 0           | 7                                      | 13                            |
| Gas & oil   | 86                                  | 0           | 4                                      | 11                            |
| Other vehicle expenses                                      | 358                                 | 5           | 100                                    | 157                           |
| Admissions & fees   | 67                                  | 2           | 23                                     | 38                            |
| Clothing  | 5                                   | 0           | 1                                      | 1                             |
| Sporting goods  | 202                                 | 2           | 55                                     | 104                           |
| Retail Trade  | 4,353                               | 161         | 2,221                                  | 3,468                         |
| Wholesale Trade   | 715                                 | 9           | 287                                    | 489                           |
| <b>TOTAL</b>  | <b>10,432</b>                       | <b>317</b>  | <b>4,097</b>                           | <b>6302</b>                   |

Table 9

## Direct and Total Economic Effects

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### Direct Economic Effects

- Visitor spending in and around the Katy Trail generated an estimated **\$10,432,000 in direct sales**.
- Direct sales supported **317 jobs** in the area in and around the Katy Trail and **\$4,097,000 in salary and wages**.
- Value added to the local economy for direct visitor spending was **\$6,302,000**. Value added is the final price of the goods or services minus the costs of all non-labor inputs to production.

### Total Economic Effects

- The total effect of visitor spending in and around the Katy Trail was **\$18,491,000**.
- Total output/sales in and around the Katy Trail was **\$13,523,000**.
- Total output/sales supported **367 jobs**.
- The total payroll for supported jobs was **\$5,128,000**.
- Total value added to the local economy from visitor spending in and around the Katy Trail was **\$8,204,000**.

| <b>Direct and Total Economic Impacts of Visitor Spending</b> |                       |                   |                      |
|--|-----------------------|-------------------|----------------------|
| <b>Economic measure</b>                                      | <b>DIRECT EFFECTS</b> | <b>Multiplier</b> | <b>TOTAL EFFECTS</b> |
| Output/Sales (\$ 000's)                                      | \$ 10,432             | 1.30              | \$ 13,523            |
| Personal Income (\$ 000's)                                   | \$ 4,097              | 1.25              | \$ 5,128             |
| Value Added (\$ 000's)                                       | \$ 6,302              | 1.30              | \$ 8,204             |
| Jobs   | 317                   | 1.16              | 367                  |
| Total Visitor Spending (\$ 000's)                            |                       | \$ 18,491         |                      |
| Capture rate   |                       | 56%               |                      |
| Effective spending multiplier                                |                       | 0.73              |                      |

Table 10

## Marginal Impacts

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An understanding of the marginal impact of increases in visitor spending and party-nights can assist community leaders and planners establish goals and develop marketing and outreach plans.

- A change of \$1000 of visitor spending:
  - Increases direct personal income in the region by \$222.
  - Increases direct value added to the community by \$341.
  - Increases direct jobs by 0.017.
  - Increases total personal income by \$277.
  - Increases total value added to the community by \$444.
  - Increases total jobs by 0.020.
- A change in 1,000 party-nights:
  - Increases direct personal income in the region by \$32,597.
  - Increases direct value added to the community by \$50,148.

- Increases direct jobs by 2.523.
- Increases total personal income by \$40,804.
- Increases total value added to the community by \$65,279.
- Increases total jobs by 2.919.

| <b>Marginal impacts per dollar of spending and per 1,000 party-nights</b> |   |  |
|---|---|--|
|   | <b>change per \$1,000<br/>of visitor spending</b> | <b>change per 1,000<br/>party-nights</b> |
| Direct personal income  | \$ 222  | \$ 32,597                                |
| Direct value added  | \$ 341  | \$ 50,148                                |
| Direct jobs   | 0.017   | 2.523                                    |
| Total personal income   | \$ 277  | \$ 40,804                                |
| Total value added   | \$ 444  | \$ 65,279                                |
| Total jobs  | 0.020   | 2.919                                    |

Table 11

## Recommendations and Conclusions

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- Synergy/PRI/Pona recommends the following:
  - **Attract new overnight visitors** to the Katy Trail.
    - New visitors and overnight visitors spend more than returning visitors.
  - **Promote restaurants and bars, and overnight lodging** near the Katy Trail.
    - More than 50% of spending is attributed to those two spending categories.
  - **Improve the condition of the trail surface.**
    - When it comes to improving visitors' overall satisfaction, access to drinking water at trailheads and restroom cleanliness are both in need of improvement but they rate lower in relative importance as compared to the condition of the trail surface.
  - **Improve the availability of food/grocery stores, bicycle repair/maintenance services and drinking water** in the local communities.
    - All are in need of improvement and have high relative importance.
  - **Segment the trail for future studies.** Katy Trail State Park is a linear park spanning approximately 240 across the state of Missouri and the various trailheads generate different activities and usage percentages, depending on location and nearby attractions. We recommend staff **segment the trail into sections based on the MGM2 definitions of rural, small metro, larger metro and state level, and conduct further research to determine usage patterns for each section.**
    - For example, study overnight metro visitors such as those near the Main Street St. Charles trailhead.
    - Compare rural vs. urban differences (e.g. Mokane vs. Main Street St. Charles).
    - Compare isolated vs. integrated trailheads. For example, study the usage and impact of a trailhead and parking lot with little else nearby such as Mokane or Weldon Spring vs. a trailhead/parking lot in the middle of a city/town such as Main Street St. Charles or Boonville.
  - **Define local vs. nonlocal user.** A clear identification of local vs. nonlocal is important for determining economic impact. For this study, we identified local as residents of ZIP codes adjoining the Katy Trail and within 30 miles of the trail. All other visitors were considered nonlocal.

# Appendices

## Appendix A – Survey Instruments

### Katy Trail Users Questionnaire

#### Screener

To help us better understand and serve visitors to Katy Trail State Park, we are asking visitors to complete a short survey on behalf of Missouri State Parks. Your participation in this survey is appreciated and voluntary. All information you provide will be strictly confidential. Please select one answer for all questions except when specified otherwise.

S1. Is this your first visit to Katy Trail State Park?  
 Yes  No

S2. Using a scale from 1 to 5, where 1 is **not at all familiar** and 5 is **very familiar**, how familiar are you with Katy Trail State Park?

| Not at all Familiar |   |   |   |   | Very Familiar |
|---------------------|---|---|---|---|---------------|
| 1                   | 2 | 3 | 4 | 5 |               |

S3. Is your visit to the Katy Trail State Park part of a: (PLEASE SELECT ONE)

Day Trip

Overnight Trip → What type of lodging did you use in the local area?

Hotel, Motel, or B&B

Campground

Staying with friends or relatives in the area

Staying overnight outside the local area or just passing through

S4. How long do you plan to spend in and around the Katy Trail?

Hours if on a day trip: \_\_\_\_\_

Nights if on an overnight trip: \_\_\_\_\_

S5. Which of the following activities did you or another member of your travel party participate on this trip to Katy Trail State Park? (SELECT ALL THAT APPLY)

Bicycling

Running/jogging

Walking

Horseback riding

Visited a small town along the trail

Visited friends or relatives in the area

Went shopping/antiquing

Visited a historical attraction near the Katy Trail

Visited a local winery

Other (SPECIFY) \_\_\_\_\_

S6. Was the Katy Trail the primary reason for your trip to the area?

Yes

No

S7. How many people were in your travel party?

Adults: \_\_\_\_\_

Children (<18): \_\_\_\_\_

S8. What is the zip code of your permanent residence? Zip Code: \_\_\_\_\_

*Thank you for your time. We hope you enjoy your visit to Katy Trail State Park.*

# Katy Trail Users Questionnaire

## Mail-Back Survey

### INSTRUCTIONS

This survey asks about your recent trip to the Katy Trail State Park. Please complete this survey at your convenience after leaving the area and return it in the postage-paid envelope. Complete each question by checking the appropriate response or filling in the blank. **As a thank-you for your participation, your name will be entered into a drawing for a chance to win a Katy Trail Merchandise bundle that includes a Katy Trail t-shirt and water bottle, or the grand prize package that includes a Katy Trail bicycling jersey.**

### TRIP INFORMATION

- Q1. Was this your first visit to Katy Trail State Park?  
 Yes       No → How many visits have you made to Katy Trail State Park within the past year (including this trip)? \_\_\_\_\_
- Q2. What was the primary purpose of this trip (SELECT ONE)?  
 Specifically to visit Katy Trail State Park  
 Katy Trail State Park was a side trip or a stop on a trip to another destination
- Q3. Which of the following activities did you or another member of your travel party participate in on your last trip to Katy Trail State Park? (SELECT ALL THAT APPLY)
- |   |  |
|---|--|
| <input type="checkbox"/> Bicycling                            | <input type="checkbox"/> Visited friends of relatives in the area                  |
| <input type="checkbox"/> Running/Jogging                      | <input type="checkbox"/> Went shopping/antiquing                                   |
| <input type="checkbox"/> Walking                              | <input type="checkbox"/> Visited a historical attraction related to the Katy Trail |
| <input type="checkbox"/> Horseback riding                     | <input type="checkbox"/> Visited a local winery                                    |
| <input type="checkbox"/> Visited a small town along the trail | <input type="checkbox"/> Business or combined business/pleasure trip               |
| <input type="checkbox"/> Attended a special event or festival | <input type="checkbox"/> Other (SPECIFY)   |
- Q4. Did you go on an organized bike tour?  Yes → who sponsored the tour?(SPECIFY) \_\_\_\_\_  
 No
- Q5. How far did you travel to reach the Katy Trail State Park?  
Miles: \_\_\_\_\_
- Q6. Did you bike/walk one way or out and back on your most recent visit to Katy Trail State Park?  
 One Way       Out and back       Other (Specify):
- Q7. How many people were in your party?  
Adults: \_\_\_\_\_ Children (< 18): \_\_\_\_\_



Q9. How long did you spend in and around Katy Trail State Park?

Hours if a day trip: \_\_\_\_\_ Nights if an overnight trip: \_\_\_\_\_

Q8. Was your visit to the area part of a:

Day Trip

Overnight Trip → What type of lodging did you use in the local area?

- Hotel
- Motel
- Campground
- Bed & Breakfast
- Stayed with friends or relatives in the area
- Stayed overnight outside the local area or just passed through

**(CONTINUED ON BACK)**

Q10. For each of the following, how many miles did you travel on the Katy Trail during your last visit?

| Transportation Category                               | Number of Miles on the Katy Trail |
|---|-----------------------------------|
| Walk  | _____ Miles                       |
| Jog/Run   | _____ Miles                       |
| Walk with pet (dog)                                   | _____ Miles                       |
| Bicycle (conventional upright bike)                   | _____ Miles                       |
| Recumbent bicycle (i.e. laid back or reclining)       | _____ Miles                       |
| Horseback   | _____ Miles                       |
| Wheelchair or other Personal Assisted Mobility Device | _____ Miles                       |

Q11. On average, how often do you visit Katy Trail State Park during each of the following seasons?

| Season                               | Daily                 | 4-5x/<br>Week         | 2-3x/<br>Week         | 2-3x /<br>Month       | Monthly               | Every 2-<br>3<br>Months | Never                 |
|--------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-------------------------|-----------------------|
| Spring (March, April, May)           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/> |
| Summer (June, July, August)          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/> |
| Fall (September, October, November)  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/> |
| Winter (December, January, February) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/> |

Q12. In what activities do you participate on the Katy Trail (SELECT ALL THAT APPLY)?

- Walking/hiking
- Biking
- Jogging/running
- Cross country skiing
- Horseback riding
- Walking a pet
- Some other activity (SPECIFY) \_\_\_\_\_

Q13. Have you ever used any of the following related to trips to Katy Trail State Park?

- Shuttle
- Luggage/Bicycle transfer service
- Amtrak Train

**SPENDING**

Q14. Please report all **Katy Trail-related** expenses by your travel party **within 100 miles** of Katy Trail State Park on this trip. If you were part of a **larger** group, report your **own** expenses **or** those of your **immediate spending party**. Please report all expenses, whether by cash, credit card, or check, to the **nearest dollar** including any prepaid expenses. Exclude airfares. Enter 0 if you did not spend any money in a given category.

| SpendingCategory                                | Spending by your travel party |
|---|-------------------------------|
| Lodging (hotel/motel, B&B, campground etc.)     | \$ _____                      |
| Restaurants and bars                            | \$ _____                      |
| Groceries and take-out food                     | \$ _____                      |
| Snacks, water, and beverages                    | \$ _____                      |
| Auto gas and oil                                | \$ _____                      |
| Other Transportation expenses                   | \$ _____                      |
| Admissions (entertainment, recreation, museums) | \$ _____                      |
| Shopping (clothes, souvenirs, etc.)             | \$ _____                      |
| Equipment rental                                | \$ _____                      |

Q15. How many people do these expenses cover?

Adults: \_\_\_\_\_ Children (< 18): \_\_\_\_\_

Q16. What were your household’s total **Katy Trail-related** expenses **in the past year** for the following categories?

| SpendingCategory             | Spending by your household |
|------------------------------|----------------------------|
| Bicycles                     | \$ _____                   |
| Bicycle supplies             | \$ _____                   |
| Clothing                     | \$ _____                   |
| Shoes                        | \$ _____                   |
| Other trail-related expenses | \$ _____                   |

Q17. How many people do these expenses cover?

Adults: \_\_\_\_\_ Children (< 18): \_\_\_\_\_

**Evaluation of Katy Trail State Park Experience**

Q18. Using a scale from 1 to 5, where 1 is **not at all satisfied** and 5 is **very satisfied**, how satisfied are you overall with Katy Trail State Park?

**Not at all Satisfied**

**Very Satisfied**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

19. How would you rate your satisfaction with each of the following attributes of Katy Trail State Park?

| Attribute   | Not at all Satisfied |   |   |   |   | Very Satisfied |
|---|----------------------|---|---|---|---|----------------|
| Directional signs to trailheads                                   | 1                    | 2 | 3 | 4 | 5 |                |
| Information provided at trailheads about local community services | 1                    | 2 | 3 | 4 | 5 |                |
| Condition of trail surface  | 1                    | 2 | 3 | 4 | 5 |                |
| Trail safety  | 1                    | 2 | 3 | 4 | 5 |                |
| Cleanliness of trail corridor                                     | 1                    | 2 | 3 | 4 | 5 |                |
| Exhibits / interpretive panels                                    | 1                    | 2 | 3 | 4 | 5 |                |
| Restroom cleanliness  | 1                    | 2 | 3 | 4 | 5 |                |
| Drinking water availability at the trailheads                     | 1                    | 2 | 3 | 4 | 5 |                |
| Maintenance / upkeep of trail facilities                          | 1                    | 2 | 3 | 4 | 5 |                |

Q20. How would you rate your satisfaction with each of the following attributes of communities along the trail? (PLEASE CIRCLE "N/A" IF AN ATTRIBUTE DOES NOT APPLY)

| Attribute   | Not at all Satisfied |   |   |   |   | Very Satisfied |     |
|---|----------------------|---|---|---|---|----------------|-----|
| Restaurants/dining opportunities                                    | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Food/groceries  | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Campgrounds   | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Other overnight lodging (hotels/motels, bed & breakfast facilities) | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Shuttling services  | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Bicycle repair/maintenance services                                 | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Drinking water availability in the communities                      | 1                    | 2 | 3 | 4 | 5 |                | N/A |
| Restroom availability in the communities                            | 1                    | 2 | 3 | 4 | 5 |                | N/A |

(CONTINUED ON BACK)



Would you be willing to participate in future surveys or focus groups, and allow us to include your name and email address to a mailing list? Your personal information will not be used for any other purpose and will not be shared.

Yes

No

**Thank you for your participation, please return the completed survey in the postage paid envelope or mail it back to Pragmatic Research, Inc. at 200 South Hanley Road, suite 420. Clayton, Mo. 63105.**

## Appendix B – Open Ended Question Responses

| Q28. Compiled Comments or Suggestions by Percent of Responses   |           |         |                  |
|---|-----------|---------|------------------|
|   | Responses |         | Percent of Cases |
|   | N         | Percent |                  |
| Love the trail/Great trail experience/Great job   | 55        | 27.20%  | 34.00%           |
| Keep up with Maintenance/ Upkeep of trails/They are great about upkeep.   | 31        | 15.30%  | 19.10%           |
| Need more water (nonspecific)   | 23        | 11.40%  | 14.20%           |
| Need more signs/update current signs  | 9         | 4.50%   | 5.60%            |
| Would like to see the trail expanded  | 9         | 4.50%   | 5.60%            |
| Need more information provided to the visitors  | 8         | 4.00%   | 4.90%            |
| Make Trail Heads easier to find/ access   | 6         | 3.00%   | 3.70%            |
| They need better bug control  | 6         | 3.00%   | 3.70%            |
| Add more eatery options along the trail   | 5         | 2.50%   | 3.10%            |
| Need to maintain weeds/vegetation along the trail   | 3         | 1.50%   | 1.90%            |
| Fix the bridge at little Femme Osage Creek  | 3         | 1.50%   | 1.90%            |
| Need more restrooms (nonspecific)   | 2         | 1.00%   | 1.20%            |
| Clinton trail head needs water and restroom   | 1         | 0.50%   | 0.60%            |
| McBaine's bathrooms need better care  | 1         | 0.50%   | 0.60%            |
| Hindman Junction needs trashcans, water, there too, would be great.   | 1         | 0.50%   | 0.60%            |
| Parking lot at Weldon Springs is horrible   | 1         | 0.50%   | 0.60%            |
| From Trealar to McKittrick no cold water  | 1         | 0.50%   | 0.60%            |
| Trail from Mckittrick to Dutzow had areas of "sand" that was dangerous when speeding along.   | 1         | 0.50%   | 0.60%            |
| No water at stations Tebbetts & east to Machens   | 1         | 0.50%   | 0.60%            |
| More water, especially east of Jefferson City   | 1         | 0.50%   | 0.60%            |
| Lack of water at trail heads especially between McKittrick-Matson   | 1         | 0.50%   | 0.60%            |
| Fix the pot holes in the parking lot in Dutzow  | 1         | 0.50%   | 0.60%            |
| You need to repair the surface between St. Charles and Defiance. It needs to be cleaned and smoothed. Potholes need to be filled in and smoothed. | 1         | 0.50%   | 0.60%            |
| There are no restrooms starting at St. Charles and following the trail south to highway 364.  | 1         | 0.50%   | 0.60%            |
| The Weldon Springs trailhead parking lot needs repair to the big pothole.   | 1         | 0.50%   | 0.60%            |
| Nothing   | 13        | 6.40%   | 8.00%            |
| Other   | 16        | 7.90%   | 9.90%            |
| Total   | 202       | 100.00% | 124.70%          |

**Q28. Comments or Suggestions**

**(Positive) Good trail maintenance. (Negative) No water at stations Tebbetts & east to Machens**

**0.5 mile markers**

**1. Fix the bridge at Little Femme Osage Creek. 2. Defiance Ma needs restroom facilities. 3. Connect the trail to Washington Mo.**

**1. I support mile 46-47 in the adopt-a-trail program. Can you tell me if an invoice statement will be sent this year? 2. The maintenance crews have had lost to deal with this year. Thank you! For keeping up with this. It is appreciated!**

**1st class trail: upkeep, signage. Trailheads, etc.**

**1st time on Katy Trail, I enjoyed the rustic nature, being along the river.**

**A lot and found bin at trail heads. I see people losing keys and cell phone all the time. Fix some of the ruts and erosion on the trail.**

**A nearly daily basis, we enjoy the Katy for longer trips. We particularly enjoy stopping to eat or taste some wine, so the more restaurants + wineries along the trail the better!**

**Additional signage between trail leads indirect lily number of miles until next trailhead.**

**All Good**

**American Flora Fama Facilities. Suggestions: consistant facilities: all stops should have 1) restroom 2) water 3) map**

**Bathrooms need to be cleaned**

**Better bug control**

**Better water and more to do in the cities you stop at.**

**Bridge just past Weldon spring needs repair. Love the trail and plan overnight trips in the future.**

**Bugs-butterflies flew up a lot on the trail**

**Can you believe there was once argument against the trail?**

**Communities need to do a better job of advertising at the trailheads. We weren't going to tow the kids into town if we aren't sure there is a reason to. There were server stretches east of Portland that had a loose surface (probably recently repaired). It would be nice to have those compacted right away. Towing a trailer and a trail a bike though that is very hard. I was glad to see the prompt removal of storm debris the day after a storm, even though it was Sunday!**

**Cooper's landing is very nice. Coin operated tire inflating stations would be nice.**

**Curbside**

|  |
|--|
| <b>Direction/mileage to next location</b>  |
| <b>DNR ride twice a year</b>   |
| <b>Easy access and destination along trail</b>   |
| <b>Emergency service information along trail would be a comfort (medical, bike repair support, etc.) numbers along trail, contracted services for bike repair?</b>   |
| <b>Enjoyed exercise, landscaping</b>   |
| <b>Enjoyed Missouri River- Trail Grade- Level. More interpretive scenes about natural and cultural history- Better access once across bridge in Jefferson city. Make it easier to opt to Capital and Downtown, Bike lanes.</b> |
| <b>Enjoyed very much. Trail had debris and dry cracks but other than that I liked it</b>   |
| <b>Every road crossing should be labeled as to what road it is. This would be a benefit in case of emergencies. Keep the bathrooms open in the winter.</b>   |
| <b>Fix the pot holes in the parking lot in Dutzow</b>  |
| <b>Friendly people. Drinking water and more benches would be helpful</b>   |
| <b>Friendship, seeing everyone having fun</b>  |
| <b>From Trealor to McKittrick no cold water. Trail from McKittrick to Dutzow had areas of "sand" that was dangerous when speeding along. One of our riders fell. Have never seen this on the trail before.</b>                 |
| <b>Get the signage and maps updated! There are entirely inadequate with regard to water, camping, and other services-negligently so!</b>   |
| <b>Glad to have bathroom and water fountain!</b>   |
| <b>Great day trip to historic St. Charles and on the Katy trail!</b>   |
| <b>Great experience. Will be back</b>  |
| <b>Great topography and fun to try a tandem</b>  |
| <b>Great Trail</b>   |
| <b>Great trip – looking forward to more trips. Greatly disappointed/ challenge was too few camping spots along the trail. Very limiting.</b>   |



|  |
|--|
| Having a day off of work, taking friend biking, hiking the river, wild life, cliffs, etc.  |
| Hindman Junction needs trashcans, water, there too, would be great. I knew there is water at McBaine, but some people coming from Columbia, don't want to go to McBaine, when they're going to Rocheport.  |
| I always meet friendly folks   |
| I enjoy the long distance the trail covers. I can always ride further if I want to. I plan to ride from end to end sometimes and I hope there are camping facility along the way   |
| I enjoy walking/biking in Boonville & Rocheport on the pretty trail.   |
| I enjoyed having a bike trail to ride on without worrying about car/truck traffic. I enjoyed a level well-maintained trail. I would like to add more benches along the trail even in the more remote area.   |
| I enjoyed the beautiful scenery and the charming towns along the way. The only problem was a lack of water at some of the trailheads, and we traveled out on a day where the trail was a bit rough. It was much better on the day we returned after a rain had hardened the surface.     |
| I like riding the trail. I enjoy the trees, sunshine. It would be cool to have more drinking water? Between the towns? But other than that no problems. Maybe rest rooms?  |
| I like the new bridge in Rockport. Expected to participate in DNR Katy trail Bike Rally 2011. Hope flooding isn't devastating to other trail   |
| I liked riding through the tunnel near Rocheport and when riding I had to get off my bike and walk around a tree that fell down in the path and a parks guy was getting ready to cut the tree down so my group can get through and they have fast service for when tress fell overnight. |
| I love that a lot of trail in St. Charles all is in the woods  |
| I love the Katy trail. Thanks!   |
| I love the Katy trail. The Weldon Springs trailhead parking lot needs repair to the big pothole. Have ridden in various area along the trail and enjoyed all of them.  |
| I love the trail for biking & eating/drinking. I can't wait to do the whole trail this summer.   |
| I love to ride my bike on the Katy trail outside of Jefferson city once to twice a week during the seasons of spring, summer, and fall. It's a wonderful experience.   |
| I loved it! What could be done by way of education?  |

|   |
|---|
| I moved to Columbia last year and was excited to be able to bike again now that I once again live by a good trail   |
| I really enjoy the trail! There is a lot of poison ivy around the trail but I know there isn't much you can do for that!  |
| I really enjoyed my trip. The people were friendly and helpful with any questions. The trail is a great asset to Missouri!  |
| I really like the Katy Trail because of all the sites (bluffs-animals-the river) and meeting lots of people   |
| I ride the Katy a lot. It is a wonderful resource and one of the main reasons for moving to Washington. It would be great if there were water sources placed at the trailhead East of Jeff city .The crews in our area have done a great job with dealing with Tree damages. This spring. Thanks  |
| I ride the Katy several times a year and have completed the trail twice in the last 2 years. I really enjoy the Katy, but I have run into water availability on trips and at multiple trailheads. Finding food has been an issue on both full trail trips also.   |
| I think it would be awesome if a storage unit would be available in Columbia- on the Katy Trail- next to a parking lot- that I could rent. It would need to be bug/snake/climate-controlled. I live in an apartment- and have limited storage. I would leave my bike there and ride more often you could sell things like bike stuff and chain all there. |
| I think there should be trash receptacles throughout the trail.   |
| I use the Katy trail quite often and love it.   |
| I was surprised by the retired couples I met.   |
| I was very impressed with the trail and the cleanliness of the trail. I will enjoy the trail several times a year now that I have been there. I will tell others about it. It was nice to ride without the traffic.   |
| I wish this trail was around when I was young. Great Trail!!  |
| It is a great trail for people to enjoy. Suggestions for improvements would be water facilities along the trail & more info panels about areas & trees passing thru.  |
| It was great to see park employees out on Saturday morning clearing down trees from the trail caused by the storm the night before. Love the MO state parks website regarding alerts and advisories about the Katy trail and other parks!   |
| It's like a mini-vacation!  |
| Just a nice ride today.   |
| Just get it in KC!  |

|  |
|--|
| <b>Keep expanding trail to KC area.</b>  |
| <b>Keep up the good work!!</b>   |
| <b>Lots of bugs-specifically butter fries flying in my face-pretty but annoying.</b>   |
| <b>Lots of mosquitos.</b>  |
| <b>Love the Katy trail. IF I could I would ride it everyday.</b>   |
| <b>Love the Katy trail. What an excellent opportunity for us. We love that it is clean. Well-kept and an easy ride. Keep up the good work and thanks for making our ride enjoyable; keeps us coming back for more</b>                        |
| <b>Lovely day, good wine</b>   |
| <b>Make drinking water available at each bathroom stop.</b>  |
| <b>Make sure you know the trail conditions before you ride onto it. Road Trans-America route 3100 with good/decent tires had two flats within 40 miles on the trail and was forced to wait all weekend until the shop opened on Tuesday.</b> |
| <b>Make trail wider west of Defiance by cutting or dragging.</b>   |
| <b>More "Buggy" due to high water??</b>  |
| <b>More options for eating/camping would be good!</b>  |
| <b>More vegetarian options at restaurants!</b>   |
| <b>More ventilation in the bathrooms. They are hot and smelly-can't breathe in there and too sweaty, can't even stand the heat in there; more shade at trailheads.</b>   |
| <b>More water available at the stops in the eastern section of the trail. Make certain those workers who drag &amp; pack the trail stop for and move turtles.</b>  |
| <b>More water, especially east of Jefferson City. The trail was very nice, especially close to Clinton and the DNR personnel were very nice &amp; helpful.</b>   |

|  |
|--|
| <b>Moving to another state. Will miss the Katy trail.</b>  |
| <b>Mt wife &amp; I love to ride our bikes on the trail. In the hot summer we miss the shade trees that have been removed for the prairie restoration.</b>  |
| <b>N/A</b>   |
| <b>Need machine that sells Gatorade/ water, snacks along the rails at stops (some place there is nothing for miles).</b>   |
| <b>Need more free maps and the trail- always seem out.</b>   |
| <b>Need more water along the trail.</b>  |
| <b>Need more water on the trail.</b>   |
| <b>Need park benches more frequently, throughout the trail.</b>  |
| <b>Need to improve bathroom facilities having sanitizer bottle at them.</b>  |
| <b>Need to pave the trail. Keep road bikers safer by allowing them to ride the trail and avoid dangerous roads. Will make trail more useable in winter when freeze/thaw limits use of trail. Will make this the world-class bike trail. It has the potential to be--&gt; Raise tourism dollars to MO. Pave parking areas. Paving would lower erosion of trail &amp; uneven surface</b> |
| <b>Need water available on the trail. Also, have information on trail, shops and Dining in upcoming towns.</b>   |
| <b>Needs more places to stop between main access points.</b>   |
| <b>Nicely maintained trail through trail area so wonderful.</b>  |
| <b>No car traffic. Katy should connect to St. Louis city and Kansas City.</b>  |
| <b>No traffic.</b>   |
| <b>none</b>  |

One of the restrooms was filthy. Each restroom needs running water.

Only complain +Lack of water at trail heads especially between McKittrick- Matson camped at private campground close to Bluffton, kept awake all night by drunken party group. Will only complain state poorly campground.

Overall, I'm quite satisfied w/the Katy trail. The town of Treloar is the most bike-friendly town I've encountered. One thing I'd like to change: Year-round access to water & restrooms would be very nice.

Parking lot at Weldon Spring is horrible.

People should keep their dogs on leash and under control.

Please finish trail in St. Charles!

Please take the gates away or decrease length across trail. We use a tandem recumbent bike and could use more space to allow travelling through gate arms at road crossing. We enjoy our trip on the trail.

Posts at crossing and entrances are too close for some types of bikes (three wheel). Posts at 364 and upper bottom road in St. Charles. Maybe two instead of three posts.

Really love the trail. Thank you for our health.

Restrooms at trailheads should be cleaner. Trail trucks should not drive on trail when trail is soft as they leave tire marks on the trail, which is rough when biking. Weeds were not kept cut along Hartsburg to Jefferson City area last year on trail. Need to fill hole by the trail. Someone will get hurt hitting the hole. Need more gravel on muddy spots around the trailhead. Need to build up trail in North Jefferson City trailhead.

Restrooms were very clean-only one nasty one messed up we suspect by someone lining nearby. Trail mashed out in several places- near gravel-hard to ride but expect it will pack down & be smooth.

Rode the entire trail 225 miles. We are very fortunate to have this in our great state of Missouri.

Rough due to rains.

Ruts at road crossings could use some work. Water isn't always the easiest thing to find on trail. Overall this is the nicest trail system I've been on. The Sparta/Elroy trail in Wisconsin got me going and living near Creve Coeur Lake makes this so nice to be close to. We bike to St. Charles at least once a week for lunch.

Some riders not obeying single file when approaching/passing in opposite direction.

Some trees overhang trail surface-Limbs should be pruned back as to clear the path from overhangs.

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| <b>Suggest available air on pumps at various location.</b>   |
| <b>Thanks to all of the park personal, what a great ride!!! I would like to see the Katy trail promoted in the Kansas city area more.</b>  |
| <b>The bathrooms at McBaine could be improved. The smell was pretty bad!! The water could be cooler at some spots along the trail.</b>   |
| <b>The beauty of the Katy trail is in its simplicity. I would like to see more communities create spur trails that connect to the KATY Trail State Park.</b>   |
| <b>The DNR staff is great. They are very friendly. Knowledgeable and passionate.</b>   |
| <b>The historical signs/panels make it a fantastic learning opportunity in addition to a fun physical activity. We love the trail!</b>   |
| <b>The Katy is just about my favorite destination. Have been across entire trail at one time or another over past year. Would really like to see more courtesy amongst riders &amp;/or Peds. Also a bit more dog control.</b>                              |
| <b>The Katy trail is a wonderful gift the community offers.</b>  |
| <b>The main thing lacking along the trail where we normally ride is access to water. This is especially important in the summer. The trail is normally kept in very good condition.</b>  |
| <b>The trail is a great place to exercise.</b>   |
| <b>The trail provides exercise, aesthetic beauty, and a peaceful feeling that helps me survive everything else..(And it's a lot safer than peddling or running down a highway).</b>  |
| <b>The trail spur to Hermann is terrific, without it we would not have made the trip.</b>  |
| <b>The trail was well kept, and clean. Unfortunately we are 2 hours away to drive there. We are patiently waiting for the extension to get underway from Clinton to Pleasant Hill. It's very sad to see little to no progress on it.</b>                   |
| <b>The trip from Clinton to Portland was very good. The only problem was a sign that was faded that directed you to make a right turn to continue on to the trail from the Sedalia Depot(going west to east). I think sign was on Emmitt St/Boonville.</b> |
| <b>The weeds on the trail sides where very tall, in year past they were maintained. But still it is a beautiful experience.</b>  |
| <b>The yellow finches and blue birds are my favorite-point of the Katy trail experience. We rounded out the color wheel with an exceptionally bright cardinal at the Augusta trailhead.</b>  |
| <b>There are no directional signs to the Black Walnut and Machens trailheads. We never did find the Machens trailhead.</b>   |

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| <b>There are no restrooms starting at St. Charles and following the trail south to highway 364.</b>  |
| <b>Thought the trail was beautiful. Being my first experience at Katy Trail. I expected a restroom, water, and perhaps a gift shop at Clinton trail ahead. Stopped at one small town looking for a restroom and water. No directions, Windsor Casey Store is the only store we found. We'll go again but we will take more supplies.</b> |
| <b>Trail erosion near Missouri river bank between Treloar and Gore. Thumbtacks fall from trailhead community boards land on concrete and bike riders' unknowingly bike over them resulting in flat tires.</b>  |
| <b>Trail heads very hard to locate.</b>  |
| <b>Trail is in bad shape in various locations with deep ruts.</b>  |
| <b>Trail over rural roads: drive ways dangerous, especially no signage at some intersections.</b>  |
| <b>Trail to N. Jefferson city lots of large rocks and thick gravel in spots on trail. Dutzow to St. Charles good riding surface. Need water available at trailheads.</b>   |
| <b>Tree over trail.</b>  |
| <b>Water fountain at trailheads would be nice. Please fix the bridge and side of Weldon Spring!</b>  |
| <b>We have been riding the Katy trail on hybrid bikes every Sunday during the summer for several years. It has been a great experience. Water along the trail would be great but the restrooms are adequate and the trail is in fairly good condition.</b>   |
| <b>We love the Katy Trail! Keep up the good work!</b>  |
| <b>We love the trail! Very disappointed in the way that Herman is (not) integrated into the trail system (how do you get there?) No signs! No water between Jefferson City and Herman! No ice cream stands! Why not?)</b>  |
| <b>We love the trail! It's a great asset to Missouri. Please keep developing facilities and maintaining and upgrading the trail. We have brought a tandem bike and hope to travel to further section of the trail.</b>   |
| <b>We love to ride the trail!</b>  |
| <b>We moved here from Southern California especially for the Katy Trail and have not been disappointed.</b>  |
| <b>We use a couple of recumbent bikes attached with a guardian kit, which necessitates using a trailer. My daughter uses a wheelchair; therefore, the handicap pad provided does not assist her ease of transferring to her bicycle nor the bathroom. But all in all we have a great time on the trail.</b>                              |

**Well maintained to walk on, fairly level and brush trimmed well.**

**Wife and I ride every weekend (either Saturday or Sunday). Like the fact that these are no vehicles allowed. Safe to ride-out in nature. Very enjoyable and good exercise!**

**Wonderful state park. Have ridden DNR Katy trail ride twice.**

**World-class trail right in our county and state- love every minute of our time on it!**

**Would be nice to have water/Gatorade at the trailheads.**

**Would love to see more campgrounds and more restaurant/water and food stops.**

**You could spray the poison ivy bordering the trail so dogs don't get in it and spread it to owners or kids don't get in it.**

**You need to repair the surface between St. Charles and Defiance. It needs to be cleaned and smoothed. Potholes need to be filled in and smoothed.**