2025

Economic Impact of Visitors to New York

Central New York Focus

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY



Published August 2026

CONTENTS

Introduction

Methodology

Key Findings

Results in Context

Visitor Volume and Spending

Economic Impact Methodology

Economic Impact

Regional Summary

Regional Detail

Appendix



Introduction

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

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

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

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

Methodology

Methodology Overview

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

The study area is defined as the state of New York.

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

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

The complete set of data inputs is provided below.

Data Sources

- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR/CoStar:** Lodging performance data, including room demand and revenue, for hotels
- **NYS Government:** Taxable sales and purchases by category
- **NYS Comptroller:** Lodging tax collections
- **BEA/BLS**: Employment and wage data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory
- **Tourism Economics:** International arrivals data for visitors to New York



TOURISM ECONOMICS

KEY FINDINGS

Key Findings

Visitors Generate Significant Economic Impact

In 2025, **321.2 million visitors spent $97.6 billion** in the New York economy, increases of 1.1% and 3.9%, respectively. Visitor spending generated a total economic impact of **$152.7 billion.**

321.2M VISITORS TO NEW YORK

$97.6B VISITOR SPENDING

$152.7B TOTAL ECONOMIC IMPACT

$48.8B TOTAL PERSONAL INCOME

$11.9B STATE AND LOCAL TAXES



Results in Context

The visitor economy is an economic pillar in New York. In 2025, visitor spending supported the following:

$97.6B VISITOR SPENDING

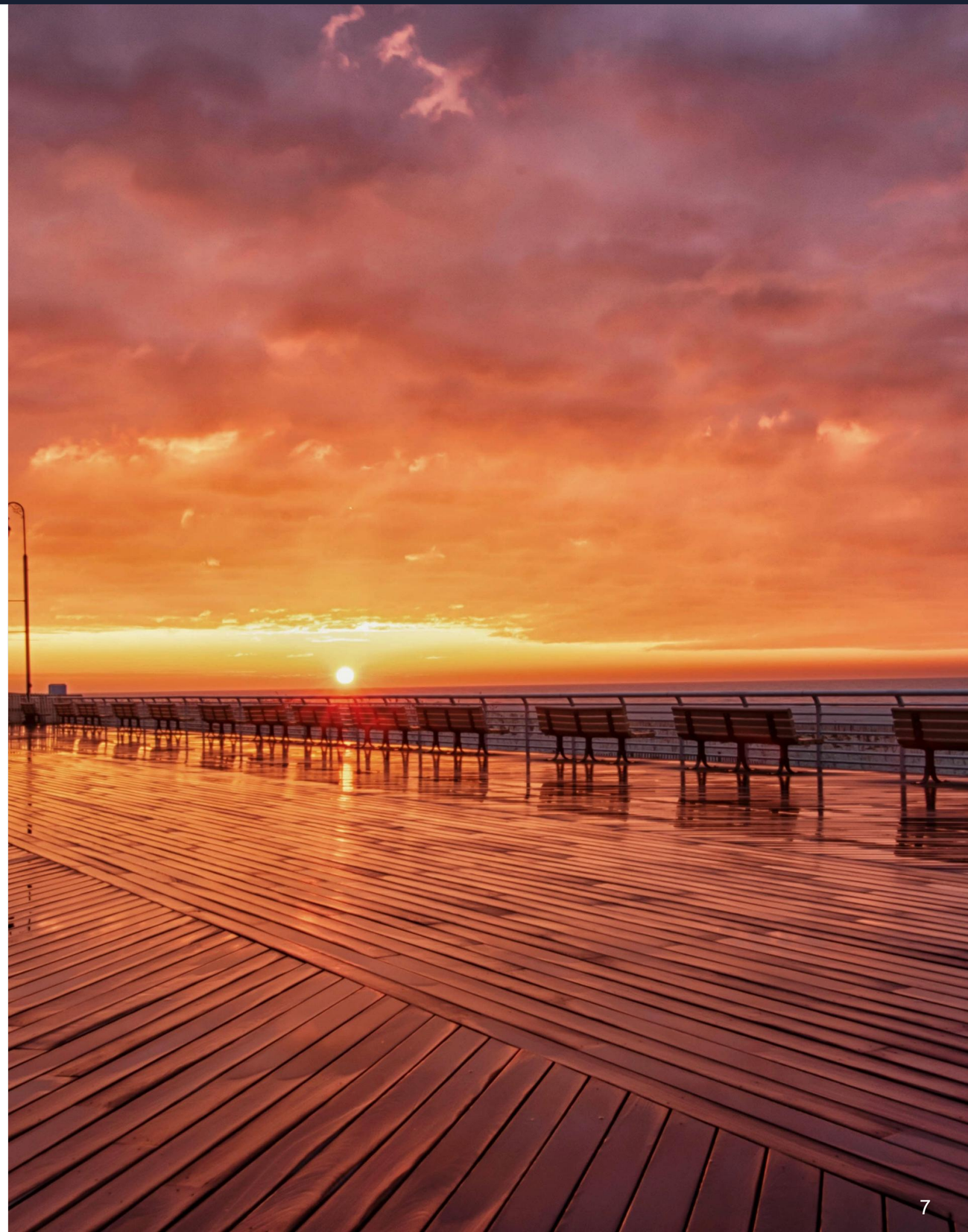
Visitors spent $267.4 million per day in New York, on average.

$48.8B PERSONAL INCOME

This is the equivalent of $6,320 per resident household, regardless of any connection to the visitor economy.

$11.9B STATE & LOCAL TAXES

Each household in New York would need to be taxed an additional $1,540 to replace the visitor-generated taxes received by New York state and local governments in 2025.



TOURISM ECONOMICS

VISITOR VOLUME & SPENDING

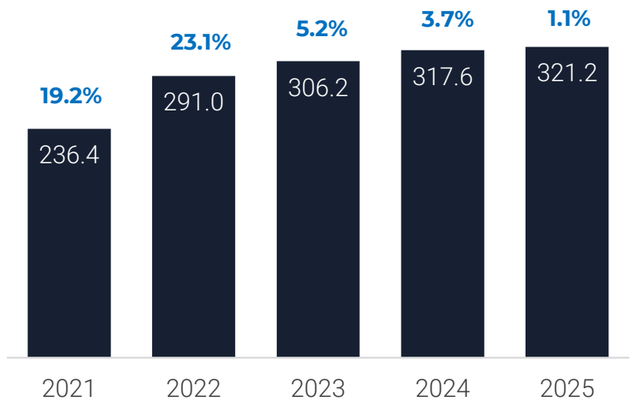


New York welcomed **321.2 million** visitors who spent **$97.6 billion** in 2025.

Visitor Volume

In 2025, 321.2 million visitors traveled to New York, a moderate increase over the prior year (+1.1%). Growth was driven solely by the domestic market, as international arrivals fell 6.3%, a result of a sharp decline in Canadian visitors.

New York Visitor Volume
millions



Source: Tourism Economics

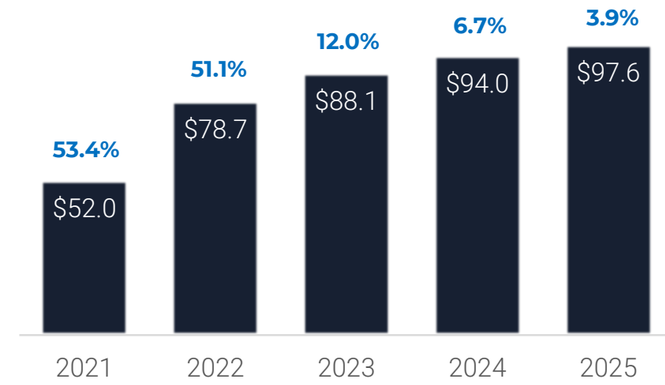
Visitor Spending

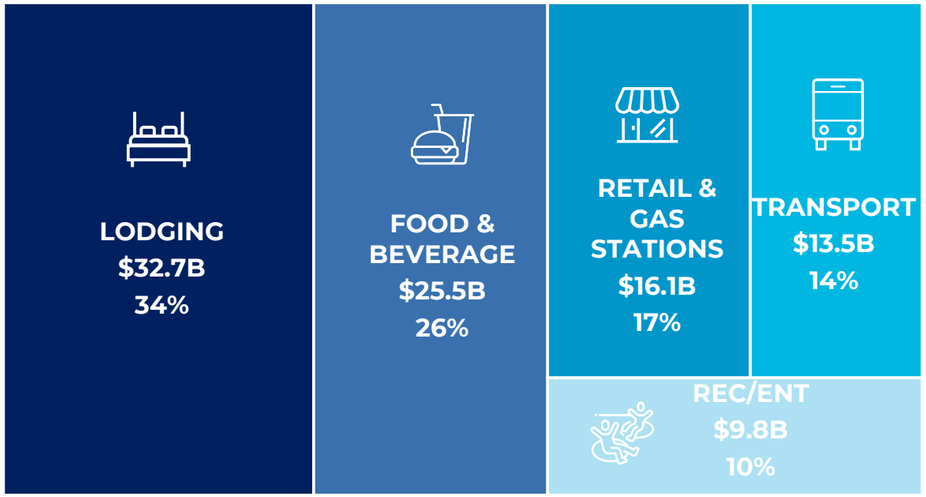
Visitor spending increased 3.9% to $97.6 billion in 2025.

Of the $97.6 billion spent, lodging, including hotels, short-term rentals, and the value of second homes, accounted for $33.6 billion—just over 34% of all visitor spending.

Visitors spent 26% of their budget on food and beverage purchases.

New York Visitor Spending
$ billions





Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Visitor Volume and Spending Trends

Visitor spending increased 3.9% in 2025, driven primarily by domestic demand and the impact of higher prices.

Lodging led all spending categories in 2025 for the second consecutive year, increasing 5.7% year-over-year. Recreation & entertainment (+4.5%) and food & beverages (+4.4%) also posted solid gains, while slight declines in air transportation and gasoline spending tempered overall growth.

Spending by Canadian visitors declined 28% from the prior year, leaving it about 14% below pre-pandemic levels.

New York Visitor Spending
$ billions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	**$52.05**	**$78.65**	**$88.10**	**$93.99**	**$97.61**	**3.9%**
Lodging	$15.96	$25.35	$28.64	$31.00	$32.75	5.7%
Food & Beverages	$14.22	$20.22	$22.60	$24.38	$25.45	4.4%
Retail & Service Stations	$9.54	$14.21	$15.19	$15.87	$16.13	1.6%
Transportation	$7.19	$11.17	$12.81	$13.39	$13.51	0.9%
Recreation & Entertainment	$5.13	$7.70	$8.86	$9.35	$9.77	4.5%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

New York Visitor Spending, by Market
$ billions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	**$52.05**	**$78.65**	**$88.10**	**$93.99**	**$97.61**	**3.9%**
Domestic	$47.39	$67.13	$71.17	$74.10	$78.48	5.9%
Canada	$0.73	$1.06	$1.76	$1.71	$1.23	-28.0%
Overseas	$3.93	$10.46	$15.16	$18.18	$17.91	-1.5%

Source: Tourism Economics

*2025 international spend is considered preliminary



TOURISM ECONOMICS

ECONOMIC IMPACT METHODOLOGY

Economic Impact Methodology

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

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

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

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

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

Economic Impact Model



TOURISM ECONOMICS

ECONOMIC IMPACT

Business Sales Impacts

Visitors spent $97.6 billion in New York in 2025. These direct impacts generated an additional $55.1 billion through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached $152.7 billion in 2025, 5.1% ahead of the prior year.

$97.6B Visitor Spending *(Direct Sales)*

+

$27.4B Indirect Sales

+

$27.6B Induced Sales

=

$152.7B Total Economic Impact

Note: Sums may not total due to rounding.

Business Sales by Industry (2025)

$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$97,613**	**$27,443**	**$27,612**	**$152,668**
Lodging	$28,972	$208	$233	$29,413
Food & Beverage	$25,453	$686	$1,311	$27,449
Finance, Insurance and Real Estate	$3,777	$5,833	$4,683	$14,293
Retail Trade	$9,084	$461	$2,794	$12,339
Recreation and Entertainment	$9,772	$477	$369	$10,617
Business Services		$7,455	$2,078	$9,532
Other Transport	$5,749	$1,790	$611	$8,150
Air Transport	$7,761	$59	$74	$7,895
Gasoline Stations	$7,044	$17	$99	$7,160
Manufacturing		$2,533	$2,106	$4,639
Education and Health Care		$37	$4,328	$4,364
Government		$744	$3,506	$4,250
Wholesale Trade		$1,888	$1,771	$3,659
Communications	$2,118	$1,208	$3,325	
Construction and Utilities	$1,922	$918	$2,840	
Personal Services	$542	$1,236	$1,778	
Agriculture, Fishing, Mining	$673	$288	$962	

Source: Tourism Economics



Employment Impacts

Visitor spending supported the largest number of jobs in the food & beverage industry (244,042), followed by lodging (99,157).

Employment by Industry (2025)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Food & Beverage	224,921	6,332	12,789	244,042
Lodging	97,739	639	780	99,157
Recreation and Entertainment	80,010	4,009	2,951	86,970
Other Transport	62,207	11,817	3,615	77,640
Retail Trade	21,731	3,272	21,067	46,070
Business Services		30,009	9,660	39,669
Air Transport	36,305	154	215	36,674
Education and Health Care		254	31,654	31,908
Finance, Insurance and Real Estate	9,087	11,737	9,258	30,082
Personal Services		4,247	11,221	15,468
Gasoline Stations	12,495	139	790	13,424
Wholesale Trade		5,052	4,910	9,962
Manufacturing		4,897	3,662	8,560
Agriculture, Fishing, Mining		3,627	1,636	5,263
Communications		3,005	1,420	4,425
Construction and Utilities		2,764	615	3,379
Government		1,665	975	2,640

Source: Tourism Economics



Personal Income Impacts

Visitor activity generated $31.3 billion in direct personal income in 2025. Including indirect and induced impacts, employees received $48.8 billion in personal income. Total visitor-generated income in New York increased 5.1% in 2025.

$31.3B Direct Personal Income + **$8.7B** Indirect Personal Income + **$8.8B** Induced Personal Income = **$48.8B** Total Personal Income

Note: Sums may not total due to rounding.

Personal Income by Industry (2025)

$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	**$31,312**	**$8,741**	**$8,757**	**$48,810**
Lodging	$10,748	$47	$54	$10,849
Food & Beverage	$9,044	$219	$438	$9,701
Air Transport	$4,261	$16	$22	$4,300
Business Services		$3,129	$988	$4,116
Other Transport	$2,362	$1,005	$280	$3,648
Recreation and Entertainment	$3,034	$212	$141	$3,387
Finance, Insurance and Real Estate	$456	$1,394	$1,356	$3,206
Education and Health Care		$16	$2,403	$2,419
Retail Trade	$935	$166	$1,051	$2,152
Wholesale Trade		$620	$599	$1,219
Communications		$588	$278	$866
Manufacturing		$434	$371	$805
Construction and Utilities		$475	$199	$674
Personal Services		$165	$409	$574
Gasoline Stations	$471	$6	$29	$506
Government		$137	$77	$214
Agriculture, Fishing, Mining		$112	$63	$175

Source: Tourism Economics



Tax Impacts

Visitor activity generated $24.5 billion in government revenues in 2025.

State and local taxes alone reached $11.9 billion in 2025, with state taxes increasing 5.5% over the prior year.

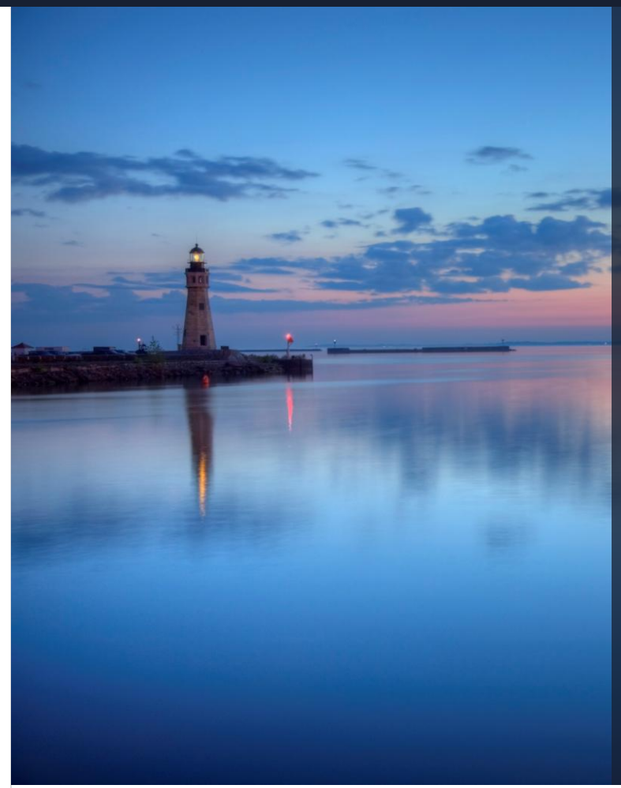
Local visitor-supported taxes, sustained mainly through property taxes, neared $6.7 billion in 2025.

Each household in New York would need to be taxed an additional $1,540 to replace the visitor-generated taxes received by state and local governments in 2025.

Tax Impacts (2025)
$ millions

	Total
Total Tax Revenues	**$24,513**
Federal Taxes	**$12,630**
Personal Income	$4,549
Corporate	$2,206
Indirect Business	$892
Social Insurance	$4,983
State and Local Taxes	**$11,882**
Sales	$3,670
Personal Income	$1,967
Corporate	$2,276
Social Insurance	$180
Excise and Fees	$460
Property	$3,329

Source: Tourism Economics



The visitor economy generated **$11.9 billion in state & local government revenue** in 2025.

Tax Impacts
$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total State & Local Tax Revenues	**$7,457**	**$9,796**	**$10,816**	**$11,407**	**$11,882**	**4.2%**
State Taxes	**$3,039**	**$4,156**	**$4,646**	**$4,929**	**$5,199**	**5.5%**
Personal Income	$1,019	$1,271	$1,414	$1,499	$1,570	4.7%
Corporate	$540	$774	$862	$916	$997	8.8%
Sales	$1,193	$1,731	$1,950	$2,072	$2,174	4.9%
Excise and Fees	$168	$233	$259	$271	$278	2.9%
State Unemployment	$119	$146	$161	$171	$180	5.1%
Local Taxes	**$4,417**	**$5,640**	**$6,170**	**$6,478**	**$6,683**	**3.2%**
Personal Income	$253	$315	$351	$372	$397	6.8%
Corporate	$736	$1,056	$1,176	$1,250	$1,279	2.3%
Sales	$818	$1,186	$1,336	$1,420	$1,496	5.4%
Property	$2,503	$2,932	$3,141	$3,263	$3,329	2.0%
Excise and Fees	$108	$150	$166	$174	$182	4.3%

Source: Tourism Economics

TOURISM ECONOMICS

REGIONAL SUMMARY



New York State is divided into **11 vacation regions**.

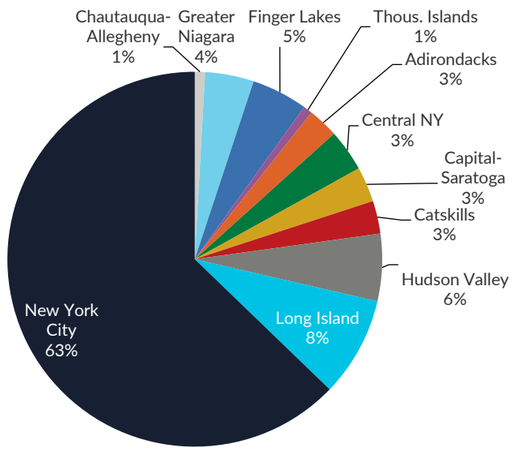
Visitor Spending By Region

In 2025, most regions displayed gains relative to the prior year; however, weaker Canadian visitation was impactful for border regions. Overall, statewide visitor spending growth moderated to 3.9%.

The New York City tourism region remains the largest by visitor spending at 63% of the state total, having witnessed modest year-over-year gains (+4.0%) in 2025.

Visitor Spending, by Region (2025)

percent of New York State visitor spend



Source: Tourism Economics

Visitor Spending, by Region

$ millions

	2021	2022	2023	2024	2025	2025 Growth
State Total	**$52,049**	**$78,654**	**$88,098**	**$93,989**	**$97,613**	**3.9%**
1. Chautauqua-Allegheny	$666	$746	$792	$829	$859	3.7%
2. Greater Niagara	$2,828	$3,449	$3,824	$4,076	$4,103	0.7%
3. Finger Lakes	$3,275	$4,091	$4,492	$4,587	$4,728	3.1%
4. Thousand Islands	$576	$693	$725	$766	$759	-1.0%
5. Adirondacks	$1,991	$2,236	$2,386	$2,493	$2,561	2.8%
6. Central New York	$2,427	$3,035	$3,266	$3,464	$3,536	2.1%
7. Capital-Saratoga	$2,013	$2,553	$2,793	$2,848	$2,955	3.8%
8. Catskills	$1,937	$2,296	$2,454	$2,628	$2,766	5.2%
9. Hudson Valley	$3,920	$4,710	$5,130	$5,450	$5,657	3.8%
10. Long Island	$5,939	$6,768	$7,612	$7,903	$8,402	6.3%
11. New York City	$26,477	$48,077	$54,625	$58,945	$61,287	4.0%

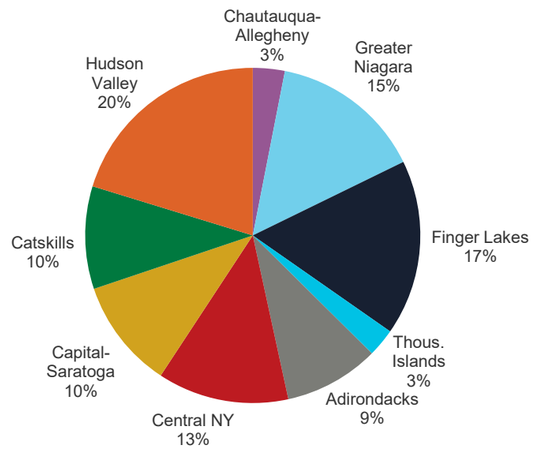
Source: Tourism Economics

Visitor spending across the upstate regions of New York, excluding New York City and Long Island, is more evenly distributed.

In Upstate New York, visitor spending was largest in the Hudson Valley (20%), followed by the Finger Lakes (17%) and Greater Niagara (15%).

Upstate Visitor Spending, by Region (2025)

percent of Upstate New York visitor spend

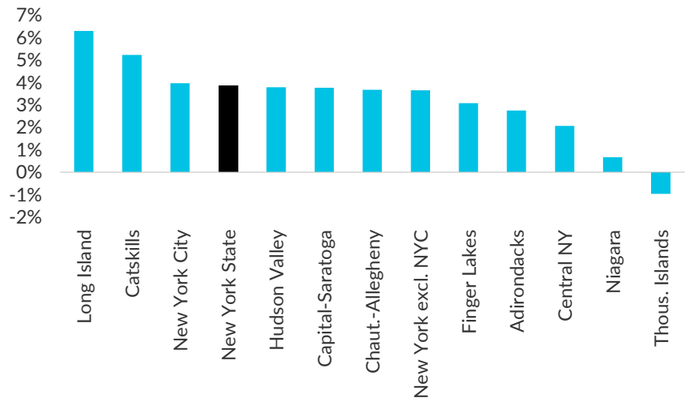


Source: Tourism Economics

Visitor Spending Growth

In 2025, all regions except for Thousand Islands recorded positive growth compared with 2024. Increases were most significant in Long Island (6.3%), followed by the Catskills (5.2%), and New York City (4.0%).

Visitor Spending Growth, by Region (2025)
% year-over-year growth



Source: Tourism Economics

Tourism Economic Impact, by Region (2025)
$ millions and jobs

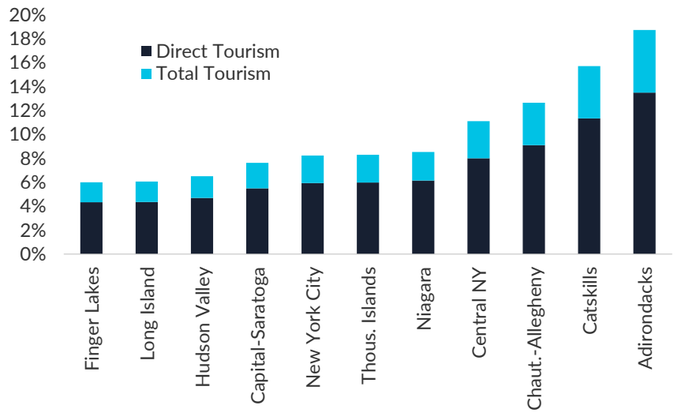
	Direct Sales	Personal Income	Employment	Local Taxes	State Taxes
State Total	**$97,613**	**$48,810**	**755,338**	**$6,683**	**$5,199**
1. Chautauqua-Allegheny	$859	$354	11,075	$58	$50
2. Greater Niagara	$4,103	$2,103	49,524	$234	$205
3. Finger Lakes	$4,728	$2,182	55,992	$309	$263
4. Thousand Islands	$759	$318	8,936	$49	$41
5. Adirondacks	$2,561	$989	20,565	$157	$142
6. Central New York	$3,536	$1,651	32,224	$171	$191
7. Capital-Saratoga	$2,955	$1,515	36,445	$187	$170
8. Catskills	$2,766	$981	18,848	$145	$149
9. Hudson Valley	$5,657	$2,804	57,989	$377	$304
10. Long Island	$8,402	$4,307	80,274	$543	$446
11. New York City	$61,287	$31,606	383,465	$4,453	$3,239

Source: Tourism Economics
Note: Incomes, jobs, and taxes include direct, indirect, and induced impacts.

Employment Intensity

Tourism is an integral part of each region's economy, generating from 6% to 19% of total employment. The tourism industry is a very significant contributor to the economy of the Adirondacks and Catskills, encompassing 19% and 16% of all jobs, respectively.

Tourism Employment Intensity, by Region (2025)
share of total industry employment



Source: Tourism Economics, BLS
Note: Employment intensity is the number of jobs supported by tourism as a share of all jobs within the county.

Tourism Economic Impact, by Region (2025)
regional shares

	Direct Sales	Personal Income	Employment	Local Taxes	State Taxes
State Total	**100%**	**100%**	**100%**	**100%**	**100%**
1. Chautauqua-Allegheny	1%	1%	1%	1%	1%
2. Greater Niagara	4%	4%	7%	3%	4%
3. Finger Lakes	5%	4%	7%	5%	5%
4. Thousand Islands	1%	1%	1%	1%	1%
5. Adirondacks	3%	2%	3%	2%	3%
6. Central New York	4%	3%	4%	3%	4%
7. Capital-Saratoga	3%	3%	5%	3%	3%
8. Catskills	3%	2%	2%	2%	3%
9. Hudson Valley	6%	6%	8%	6%	6%
10. Long Island	9%	9%	11%	8%	9%
11. New York City	63%	65%	51%	67%	62%

Source: Tourism Economics
Note: Incomes, jobs, and taxes include direct, indirect, and induced impacts.

TOURISM ECONOMICS

REGIONAL DETAIL: CENTRAL NEW YORK



Visitors to Central New York spent $3.5 billion in 2025.

Visitor Spending

Visitor spending in the Central New York region increased 2.1% relative to the previous year. Otsego County led overall growth at 9.7% compared to the prior year.

Oneida County accounts for 60% of the region's tourism sales, recording $2.1 billion in direct tourism spending.

Visitor Spending, by County (2025)

$ millions

	Lodging	Recreation	F&B	Retail & Svc Stations	Transport	Second Homes	Total
Regional Total	**$1,241.9**	**$263.4**	**$983.1**	**$675.9**	**$121.6**	**$249.9**	**$3,535.9**
Oneida	$778.8	$215.1	$533.5	$481.4	$53.6	$41.0	$2,103.5
Otsego	$177.2	$21.6	$138.9	$61.1	$5.5	$57.9	$462.1
Broome	$132.6	$9.7	$163.3	$71.5	$23.8	$11.5	$412.4
Herkimer	$52.0	$6.7	$32.3	$16.2	$7.6	$45.4	$160.1
Madison	$38.7	$4.5	$58.9	$24.9	$4.3	$24.1	$155.4
Schoharie	$38.8	$2.6	$19.4	$9.9	$0.1	$35.7	$106.5
Montgomery	$20.1	$2.1	$24.2	$7.4	$25.1	$4.3	$83.3
Chenango	$3.7	$1.1	$12.7	$3.4	$1.6	$30.0	$52.4

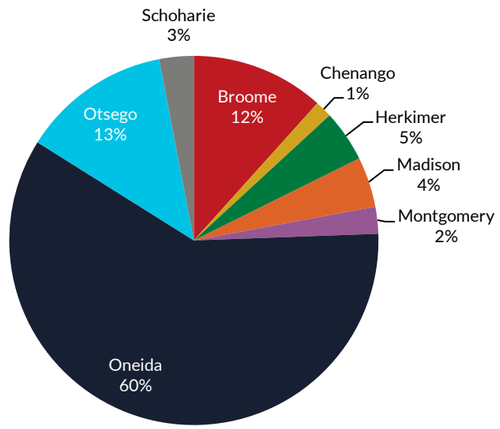
Source: Tourism Economics

County Distribution

In 2025, visitor spending and tourism-related employment grew to $3.5 billion and 32,224 jobs, respectively.

Visitor Spending, by County (2025)

percent of region visitor spend



Source: Tourism Economics

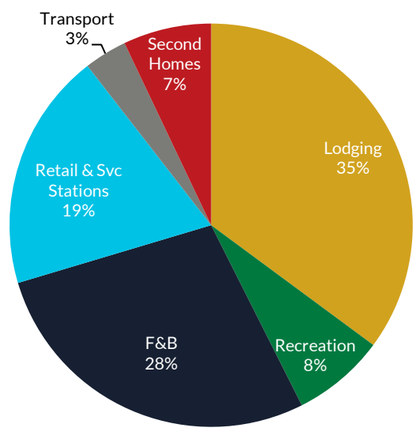
Visitors spent $3.5 billion in the Central New York region in 2025 across a wide range of sectors.

Spending on lodging and food & beverage comprised 35% and 28% of total spending, respectively.

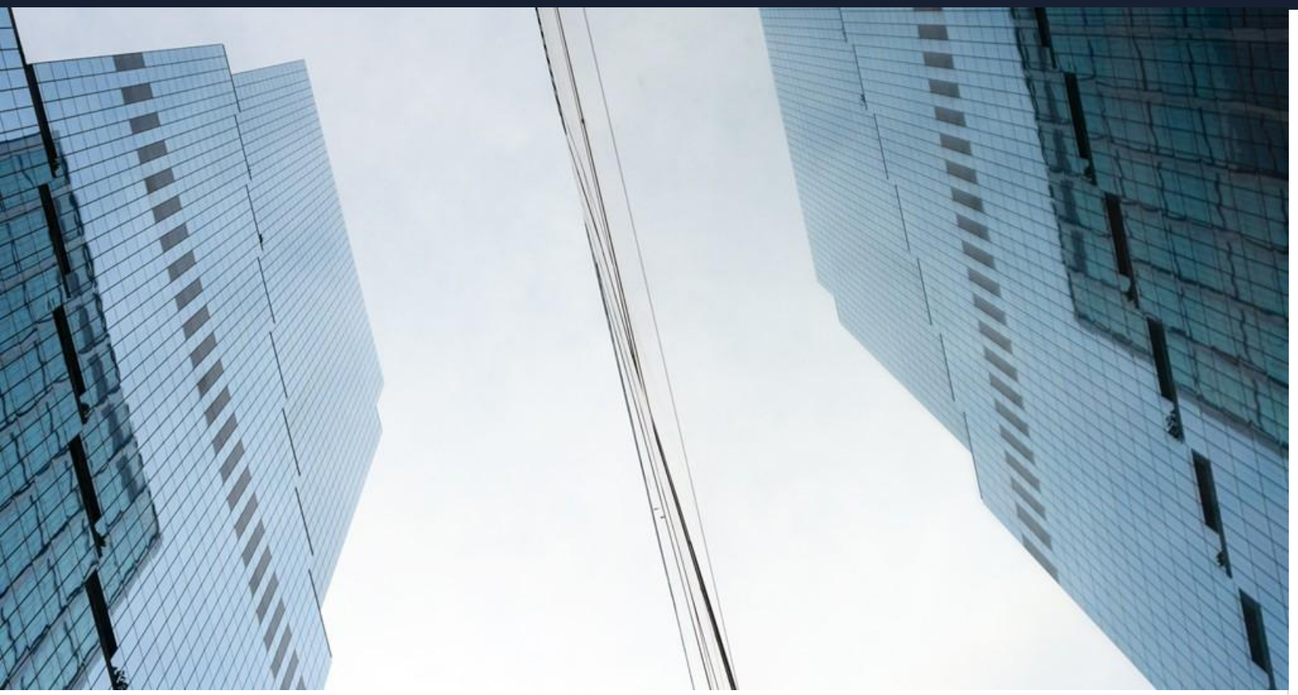
Retail & service stations also generated significant economic activity in the region, tallying $676 million (19% of total spend).

Visitor Spending, by Category (2025)

percent of region visitor spend



Source: Tourism Economics



Economic Impacts

Tourism Economic Impact, by County (2025)

$ millions and jobs

	Direct Sales	Personal Income	Employment	Local Taxes	State Taxes
Regional Total	**$3,535.9**	**$1,651.3**	**32,224**	**$170.6**	**$191.4**
Oneida	$2,103.5	$1,052.4	16,422	$88.4	$113.7
Otsego	$462.1	$154.9	3,202	$23.2	$23.5
Broome	$412.4	$203.1	5,813	$25.7	$22.9
Herkimer	$160.1	$79.2	2,019	$9.6	$9.6
Madison	$155.4	$68.4	2,208	$10.2	$8.2
Schoharie	$106.5	$42.3	1,095	$6.1	$6.4
Montgomery	$83.3	$35.7	957	$4.6	$4.5
Chenango	$52.4	$15.3	508	$2.9	$2.7

Source: Tourism Economics

Note: Incomes, jobs, and taxes include direct, indirect, and induced impacts.

Regional Growth, by County

$ millions

Visitor Spend	2021	2022	2023	2024	2025	2025 Growth
Regional Total	**$2,426.5**	**$3,034.7**	**$3,265.6**	**$3,464.3**	**$3,535.9**	**2.1%**
Oneida	$1,487.6	$1,826.1	$1,952.3	$2,076.9	$2,103.5	1.3%
Otsego	$221.3	$352.5	$388.5	$421.2	$462.1	9.7%
Broome	$295.0	$373.4	$406.7	$428.1	$412.4	-3.6%
Herkimer	$137.1	$146.4	$151.8	$155.2	$160.1	3.2%
Madison	$101.8	$125.4	$137.8	$146.4	$155.4	6.1%
Schoharie	$81.9	$95.4	$105.5	$105.7	$106.5	0.7%
Montgomery	$63.0	$75.1	$78.6	$82.4	$83.3	1.0%
Chenango	$38.7	$40.4	$44.4	$48.4	$52.4	8.3%

State Taxes	2021	2022	2023	2024	2025	2025 Growth
Regional Total	**$124.1**	**$163.2**	**$173.6**	**$183.7**	**$191.4**	**4.2%**
Oneida	$70.0	$97.9	$102.8	$109.0	$113.7	4.2%
Otsego	$12.9	$18.6	$20.5	$21.8	$23.5	7.6%
Broome	$17.2	$19.7	$21.4	$22.7	$22.9	1.1%
Herkimer	$8.0	$8.7	$9.0	$9.3	$9.6	3.3%
Madison	$5.9	$6.6	$7.3	$7.7	$8.2	6.1%
Schoharie	$4.8	$5.5	$6.1	$6.3	$6.4	2.4%
Montgomery	$3.2	$4.0	$4.1	$4.4	$4.5	3.0%
Chenango	$2.0	$2.1	$2.3	$2.5	$2.7	7.0%

Local Taxes	2021	2022	2023	2024	2025	2025 Growth
Regional Total	**$128.2**	**$153.7**	**$160.8**	**$167.3**	**$170.6**	**2.0%**
Oneida	$63.9	$80.8	$83.3	$87.2	$88.4	1.4%
Otsego	$14.5	$18.8	$20.4	$21.6	$23.2	7.5%
Broome	$21.8	$23.5	$25.1	$26.0	$25.7	-1.2%
Herkimer	$8.7	$9.3	$9.4	$9.4	$9.6	1.6%
Madison	$8.1	$8.7	$9.3	$9.7	$10.2	4.4%
Schoharie	$5.1	$5.8	$6.2	$6.1	$6.1	0.5%
Montgomery	$3.6	$4.3	$4.4	$4.5	$4.6	1.8%
Chenango	$2.4	$2.5	$2.7	$2.8	$2.9	4.1%

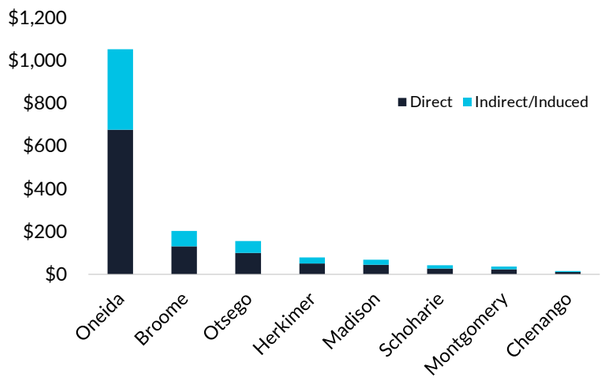
Source: Tourism Economics

Personal Income Impacts

Tourism in the Central New York region generated $1.1 billion in direct personal income and $1.7 billion including indirect and induced impacts. Total personal income, including indirect and induced impacts, was the most significant in Oneida County at $1.1 billion.

Personal Income, by County (2025)

$ millions



Source: Tourism Economics

Personal Income, by County (2025)

$ millions and share of total economy

	Direct	Total	Share (Direct)	Share (Total)
Regional Total	**$1,059.3**	**$1,651.3**	**5.9%**	**9.2%**
Oneida	$675.1	$1,052.4	10.5%	16.3%
Broome	$130.3	$203.1	2.4%	3.8%
Otsego	$99.4	$154.9	7.1%	11.1%
Herkimer	$50.8	$79.2	6.1%	9.5%
Madison	$43.9	$68.4	3.6%	5.7%
Schoharie	$27.2	$42.3	5.7%	8.8%
Montgomery	$22.9	$35.7	2.1%	3.3%
Chenango	$9.8	$15.3	0.8%	1.3%

Source: Tourism Economics, BLS

Note: The share, or income intensity, is the income supported by tourism as a share of all income generated within the county.



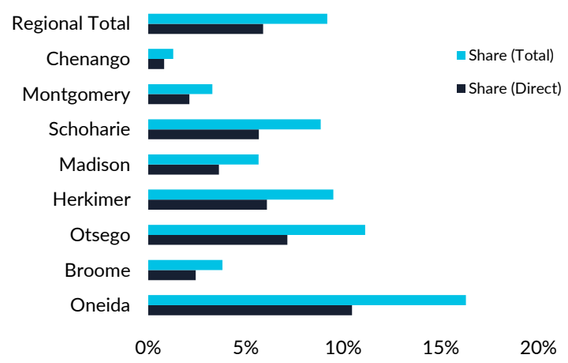
In 2025, 9.2% of all personal income in the Central New York region was generated by tourism.

Oneida County has a large and diverse economy, and the tourism industry generates a significant portion of total wages (16.3%).

Tourism in Otsego accounted for 11.1% of all personal income within the county.

Personal Income Intensity, by County (2025)

share of total economy



Source: Tourism Economics, BLS

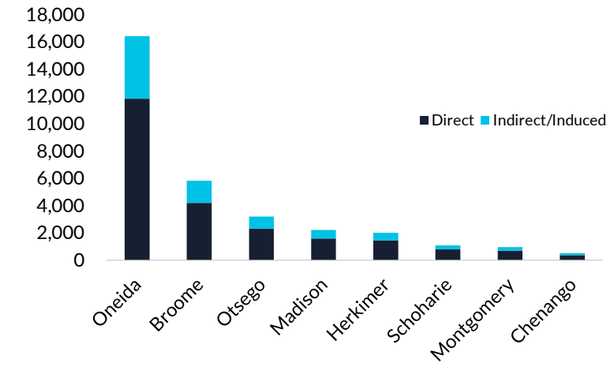
Note: Income intensity is the income supported by tourism as a share of all income generated within the county.

Employment Impacts

In 2025, total tourism-generated employment recorded 32,224 jobs, 11.1% of all jobs within the region. Direct employment in tourism accounted for 8.0% of all jobs.

Employment, by County (2025)

jobs



Source: Tourism Economics

Employment, by County (2025)

jobs and share of total economy

	Direct	Total	Share (Direct)	Share (Total)
Regional Total	**23,230**	**32,224**	**8.0%**	**11.1%**
Oneida	11,838	16,422	11.7%	16.2%
Broome	4,190	5,813	5.0%	6.9%
Otsego	2,308	3,202	10.2%	14.1%
Madison	1,592	2,208	7.7%	10.6%
Herkimer	1,456	2,019	9.2%	12.7%
Schoharie	790	1,095	9.3%	12.9%
Montgomery	690	957	3.5%	4.9%
Chenango	366	508	2.1%	2.9%

Source: Tourism Economics, BLS

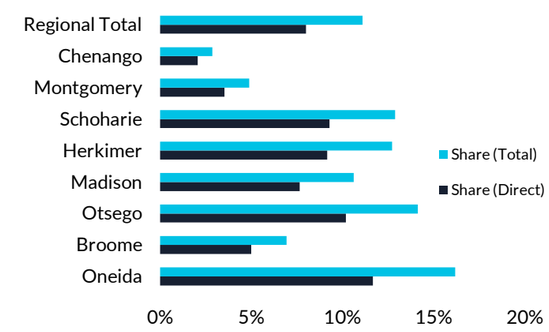
Note: The share, or employment intensity, is the number of jobs supported by tourism as a share of all jobs within the county.



Oneida County has a diverse economy and the tourism industry generates a significant portion of total employment (16.2%).

Employment Intensity, by County (2025)

share of total economy



Source: Tourism Economics, BLS

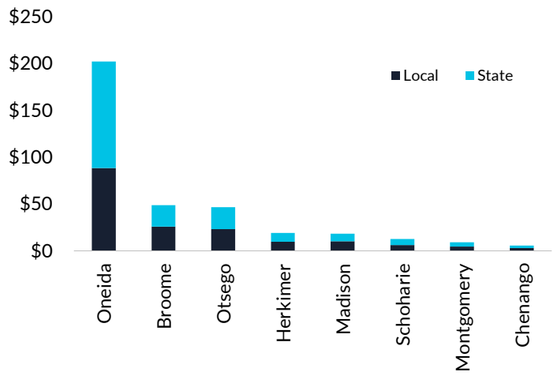
Note: Employment intensity is the number of jobs supported by tourism as a share of all jobs within the county.

Tax Impacts

Tourism in Central New York generated $362 million in state and local taxes in 2025. Sales, property, and hotel bed taxes contributed $171 million in local taxes. Oneida County constituted 56% of the region's tourism tax base.

Tax Impacts, by County (2025)

$ millions



Source: Tourism Economics

Were it not for tourism-generated state and local taxes, the average household in the region would have to pay an additional $1,188 to maintain the same level of government revenue.

Tax Impacts, by County (2025)

$ millions, share of region, and $ per household

	Local Taxes	State Taxes	Total	Regional Share	Tax Savings per Household
Regional Total	**$170.6**	**$191.4**	**$362.1**	**100.0%**	**$1,188**
Oneida	$88.4	$113.7	$202.0	55.8%	$2,122
Broome	$25.7	$22.9	$48.6	13.4%	$593
Otsego	$23.2	$23.5	$46.7	12.9%	$2,013
Madison	$10.2	$8.2	$18.3	5.1%	$698
Herkimer	$9.6	$9.6	$19.2	5.3%	$745
Schoharie	$6.1	$6.4	$12.6	3.5%	$977
Montgomery	$4.6	$4.5	$9.1	2.5%	$464
Chenango	$2.9	$2.7	$5.6	1.5%	$279

Source: Tourism Economics



TOURISM ECONOMICS

APPENDIX

Glossary

SPENDING DEFINITIONS

LODGING	*All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.*
FOOD & BEVERAGE	*Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.*
RECREATION	*Includes visitors spending within the arts, entertainment and recreation sector.*
RETAIL	*Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.*
LOCAL TRANSPORT	*Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.*
AIR TRANSPORT	*Where applicable, the local share of air transportation spending.*
SECOND HOMES	*Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.*

ECONOMIC IMPACT DEFINITIONS

DIRECT IMPACT	*Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).*
INDIRECT IMPACT	*Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).*
INDUCED IMPACT	*Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.*
EMPLOYMENT	*Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.*
PERSONAL INCOME	*Income (wages, salaries, proprietor income and benefits) supported by visitor spending.*
LOCAL TAXES	*City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.*
STATE TAXES	*State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.*



About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

Oxford Economics employs more than 600 full-time staff, including 350+ professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.

