



WORKSHOP

Greene County Tourism

Annual Report: January 1 - December
31, 2022



OUR
Approach

Tactics

- Search Engine Optimization
- Paid Media & Print Collateral
- Social Media
- Public Relations
- Email Marketing
- Influencer Marketing

Let's Go Greene

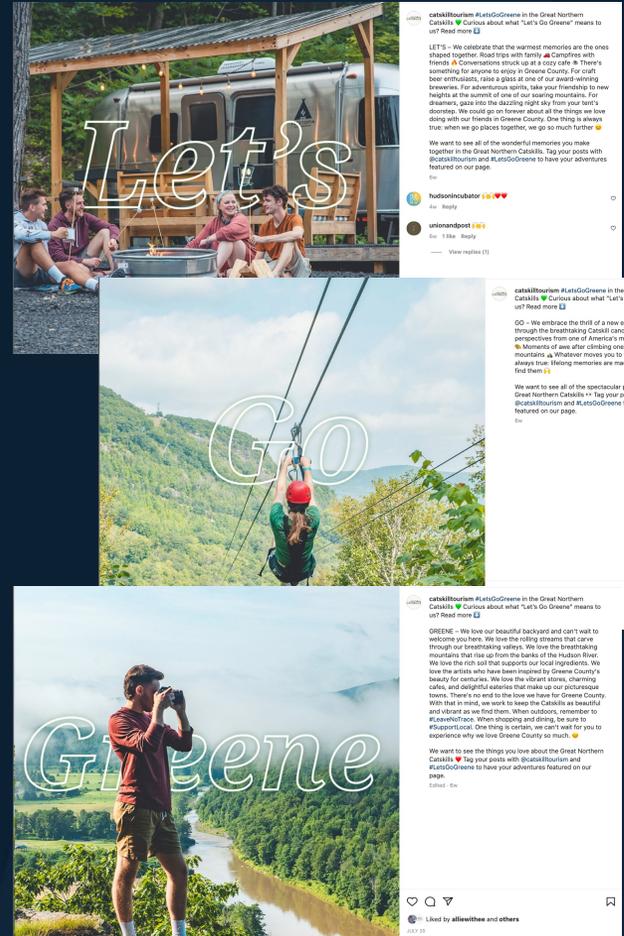
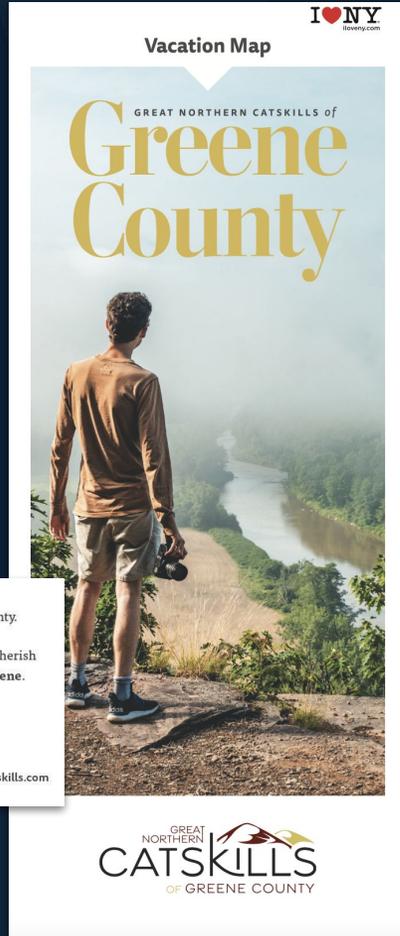
2022 Campaign

Let's Go Greene reminds visitors that some of the best memories are made together, right in the Great Northern Catskills. With so many people buzzing about the natural and cultural wonders of Greene County, it's the ideal destination for explorers of all interests to forge those memories together.

To support this newly launched campaign, Workshop implemented the #Let'sGoGreene messaging on the website, in inspiring paid media campaigns and print placements, consistent print design updates, and engaging organic social media.



Celebrate summer by staying and playing in Greene County. Reignite wanderlust and set out in search of adventure. Spend quality time together and make memories you'll cherish forever. Embrace the change in season and #LetsGoGreene.



Organic Search

In 2022, we saw strong organic search and website performance, contributing to the overall success of the Let's Go Greene campaign.

Results

- Winter, spring, and summer seasonal pages all grew in pageviews and entrances compared to last year. This shows audiences are interested in seasonal vacation planning and things to do.
- NYC, Philadelphia, Boston, and Washington DC were in the top 10 cities by website traffic indicating that we are reaching beyond local audiences.
- 12 SEO link placements directed to the Home and top category pages with broader “New York” modified tourism and outdoor activity seeking keywords to improve link authority.
- Grew from 16.1k to 22.5k keywords ranked in the top 10 pages by the end of 2022

Organic Search

During 2022, we executed ongoing optimization of tech, content & links.

- Prioritization is ongoing, and is integrated with the Content Team, Paid Media and PR planning. The goal is to have content freshly optimized prior to promotions and seasonality/interest peaks.
- Main goal was to rank for keywords related to travel intent, versus education/information keywords.

Tactics

- **TECH SEO:** ongoing work to speed up the site for indexation and mobile phone friendliness.
- **CONTENT:** optimized and published 47 pages
 - 17 new pages and 30 existing pages
- **LINKS:** worked with team to find more ways to get links from GNC networking and relationships as well as leveraging the PR links

Paid Media

- **Connected TV** garnered over 375,000 impressions with a 99% completion rate. The summer flight generated **980** website visits.
- **Digital Video Advertising** served over 751,000 impressions with 597 clicks and a **67% completion rate**.
- **Programmatic display** performed **120%** above average and **retargeting** performed **87%** above the industry benchmark. The retargeting campaign used in-banner video ads during the summer.
- **Paid Social** delivered 16.5 million impressions with 40,000 engagements and a CTR **234%** above the industry standard.

Paid Media

- **Native advertising** was incorporated for seasonal and towns campaigns with a CTR **57%** above average.
- **Paid search** served over 650,000 impressions, over 80,000 clicks. The Attractions and Outdoors campaigns have been the top performers.
- **Print ads** include placements in Hudson Valley Magazine, Hudson Valley Wine, NY Family & other placements, and RoadRUNNER.

Paid Media - Interactive Banner Ads (Display & Retargeting)

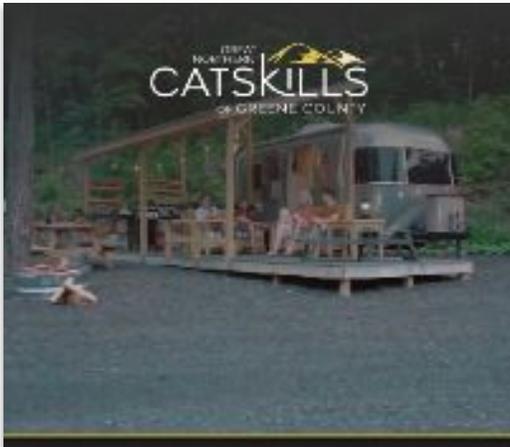


CATSKILLS
of GREENE COUNTY

**This Summer,
We're All About
Feeling Free**

#LetsGoGreene

[PLAN YOUR VISIT](#)



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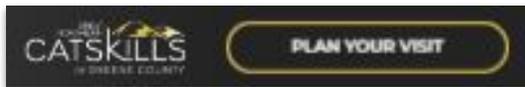


CATSKILLS
of GREENE COUNTY

**This Summer, We're
All About Feeling Free**

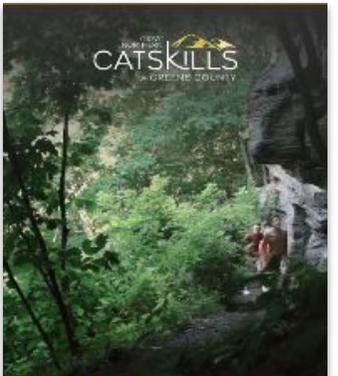
#LetsGoGreene

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CATSKILLS
of GREENE COUNTY

**This Summer, We're
All About Feeling Free**

#LetsGoGreene

[PLAN YOUR VISIT](#)

Paid Media - Paid Social & Native Advertising

Great Northern Catskills of Greene County
Sponsored · 🌐

Goodbye tents & sleeping bags, hello luxury. Indulge your appreciation for nature & the finer things with Catskills glamping.



greatnortherncatskills.com
Outdoor Stays, Your Way
Plan a Catskill Overnight

[Learn more](#)

Great Northern Catskills of Greene County
Sponsored · 🌐

Discover the highest mountains, deepest lakes, and entertainment for all ages – just a couple hours North of NYC.



greatnortherncatskills.com
NY's Mountain Escape
Road trip, anyone? 🚗

[Learn more](#)

Sponsored By Great Northern Catskills



Enjoy Winter in the Great Northern Catskills

Winter in the Catskills! Plan your trip to the Great Northern Catskills and experience the wonders of the season.

Sponsored By greatnortherncatskills.com



Hunter, NY | Adventure Lives Here

Nestled among the region's highest peaks & home to some of the top attractions in the Great Northern Catskills.

Paid Media - Print Ads

Find Your
GREAT

Sip, savor, and sigh. Discover craft beverages made for sunshine sipping and bonfire bonding. Experience Greater in the Great Northern Catskills of Greene County. #LetsGoGreene

GREAT NORTHERN CATSKILLS OF GREENE COUNTY
518-943-3223 | greatnortherncatskills.com

Find Your
GREAT

Summer is waiting in the Great Northern Catskills of Greene County. Imagine sunlit swimming spots and hiking under shade-green trees on trails that lead to 100-mile views. This is summer in America's first vacation destination, and it doesn't disappoint. From plumping destinations that don't skimp on views or creature comforts, to biking downtown and down the mountains, this season, we're all about feeling free. #LetsGoGreene

GREAT NORTHERN CATSKILLS OF GREENE COUNTY
greatnortherncatskills.com

Find Your
GREAT

Celebrate summer by staying and playing in Greene County. Reignite wanderlust and set out in search of adventure. Spend quality time together and make memories you'll cherish forever. Embrace the change in season and #LetsGoGreene.

GREAT NORTHERN CATSKILLS OF GREENE COUNTY
greatnortherncatskills.com

Fall is adventure season in the Great Northern Catskills of Greene County. From local brews to mountain views, experience the Catskills' most colorful season. #LetsGoGreene

GREAT NORTHERN CATSKILLS OF GREENE COUNTY
greatnortherncatskills.com

Photo by Andrew Pinnella

Organic Social Media

Overview

2022's social media strategy focuses on **deepening engagement** of the Great Northern Catskills with **new and existing audiences**.

Audience Results

- Combined Facebook and Instagram followings grew **11.1%**
- Reflected in user demographics, we saw a higher **concentration of audience interest in NYC and its metro areas, New Jersey, Connecticut and Pennsylvania**

Organic Social Media

Engagement

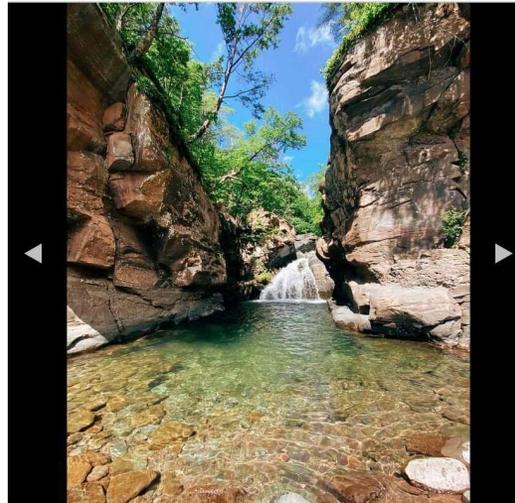
- As our audience grew, **engagement metrics** were used as a key indicator of the community building quality around GNC's social channels

Engagement Results

- In 2021, we saw declining engagement on Facebook, and have shifted content efforts for **22% higher engagement rates** on that platform
- Instagram engagement rates **increased by 5.9%**
- Across all platforms (Instagram, TikTok, and Facebook), vertical video content averaged a **5.4 percent** engagement rate, which is **50 percent higher** than the 3.6 percent average engagement rate for all content.

Organic Social Media

Facebook Top Performers



Great Northern Catskills of Greene County
Ice cold swimming holes and crystal clear pools are the perfect cure for a hot summer day!

While enjoying the natural beauty of the Catskills, remember to prioritize safety and keep the Catskills as beautiful as you found them. Tap our link to learn more about the principles of #LeaveNoTrace <https://bit.ly/3byeK8c>



Great Northern Catskills of Greene County
October 6, 2022 at 2:58 AM · 🌐

Spooky season is officially upon us 🕸️

For a night to remember, stay and play at the abandoned Catskill Game Farm. Once America's largest privately owned zoo, The Old Game Farm - The Site of the Former Catskill Game Farm hosts 200+ acres of land with many of the deserted animal shelters and pens still eerily unmoved.

📸: @bonacio_th via Instagram



Great Northern Catskills of Greene County
August 30, 2022 at 2:53 PM · 🌐

Mountain Brook Farm Adventures

Nature heals. 🌿

📸: @mountainbrookfarmadventures

Instagram Top Performers

Organic Social Media

catskilltourism
Dear mountain trails, we think about you all the ...
Liked by capitalsaratoga and 774 others
trends · Original auc · 2 people

catskilltourism
Hunter Mountain
View insights Boost post

catskilltourism
Boost post

Liked by capitalsaratoga and 1,180 others
catskilltourism Ice cold swimming holes and crystal clear are the perfect cure for a hot summer day!

catskilltourism
Curl up under a flannel blanket and celebrate Catskills flavors with @gracies_ny's cider

Organic Social Media

Great Northern Catskills on TikTok

More than a billion users around the world turn to TikTok for **95 minutes of entertainment every day**. TikTok is not just a place; it is **the place** to meet your hyper-engaged, fiercely interested, digitally native audiences.

With a new and growing presence on TikTok, The Great Northern Catskills continues to be social media forward, **meeting audiences in new and exciting ways** through TikTok's powerful algorithm.



Public Relations

Overview

39 media placements collected on behalf of Greene County in publications and media outlets, including ***Fodor's, VUE New Jersey magazine, The Travel*** and more!

Our top 6 placements have resulted in over **2,000 sessions** on www.GreatNorthernCatskills.com and focus heavily on downtowns, events, and attractions.
and focus heavily on downtowns, events, and attractions.

When opportunity knocks....

When **Spectrum News TV** contacted us about a fall foliage piece related to the Catskill region at large, we focused the reporter's attention on Greene County, arranging for **James Hannahs, Director of Economic Development**, to be interviewed for the segment on Hunter Mountain.

"18 Best Weekend Getaways from New York City"

"In addition to outdoor activities such as hiking, fly-fishing, biking and zip lining, the Catskills are a haven for artists. Follow the Hudson River School Art Trail to witness firsthand the vistas that inspired artists like Thomas Cole."



"14 Top NY Ski Resorts"

"Located in the Great Northern Catskills with a base elevation of 1,600 feet and 320 skiable acres, Hunter Mountain is known as the 'Snowmaking Capital of the World'...after hitting the slopes all day, why not stay the night? Guests can rest at one of the inns, hotels, motels or luxury slopeside lodges in the area, or at least pop in for an après-ski beverage.." (Windham Mtn. also featured in article)



"Most enchanting places for fall foliage in the USA"

"Fall foliage illuminates the Great Northern Catskills' magnificent vistas with flaming gold, tangerine, and reddish colours, making it the perfect time to visit. ."



"13 Best Road Trips From NYC"

"In the Great Northern Catskills of Greene County, paddleboard out to the historic Hudson-Athens Lighthouse or visit the mountaintop to hike the Catskill Park.."



Email Marketing

Overview

Our 2022 goals were to attract and retain new customers and foster to the lasting relationships you already have.

We want to give The Great Northern Catskills community another way to connect with us by approaching our email campaigns in a human and helpful way.

Email Marketing

Results

- Average **open rate**: 38% which is an 11.76% increase from our efforts in 2021.
- Average **click rate**: 2.59% which is well above the travel & tourism industry standard of .88%.
- We see our audience primarily opening emails from their computer over their cell phone.
 - + **95%** open on desktop
 - vs.
 - + **5%** open on mobile
- But, we see that mobile and desktop are harnessing nearly the same amount of clicks
 - + **52%** open on desktop
 - vs.
 - + **48%** open on mobile

Influencer Marketing

Reached audiences will be inspired
by the idea that anyone who comes
along on a #LetsGoGreene trip will
find something to love!

As arbiters of taste, deciders of trends, and content creators with a profound pulse on audiences, social media influencers can be powerful evangelists that bring you to new audiences. The **right influencer** telling the **right brand story** can increase visits and spread awareness of your brand.

Influencer Activation Content

Marie Zoumanigui & Christina Lau x Greene County

Results:

- + **43.7K+** Combined Impressions
- + **2.6K+** Total Engagements
- + **214** Combined Comments and Replies
- + **116** Shares and saves
- + **144** Activation Day Followers

STORY



POST



REEL



THANK YOU

2022 v 2021 Marketing Performance Report

2023 Action Plan

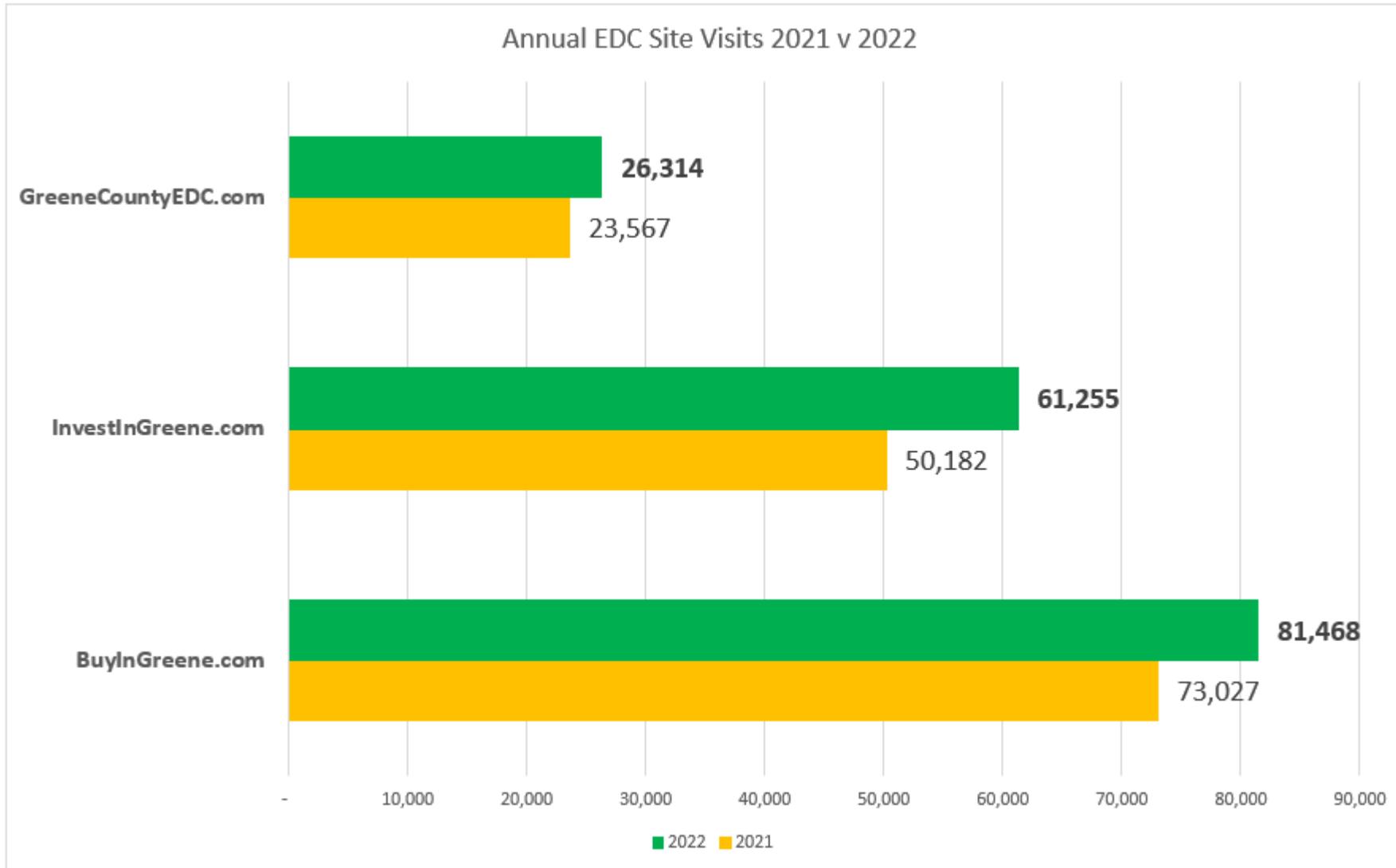


February 2, 2023

Mark A. Gustavson
Executive Vice President – Strategic Development



Website Visits (Traffic) EDC Sites



2022 – 171,059 Total Visits

15%

2021 – 148,797 Total Visits

What this means...

Site visit increases in 2022 come from three major areas: Revitalization & Resource Library for EDC; Success stories for Invest, and; Virtual Main Streets for BIG.

How we can capitalize on it...

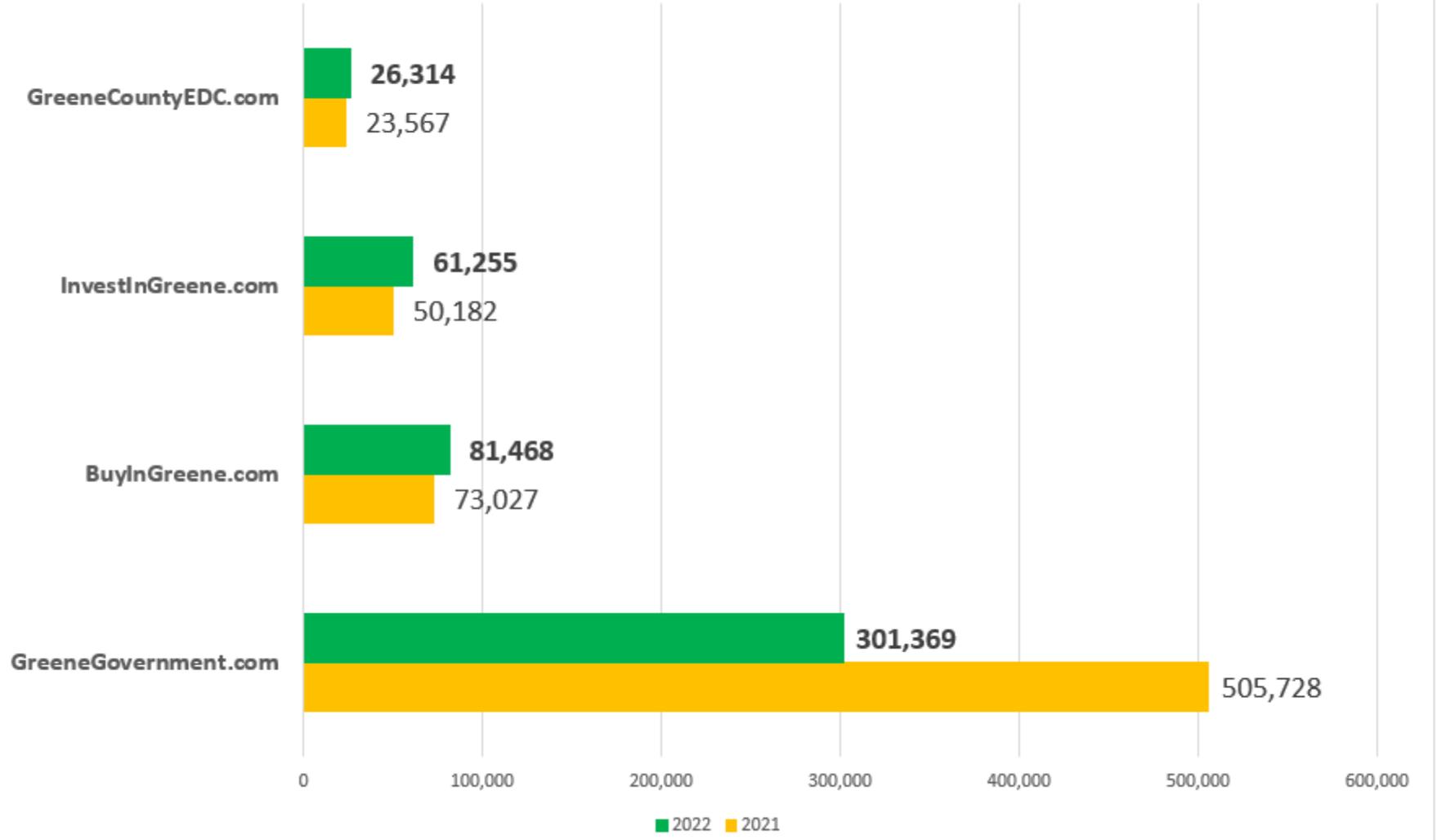
Continue producing engaging content and keep business listings current, and up-to-date. Utilize platforms to obtain feedback & engage visitors on items of high interest.

What we need to produce...

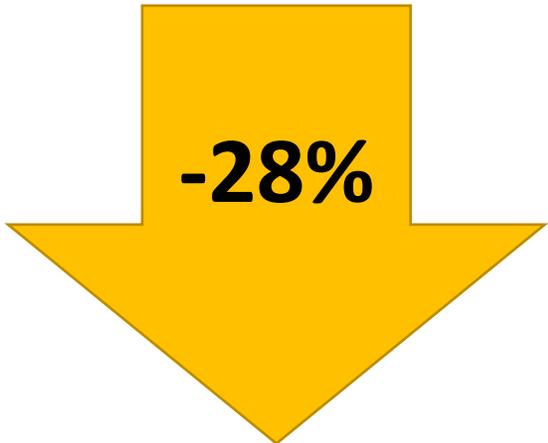
- Community-focused video and Instagram Reels citing specific businesses, events, and consumer/resident experiences.
- Integrate new content into existing pages and promote updates on relevant social media platforms.

Website Visits (Traffic) All Sites

Annual Site Visits 2021 v 2022



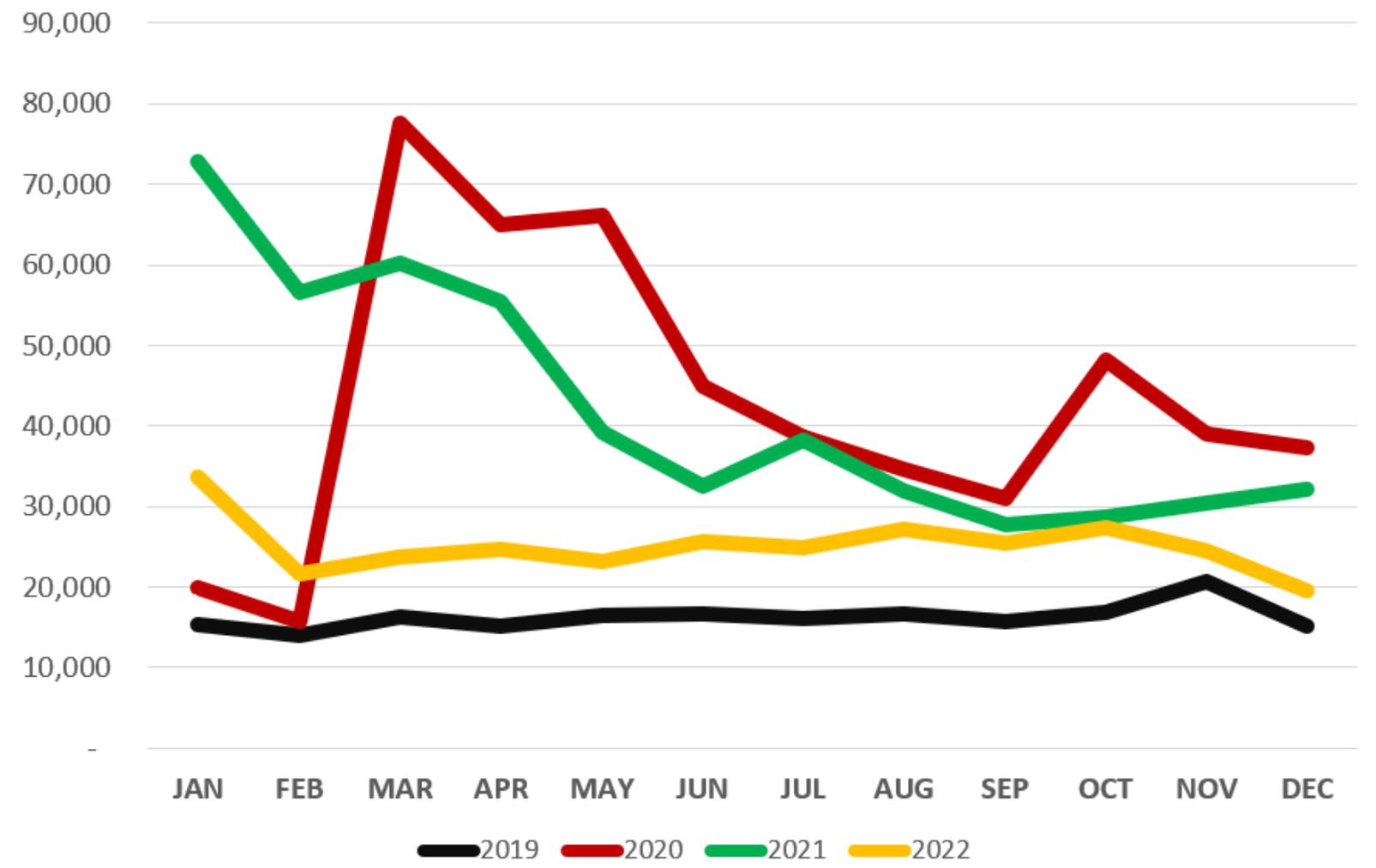
2021 – 652,504 Total Visits



2022 – 470,406 Total Visits

2022 Was UP 55% over 2019

GreeneGovernment.com Site Visits by Month 2019-2022



% over 2019

| | |
|-------------------------------------|-------------|
| 2022 Annual Visits = 301,369 | 55% |
| 2021 Annual Visits = 505,728 | 160% |
| 2020 Annual Visits = 517,498 | 166% |
| 2019 Annual Visits = 194,841 | |

What this means...

We are definitely post-COVID, but the platform can handle significant traffic and has 1/3 more monthly visits than 2019.

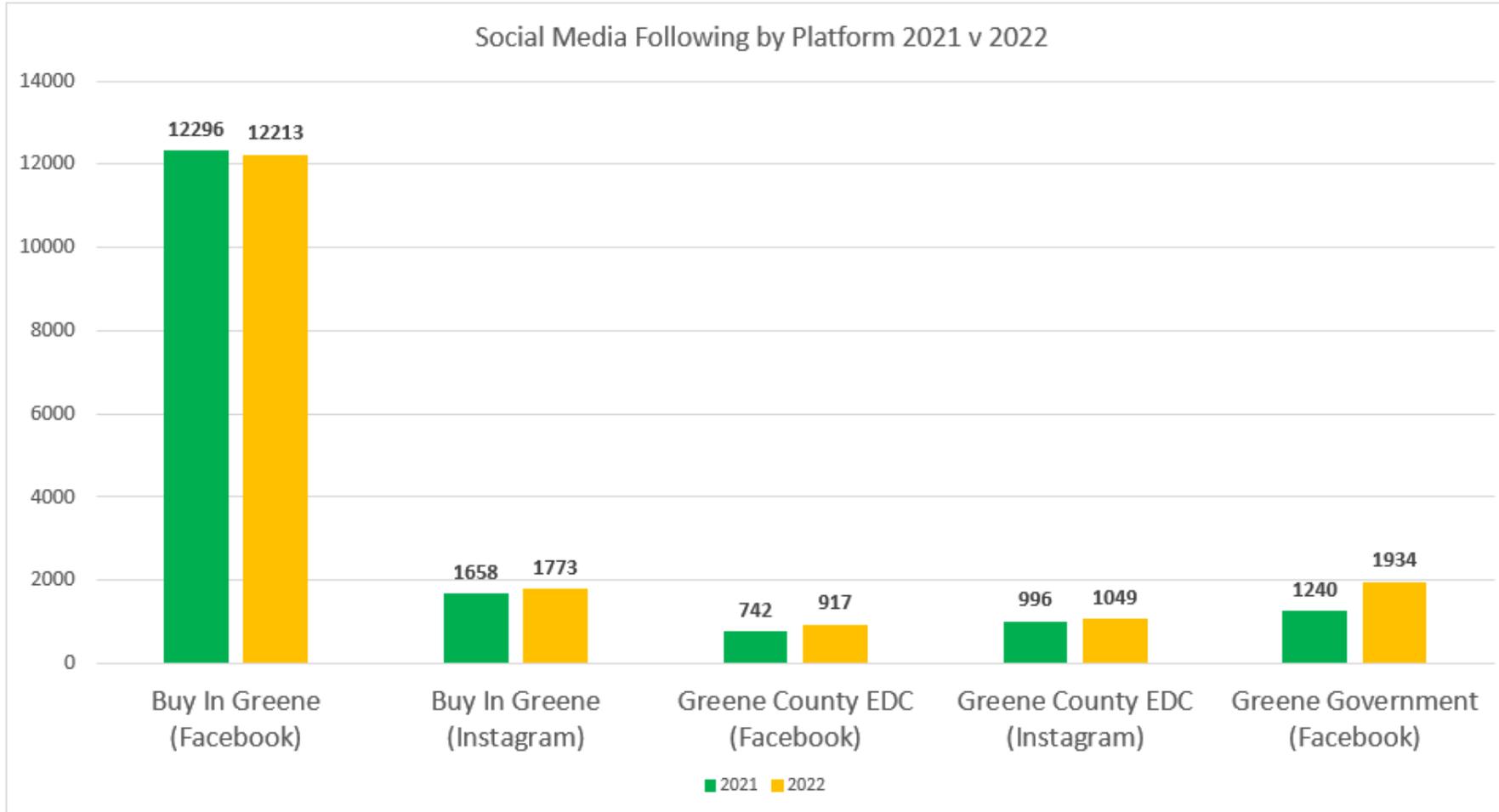
How we can capitalize on it...

Add resources that are most requested by constituents, and proactively define upcoming news releases that will engage local & regional media citing the good work done by Greene County Government.

What we need to produce...

- More releases, announcements, and vital information for GC Residents
- Establish a Greene Government Instagram Account, and produce Reels and Stories based on high-interest topics.

Social Media Following



2022 – 17,886 Total Following

6%

2021 – 16,932 Total Following

What this means...

Each platform has its own purpose/following and content must be tailored to each specifically. Facebook for links, Instagram for pictures & reels, LinkedIn for context specific to EDC.

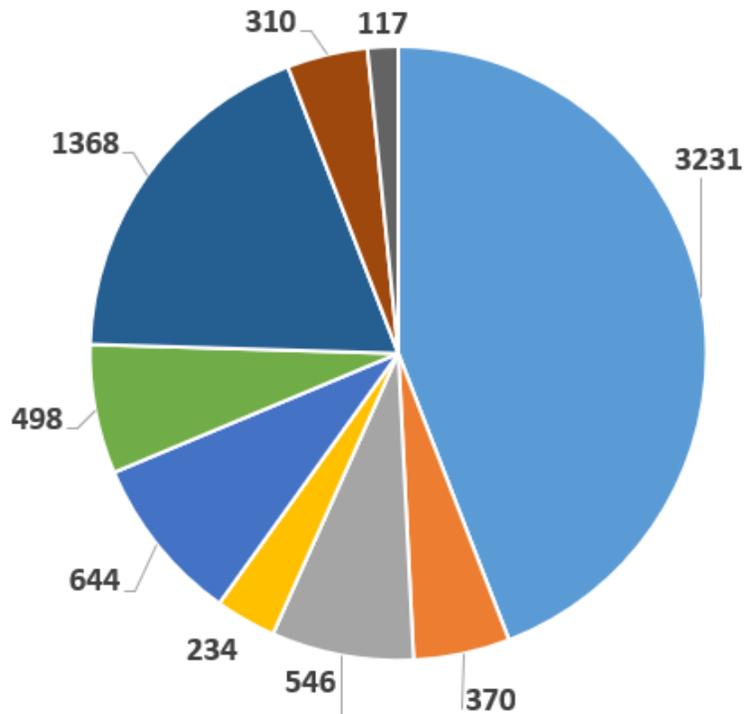
How we can capitalize on it...

Create Platform-specific social messaging and images mindful of audience, topic, and relevance.

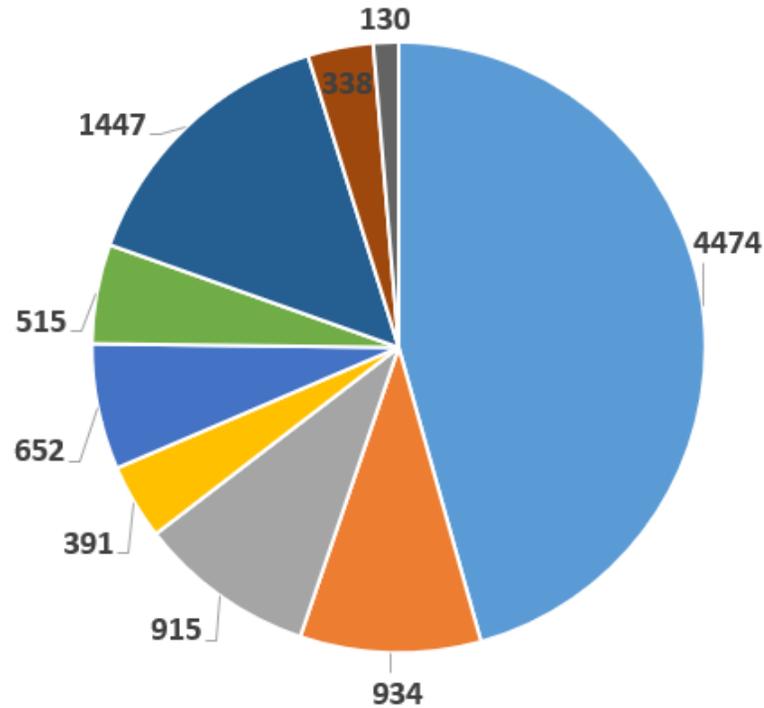
What we need to produce...

- Instagram Reels & Stories engaging consumers and promoting businesses and their communities on Buy In Greene platforms.
- Instagram Reels & Stories relevant to investment, business attraction, and workforce development on EDC platforms
- Relevant content specifically targeted at the Econ-Dev community on EDC LinkedIn

eBook Downloads Thru 2021



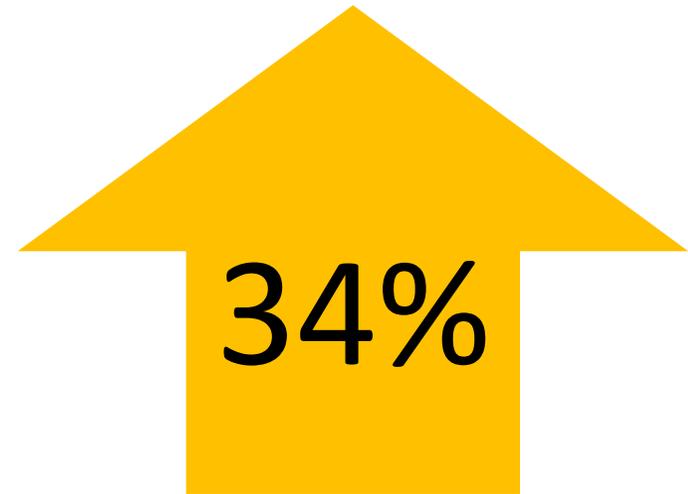
eBook Downloads Thru 2022



- "Starting a Small Business"
- "How to Start an On-Line Business in Greene County, NY"
- "Emerging Business Categories Positioned for Growth in Greene County, NY"
- "The Growing Creative Economy in Greene County, NY"
- "Starting a Microbrewery in Greene County, NY"
- "The Time is Right to Start a Micro Distillery in Greene County, NY"
- Phase 1 FREE Business Plan Template
- Phase 2 Establishing Your Business - A Guide
- Phase 3 Obtaining Business Financing - A How-to Guide

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Thru 2022 – 9,796 total downloads



Thru 2021 – 7,318 total downloads

eBooks are focused on starting a business in Greene County and advertised in the Social Media feeds of people interested in starting their own business.

What this means...

Interest has increased in starting a business and starting an online business. Overall database has reached almost 10,000

How we can capitalize on it...

Segment the database by topic and location, starting with Greene County residents, then systematically widening the radius for direct, personal engagement.

What we need to produce...

- Targeted offers, stories and surveys for direct distribution to engaged downloaders.
- Qualification methodology for those responding to the above, and personalized contact to engage them on their specific needs and challenges.

Positively Greene



COUNTY-WIDE UPDATE



GreeneGovernment.com

GreatNorthernCatskills.com

GreeneCountyEDC.com

InvestInGreene.com

FilmInGreene.com

Special Edition: 2022 A Year-In-Review

January 2023

2022 witnessed the beginning of the post-pandemic economic recovery. The unprecedented federal funding received by both Greene County and New York State has enabled some incredible projects to begin, and many community development programs to flourish. Your Greene County Legislature remains committed to delivering investments that improve the lives of our residents, keep property taxes low, and move our county forward with the infrastructure expansion required for sustainable growth.

Legislative Actions

Limiting NYC Watershed Land Acquisitions in Greene County



Positively Greene

2022 – 2,110 Total Subscribers

8%

2021 – 1,945 Total Subscribers

Avg Open Rate: 49% v 43%

Total Reads up 24% YoY

KathodeRay
VEEVA INC

DESIGN
IMPLEMENTATION
RESULTS

What this means...

The continuing monthly growth in opt-in subscribers demonstrates clear interest in the topics covered in PG. The exceptional open and read rates demonstrate a genuine desire for the information provided.

How we can capitalize on it...

Continue to provide engaging content, explore the ability to be more proactive in establishing the Monthly Content Calendar by identifying upcoming topics, and not waiting until the final week of the month to compile the entire matrix.

What we need to produce...

A proactive monthly content matrix that enables us to get ahead of the game in story development for Economic Development, Tourism, and Planning topics timely to each month.

**INVEST
GREENE**



GREENE COUNTY E.D.C.

ECONOMIC DEVELOPMENT CORPORATION

December 2022

Fostering Forests is a Family Focus at B&B Forest Products in Cairo, NY



Jennifer DeFrancesco is a true advocate for sustainable forestry in our local communities. Her father, Bill Fabian started B&B Forest Products in Greene County over 35 years ago. Their business employs 38 people and serves as a marketing conduit for small, independent loggers to get their harvested logs to buyers across the country and around the world.

Monthly eNewsletter to eBook Downloaders

2022 – 7,777 Total Subscribers

27%

2021 – 6,116 Total Subscribers

Avg Open Rate: 32% v 15%

Total Reads up 164% YoY

What this means...

eBook downloaders are clearly interested in the communities of Greene County, the available resources, and opportunities to live and work here.

How we can capitalize on it...

Leverage the vitality of our communities and the types of businesses within each. Also, Identify prospective community needs that may encourage a new business to locate here to capitalize on those needs.

What we need to produce...

Community-specific and opportunity-specific content for deployment on all relevant platforms, providing opportunities for direct response.

**INVEST
GREENE**



GREENE COUNTY E.D.C.

ECONOMIC DEVELOPMENT CORPORATION

December 2022

How Would You Invest \$25,000 in Your Greene County Business?



The Greene County EDC is launching a new survey to gauge existing and aspiring entrepreneurs on how they would spend \$25,000 in their business. The survey was created to understand the level of need in private investment in preparation of anticipated microenterprise grant funding. Answers to the survey will be used to supplement a statement of need description for the grant's reapplication requirements. Please help create feasibility for microenterprise grant funding by taking the survey.

Monthly eNewsletter to Greene County Businesses

2022 – 834 Total Subscribers

0%

2021 – 837 Total Subscribers

Avg Open Rate: 37% v 25%

Total Reads up 16% YoY

KathodeRay
VEEVA INC.

**DESIGN
IMPLEMENTATION
RESULTS**

What this means...

The number of opt-in subscribers is equivalent to 2/3s to 3/4s of Greene County businesses. New subscribers come in each month and older subscribers leave – presumably due to new business starts, and existing business closures and/or sales.

How we can capitalize on it...

Include an updated resource list, including funding sources and legislation that affects their business.- add a link to a contact/feedback form on GreeneCountyEDC.com.

Advise businesses to update their listing with special deals in advance of each promotion

What we need to produce...

- A methodology to gauge the needs of local businesses, and encourage them to provide feedback that we can act on.
- A response mechanism that ensures comments and questions are addressed.

Shop in Greene
Dine in Greene
Live in Greene

**BUY IN
GREENE**



December 2022

Last Minute Holiday Shopping



Still looking for that extra special holiday gift? Maybe you just want to put the finishing touches on your holiday décor. Our local business community is ready to help you find just the right thing! From gift certificates to merchandise, get great gift ideas on BuyInGreene.com and check out individual business listings for hours of operation.

Monthly Consumer eNewsletter

2021 – 1,211 Total Subscribers

-4%

2022 – 1,169 Total Subscribers

Avg Open Rate: 33% v 20%

Total Reads up 48% YoY

What this means...

The overall glut of promotional eMail has made consumers more likely to engage with their smartphones rather than even open traditional eMail that is perceived as a solicitation.

How we can capitalize on it...

Separate this eMail from the monthly distribution strategy, and rather distribute it just in advance of each consumer promotion in-market: Winter; Spring; Moms-Dads & Grads; Summer; Back to School; Fall; Holiday.

What we need to produce...

Community content specific to each seasonal promotion, and messaged appropriately – supported by social media posts, reels, stories and advertising.



November 14, 2022

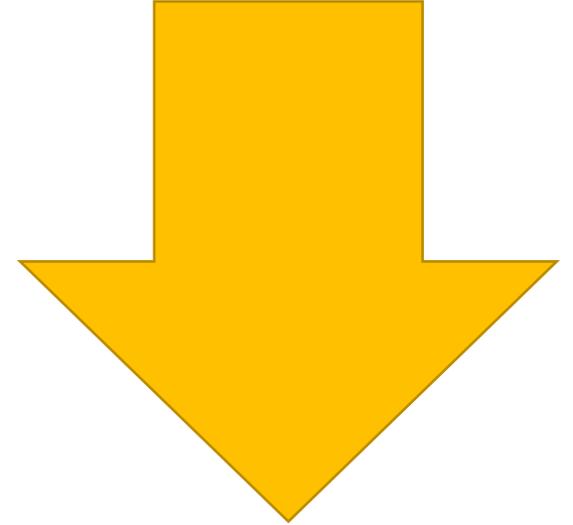
Greene County to Provide \$2.2 Million for Last Mile High Speed Fiber Internet to Unserved Roads and Households



Catskill, NY - November 14, 2022 - At its November 14th meeting, the Greene County Legislature authorized the execution of three contracts with Local Internet Service Providers (ISPs), including, Mid-Hudson Cable, Margaretville Telephone Company, and Charter Communications providing funding to assist with the installation of High Speed Fiber Internet to unserved areas of Greene County.

eNews Releases (Greene Government & EDC)

2021 – 31 Releases (7 COVID)



2022 – 14 Releases (0 COVID)

Avg Open Rate: 44% v 37%

Total Reads down 62% YoY

Without COVID down 59% YoY



What this means...

Open and Read rates on releases during COVID were understandably high. Last year topics that would have been released under the EDC brand were released under GG. The overhaul, segmentation and update of our media/influencers list has significantly increased media pick-up.

How we can capitalize on it...

Clearly define what will be released under the GG brand vs the EDC brand, and ensure at least 1 monthly release is created for each platform

What we need to produce...

A proactive media release calendar for both GG & EDC, initially populated with subjects we know are coming in each appropriate month. Ad Hoc releases can always be created as news arises.

Greene County Success Stories

From the Franklin Street to the River, Second Street Abounds with Local Gems in Athens, NY

October 13, 2022

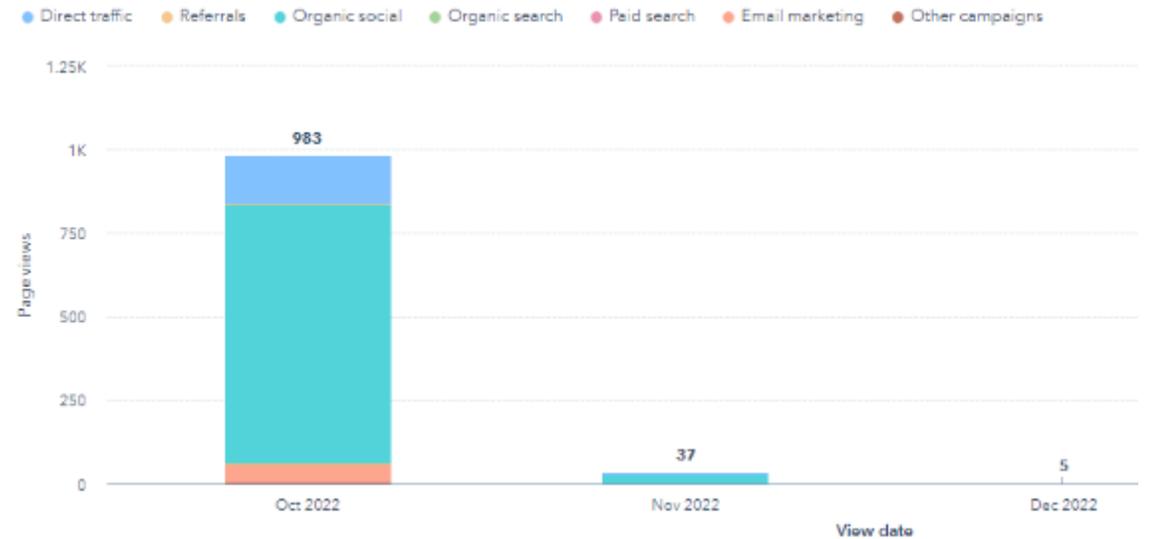
Tweet Share Like Share



2022 Success Stories delivered over 10,000 reads

**12%
YoY**

Page views ▾



What this means...

The individual, optimized web page where each success story is published continues to attract site visitors based on organic searches on the topic, location, or industry.

How we can capitalize on it...

Augment each Success Story with additional links, video, and content relevant to the topic. Optimize additional content to enhance organic search. Promote each story through not only eNewsletters and linked Facebook posts, but with Instagram Stories and Reels.

What we need to produce...

- Additional content on both the business and/or business group as well as community-specific links, stories, and reels.

Buy In Greene – Consumer Engagement, Promoting Local Businesses



- Leverage the gains made in Web Visits and Social Media Following reach more consumers.
- Solicit new and existing businesses to maximize their free listing on BuyInGreene.com
- Extend Advertising to include more local consumer awareness
- Explore and Implement Native Advertising where most effective.



Invest in Greene – Economic Development, New Business Attraction, Living & Working in Greene County



- Continue to expand the Virtual Greene program adding more locations, businesses and community assets.
- Draw focus to specific communities through Reels and Native Advertising.
- Engage young people preparing for and attending colleges, universities, and technical training to keep them connected with Greene County communities and local/regional career opportunities.

Greene Government – Public Awareness, Community Involvement



- Communicate the execution of the ARPA investments to county residents.
- Continue to build systems and procedures that will enhance communication of vital information.
- Communicate the excellent work done by county departments and legislators
- Promote community events, projects, and programs in cooperation with town & village municipalities



Looking Ahead Tactical Implementation for 2023

Buy In Greene – Consumer Engagement, Promoting Local Businesses



- Develop engaging video/animated advertising for specific components of each promotion
- Develop Instagram Stories & Reels on new and legacy business successes and communities
- Adjust eNewsletter distribution to coincide with each seasonal promotion
- Adjust Social Media content for what each platform does best



Invest in Greene – Economic Development, New Business Attraction, Living & Working in Greene County



- Leverage the vitality of our communities and the types of businesses within each.
- Identify prospective community needs that may encourage a new business to locate here to capitalize on those needs.
- Create a methodology to assess and identify the needs of both prospective and local businesses
- Implement a LinkedIn strategy and adjust Social Media Content for what each platform does best.

Greene Government – Public Awareness, Community Involvement



- Create a clear distinction what types of media releases are distributed under GG vs EDC
- Implement an Instagram Account to leverage community-based Reels and Stories
- Review all page content on GreeneGovernment.com to update/remove anything outdated.
- Create a proactive media release schedule to issue at least one release per month
- Get more Greene County Residents to utilize the information contained on websites and social media platforms.



Positively Greene

COUNTY-WIDE UPDATE



GreeneGovernment.com

GreatNorthernCatskills.com

GreeneCountyEDC.com

InvestInGreene.com

FilmInGreene.com

Special Edition: 2022 A Year-In-Review

January 2023

2022 witnessed the beginning of the post-pandemic economic recovery. The unprecedented federal funding received by both Greene County and New York State has enabled some incredible projects to begin, and many community development programs to flourish. Your Greene County Legislature remains committed to delivering investments that improve the lives of our residents, keep property taxes low, and move our county forward with the infrastructure expansion required for sustainable growth.

Legislative Actions



Limiting NYC Watershed Land Acquisitions in Greene County

In their first full session of 2022, the Greene County Legislature unanimously

adopted a resolution designed to limit the ability of the New York City Department of Environmental Protection to purchase more land in Greene County. Under Resolution 13-22, Greene joins Delaware County in support of a new plan that would replace NYC purchases with leases held by the local municipalities where the land is located.

<https://www.greenegovernment.com/scoop/limiting-watershed-acquisition>



Responding to NYS Gas Tax Holiday

As gas and diesel prices rose to record heights, NYS implemented a state-wide gas tax holiday effective from June through December. The Greene County Legislature chose not to exercise an optional county tax holiday, as it wholly believes that taxes derived from high gas prices can be most effectively applied to keeping property taxes low for Greene County residents.

<https://www.greenegovernment.com/scoop/new-york-state-implementing-gas-tax-holiday-greene-county-opts-out-of-local-option-in-favor-of-keeping-property-tax-levy-flat>

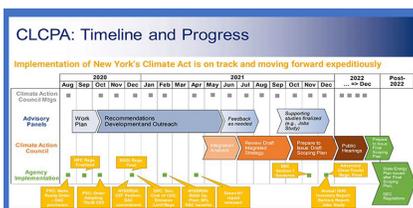


Holding the Line on Property Tax

For a fourth successful year, there will be no increase in the overall property tax levy, Greene County will hold the line and not exceed the NYS Property Tax Cap Legislation. Our

success at maintaining a consistent property tax levy level is based on both our sales tax collections and our judicious use of fund balances. As the growth in the sales tax has continued over the last three years, we have used that revenue to keep property taxes low.

<https://www.greenegovernment.com/scoop/no-property-tax-increase-2023>



Opposing NYS Mandates without Local Input

In April of 2022, The Greene County

Legislature unanimously adopted Resolution # 130-22 detailing the specific adverse effects on county residents and businesses as dictated by the NYS Climate Leadership and Community Protection Act. The board then directed County Planning to submit the comments contained in the resolution, and an accompanying climate report prepared for Greene, Delaware and Schoharie Counties to the NYS Climate Action Council.

<https://www.greenegovernment.com/scoop/opposition-clcpa-draft-plan>

Funding Last-Mile Broadband Connectivity



At its November 14th meeting, the Greene County Legislature authorized the execution of three contracts totaling \$2.2 million with ISPs Mid-Hudson Cable, Margaretville Telephone Company, and Charter Communications providing funding to assist with the installation of High-Speed Fiber Internet to unserved areas of Greene County. In this unique public/private partnership the County funding will enable the installation of High-Speed Fiber Internet to 1,400 addresses on 112 miles of unserved roadways. The County's contribution will fund the most difficult last-mile roads.

<https://www.greenegovernment.com/scoop/greene-county-to-provide-2-million-for-last-mile-high-speed-fiber-internet-to-unserved-roads-and-households>

Legislature Funds EMT Certifications



Greene County took action to attract candidates to take Emergency Medical Technician training to serve as first responders. The legislature unanimously authorized payment of the \$800 fee in exchange for a commitment to serve as an EMT for 18 months in Greene County upon completion of the training.

New Business Growth/Projects

Hunter Received \$1.97 Million NYS Grant



This award enables the Village of Hunter to relocate its fire station 0.15-miles west of its current site taking it outside of the regulatory floodway and the 100- year and 500-year flood hazard

areas of the Schoharie Creek. The existing fire station and back building will be demolished and replaced with a municipal park with streamside access. Currently, the existing fire station becomes inaccessible during even moderate flood events due to the undersized bridge. Relocation of the firehouse will allow for the expansion of the bridge and greatly alleviate flooding throughout the village.

Windham Adopts Comprehensive Plan



Upon receiving funding for an update through the Catskill Park Community Smart Growth Grant Program, the town produced a Comprehensive plan to provide a balance between accommodating future growth and preserving the quality of life and natural resources that makes Windham a special place. Challenges will included local housing needs, the need for regulation of short-term rentals and the need for additional/updated land use controls including the consideration of zoning.

growth and preserving the quality of life and natural resources that makes Windham a special place. Challenges will included local housing needs, the need for regulation of short-term rentals and the need for additional/updated land use controls including the consideration of zoning.



Restoration and Clean Energy Funding for Athens

The Historic Athens Lighthouse received a \$500,000 restoration grant from NYS to refurbish the roof and gutter system

of the 147 year-old building. The Village of Athens became a Clean Energy Community last year under the NYSEDA Clean Energy Communities Initiative. This qualified the municipality to receive \$20,000 in funding through the state's point-based award system. The village completed a series of climate-friendly tasks including securing the commitment of 10 residents to enroll in a community solar program. The village can use the awarded funding to upgrade its energy infrastructure as it sees fit.

Infrastructure Improvements to Attract New Development

Three partner projects between Greene County and the Greene IDA will be providing infrastructure necessary to attract and retain businesses that provide products, services and contribute to economic growth. Extension of natural gas



lines will service the Exit 21 West property. Stewarts Shops will expand to a new location at the Exit 21 East property along with a new hotel. Construction of a water/sewer extension will create shovel-ready properties for development at a site on

NYS 23 in Cairo. <https://www.greenegovernment.com/news-press/the-greene-county-industrial-development-agency-announces-major-progress-on-two-business-parks-located-off-exit-in-catskill-ny>

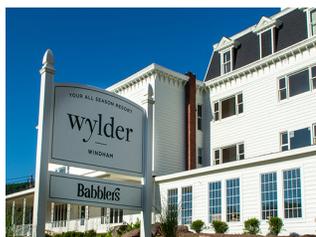
County Funds Improvements to Cairo Town Park



Extensive improvements were made at Angelo Canna Town Park in Cairo as the county and the town invested in the future of the public space. Completed just in time for last year's Memorial Day parade, the main access road, playground and 90 new parking spaces were

paved and painted. This investment in the park supports wonderful recreational opportunities including baseball, football, basketball, walking paths, and picnic areas. It is also essentially the county fairgrounds which hosts the annual Greene County Youth Fair among other events. https://www.hudsonvalley360.com/news/greencounty/county-funds-canna-park-improvements/article_2ffb7ead-9d09-58d1-bdf6-0aac86ca22f4.html

Wylder Windham Opened Last Summer



Formerly known as the Thompson House owned by the Goettsche family for over 6 generations, the hotel underwent a 20 million dollar renovation and offers 110 rooms, oversized outdoor heated pool, sauna, pickle ball, Babblers' Restaurant

& Bakery, and 4,000 square feet of special event and wedding space. Visit this newly designed property at: <https://wylderhotels.com/windham/>

Major Progress in Exit 21 Project



In October, the Greene County Industrial Development Agency issued a status update on two business parks on the east and west of the NYS Thruway

in Catskill. The Greene IDA began work on a 60-acre business park on Route 23B in 2017, acquiring eight parcels, completing an environmental impact statement, and mitigated sensitive archaeological areas in order to attract new businesses. The IDA was pleased to announce that Bell Jar Holdings Co., Windsor Hospitality Management and Stewarts Shops will be developing these shovel-ready sites. <https://www.greeneida.com/sites-projects>



Hotel Lilien Opened in Tannersville

Formerly known as the Washington Irving Inn, the fully renovated hotel will be open year-round. Featuring 18 curated

boutique hotel rooms, complimentary breakfast, and a cocktail bar, it is only a stone's throw from Hunter Mountain. It's a place where locals and visitors can gather around the same wood-burning stove to clink craft beers, share stories, and take in the views of Hunter Mountain. Find out more about Hotel Lilien at <https://www.greatnortherncatskills.com/resorts-lodging/hotel-lilien>

Ground Broken for Thomas Cole Visitor Center



State and local representatives joined the leadership team of the Thomas Cole National Historic Site last month to break ground for the \$1.3 million Cole Center. Empire State Development awarded the project some \$360,000 with the remainder funded

through private donations. The new visitor center is projected to triple the amount of visitors welcomed to the site each year, and celebrate the impact that the Hudson River School of Art continues to have on our local economy.



Village of Tannersville Received DRI Funding

Eleven transformational projects were funded by a \$10 million NYS Downtown Revitalization Initiative award in the areas of: Increasing Housing Opportunities, Enhancing the Village's Culture and Arts Scene, and

Improving Streetscape Walkability and Connectivity. The strategic goal of the DRI is to enrich upstate communities to enhance local economies.



Investment and Upgrades at the Cohotate Preserve

During a special Community Resources Committee meeting in April, the Greene County Legislature unanimously approved a resolution to submit an application to NYS that will provide \$100,000 toward improvements to the preserve in Athens. The county is committing an additional \$250,000 and the GC Soil and Water Conservation District will contribute \$400,000. The site that hosts C-GCC environmental studies classes will see improvements in its heating and cooling, electrical systems, bathrooms and water supply.

https://www.hudsonvalley360.com/news/greencounty/cohotate-preserve-targeted-for-investment-upgrade/article_49832b1e-49a9-5cf2-ab00-87cb97e9a5eb.html

Indicators/Statistics



Taxable Sales in Greene County Surpass \$1 Billion in 2021

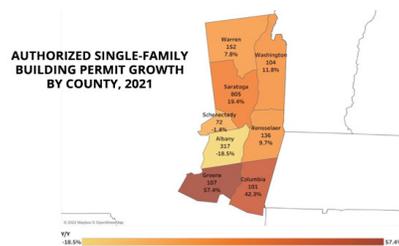
Beginning In 2019, taxes on internet purchases are paid to the state the goods are shipped to (not where they came from). This, combined with changes to shopping habits during the pandemic set a new record for 2021 - a strong indicator of our economic growth. NYS Payments to the County in 2021 surpassed 2020 by over \$6.5 million (2021 figures are not reported until 2022). This is the 12th year in a row that sales tax revenue has risen over the previous year. Commitment to fiscal responsibility by the Greene County Legislature continues to keep property taxes among the lowest in the state.



Greene County Sees Gain in Population in March 2022 Report

The county's population increase is based on domestic migration; more people moving in than moving out. The largest relative increases in population due to net migration in the State were found in Greene County (1.84%). Of the 30 counties that gained population due to domestic migration, Greene (1.84%) and Hamilton (1.70%) Counties experienced the largest gains. Greene County experienced a natural decrease of 272 residents; that is there were 637 deaths and 365 births estimated during this same time period.

Greene County Leads in Building Permits



In a May 2022 report, the number of single-family building permits authorized in the Capital Region climbed to a 14-year high in 2021. Already seeing some of New York's strongest growth in

domestic movers, Greene County experienced some of the state's fastest growth in single-family permitting activity, leading the region with a 57.4% year over year increase.

The Economic Impact of the Great Outdoors

| Activity | Economic Activity (Millions) | National Rank |
|------------------------------------|------------------------------|---------------|
| Boating/Fishing | \$1,486.4 | 4 |
| Festivals/Concerts/Sporting Events | \$955.1 | 2 |

Helping Greene Grow Green



Greene County Solid Waste Management invested in sustainable management of food waste and a systematic approach seeking to reduce food waste and the impact it has on our environment. This FREE program helps eliminate non-wasteful food products from our landfill. Greene County Solid

Waste Management purchased the EcoRich machine to turn food waste into finished compost. Once each cycle of material is broken down compost is made available to the public. <https://www.greene-governent.com/greene-government/waste-transfer-stations/help-greene-grow-green>



Group Travel Returns to Greene County in 2022

Group travel has returned and remains one of the key opportunities to bring economic growth to Greene County. Last summer Greene County Tourism launched a new section of their website to reach group travel operators not only in the Northeast but throughout the United States and internationally. In addition to the website, a new brochure was printed and distributed to key marketing partners.

See the increasing number of group offerings in Greene County at <https://www.greatnortherncatskills.com/groups>

C-Pace Financing for Energy Improvements

The Greene County Legislature is crafted a Local Law titled "Energize NY Open C-PACE Financing Program" that authorizes property assessed clean energy financing to Qualified Property Owners for the installation of renewable energy systems and energy efficiency measures. It can be found at https://www.greene-governent.com/wp-content/uploads/2022/05/Local-Law-2-of-2022_WH-05172022.pdf

Buy In Greene Annual Holiday Campaign for Local Businesses



For the 5th year in a row, the Buy In Greene team partnered with Jon Meredith's Music Technology students at Greenville High School to produce its annual holiday jingle. Set to the tune of a memorable holiday song, the students provided the orchestration, backing vocals, and digital production of this 60-second radio spot, which also serves as the soundtrack for a digital video ad! Advertising promoted buying local from November 1st through the end of December on local radio stations and digital platforms in addition to print ads and social media posts. Watch the sing-along at <https://www.buyinggreene.com/holiday#video>

Recognition/Celebrating Successes

New Resorts Showcased in Times Union



In December 2021, Lauren Breedlove, a writer for the Times Union, connected with the Tourism Department to showcase resorts opening in 2022. The James Newbury Hotel/Wire Events Center and Wylder Windham were recommended. Lauren worked with the tourism department, Justin D. Smith, President, and Ann Cloutier, VP Sales & Marketing, representatives for James Newbury Hotel, and John Flannigan, Founder & CEO of Wylder Windham. Check out the article at <https://www.timesunion.com/hudsonvalley/travel/article/6-new-Catskills-resorts-to-open-in-2022-16758006.php>



Round Top, Catskill & Windham Named Best Small Towns

As part of their scope of work as agency of record for the Tourism Department, Workshop coordinates with publications to present Greene County as a travel destination of choice. Last year they worked with Perri Ormont Blumberg, of Travel & Leisure, on a story showcasing the Best Small Towns of the Catskills. It is no surprise that Round Top, Catskill and Windham were included.



Piaule Catskill Featured in Canadian Magazine

SHARP, a Canadian publication, featured a story on Piaule Catskill designed to attract visitors in the 2022 season. The publication is full of the latest in fashion, luxury travel, technology, automobiles, food, entertainment and celebrities, as well as feature-length investigative journalism on topics of international importance. SHARP's consistently premium environment speaks directly to the discerning tastes of Canada's largest audience of affluent, intelligent and influential men. Read the full article: <https://sharpmagazine.com/2021/12/21/piaule-catskill-new-york-review/>

Infrastructure, Workforce & Natural Resources

Cannabis Opt-Out Portal Created



As towns and villages considered passage of local laws and regulations governing the time, place and manner of adult-use retail dispensaries and onsite consumption licenses, the New York State Office of Cannabis

Management (OCM) opened a web-based portal (<https://cannabis.ny.gov/local-government>) with municipal opt-out and opt-out repeal information as well as a fact sheet. Based on the information filed with OCM, about 11% of cities and 37% of all municipalities have opted out of all cannabis sales.

NY Naval Militia Boat Christened



On April 30, New York's naval force officials welcomed its newest addition, LC-351, a 39-foot landing craftstyle boat, at the Historic Catskill Point. The boat can carry supplies, people, and a

small vehicle, and has the ability to go ashore. Read the article at https://www.hudsonvalley360.com/artsandlife/localannouncements/newyork-naval-militia-boat-christened-in-catskill-ceremony/article_d2c56f25-2cdc-53a5-9a45-317e621e45d1.html

Emergency Services Online Survey



The Greene County Comprehensive Emergency Management Plan (CEMP) defines the county's overall emergency management program, including preparedness, mitigation, response, and

recovery. The team updating this plan included relevant county departments & agencies, as well as representatives of the 19 towns and villages of Greene County. Residents and business owners were encouraged to complete a survey on how well they are prepared for an emergency event. Responses were compiled and addressed as part of CEMP update process.

Workforce Career Connector



More and more employers in Greene County (and throughout the Capital Region of New York State) are continuously seeking qualified workers to fill open positions. The majority of

these well-paying jobs do not require a 4-year college degree, so the county created an online resource that helps residents identify the employment sectors critical to the Greene County economy, and the courses and certifications available to obtain jobs in those areas. The Greene County EDC works closely with Columbia-Greene Community College to promote these opportunities to potential students of all ages. Visit the Career Connector at <https://greenecountyedc.com/workforce-career-connector/>

Course Offerings Expand at C-GCC



Columbia-Greene Community College was awarded \$1 million NYS Grant for expansion of its Construction Technology Center. With this grant, the college can become the go-to for building trades training, specifically in

historic restoration and preservation. The college has also developed a program of cannabis-related courses to keep up with changes brought about by the legalization of cannabis in New York State and tremendous projections for new jobs and industry growth. Last fall, it began offering two programs that specialize in distinct areas of training, one in business and the other in science. NYS has provided \$5 million to support the courses offered at 4 SUNY Community Colleges. Schenectady County CC is serving as lead campus in the cannabis course program for three regional colleges: C-GCC, Adirondack CC and Fulton-Montgomery CC.

<https://www.sunycgcc.edu/academics/programs-of-study/construction-technology/>

Skilling The Gap



In October of last year, the Berkshire Taconic Community Foundation, Columbia-Greene Community College, Columbia Economic Development Corporation, and Greene County

Economic Development Corporation partnered to host Skilling the Gap, a half-day forum for employers, schools, community-based organizations, and funders to generate new ideas and partnerships for a thriving economy. The free event was held Friday, Oct. 21, from 8:30 a.m. to 1:00 p.m. at C-GCC.

Architects & Construction Management Firms Hired

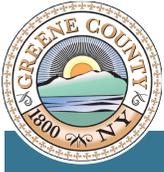


Greene County has issued contracts for design an construction services for the new Justice Center adjacent to the Greene County Court House, The firm of Lacey, Thaler Reilly Wilson (LTRW) of Albany has been retained for this project.

ARPA Funds Applied to Cairo Water & Sewer



The Greene County Legislature voted unanimously to enter into an agreement with Greene IDA to contribute \$875,000 of federal rescue plan funding to the Cairo Infrastructure Project that will provide municipal water and sewer services.



Social Media Following Quarterly Update

WINTER 2023 (Following as of January 3, 2023)

FOLLOWERS

Buy In Greene | Invest In Greene

| | | | |
|--|-----------|--------|--------------------------------------|
| | Facebook | 12,213 | @BuyInGreene |
| | Instagram | 1,773 | www.instagram.com/buyinggreencounty/ |

Great Northern Catskills

| | | | |
|--|-----------|--------|------------------------------------|
| | Facebook | 27,000 | @GreatNorthernCatskills |
| | Instagram | 26,900 | www.instagram.com/CatskillTourism/ |
| | Twitter | 2,127 | @CatskillTourism |

Greene County Economic Development Corp.

| | | | |
|--|-----------|-------|-----------------------------|
| | Facebook | 914 | @GreeneCountyEDC |
| | Instagram | 1,047 | www.instagram.com/greeneedc |

Public Health

| | | | |
|--|-----------|-------|----------------------------------|
| | Facebook | 6,300 | @GreeneNYHealth |
| | Instagram | 264 | www.instagram.com/greenenyhealth |
| | Twitter | 404 | @GreeneNYHealth |

Emergency Services

| | | | |
|--|----------|-------|-----------------------------------|
| | Facebook | 3,700 | @Greene-County-Emergency-Services |
|--|----------|-------|-----------------------------------|

Family Planning

| | | | |
|--|-----------|-----|---|
| | Facebook | 273 | @MYGCFP |
| | Instagram | 202 | www.instagram.com/greencountyfamilyplanning |

Veterans Services

| | | | |
|--|----------|-----|------------------|
| | Facebook | 733 | @greencountyvets |
|--|----------|-----|------------------|

Civil Service

| | | | |
|--|----------|-------|---------------------------------|
| | Facebook | 1,100 | @Greene-County-NY-Civil-Service |
|--|----------|-------|---------------------------------|

Human Services

| | | | |
|--|----------|-----|-------------------|
| | Facebook | 676 | @GCNYHumanService |
|--|----------|-----|-------------------|

Catskills Association for Tourism Services

| | | | |
|--|-----------|-----------------------------------|----------------------------------|
| | Facebook | 67,000 (inactive since June 2020) | @VisitTheCatskills |
| | Instagram | 42,400 | www.instagram.com/visitcatskills |

Hudson Valley Tourism

| | | | |
|--|----------|--------|----------------------|
| | Facebook | 16,000 | @HudsonValleyTourism |
| | Twitter | 11,000 | @HudValleyTravel |

Sheriff's Office

| | | | |
|--|-----------|-------|---|
| | Facebook | 7,800 | @GreeneCountySheriffNY |
| | Instagram | 72 | www.instagram.com/greencountysheriffsoffice |
| | Twitter | 89 | @GreeneSheriffNY |

Greene County, NY Government

| | | | |
|--|----------|-----------------------------|----------------------|
| | Facebook | 1,934 (launched 10/10/2020) | @GreeneCountyNewYork |
|--|----------|-----------------------------|----------------------|

Greene County Department of Economic Development, Tourism & Planning
 Warren Hart - Deputy County Administrator • 518-719-3290 • business@discovergreene.com

Great Northern Catskills of Greene County
 tourism@discovergreene.com

Greene County Economic Development Corporation
 info@GreeneCountyEDC.com

Buy In Greene | Invest In Greene
 info@buyinggreene.com

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ECONOMIC IMPACT OF VISITORS IN NEW YORK 2021

Catskills Focus

August 2022





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INTRODUCTION

PROJECT BACKGROUND

The travel sector is an integral part of the New York economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of the state's future. How critical? In 2021, tourism-supported jobs accounted for more than 6.5% of all jobs in the state.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is particularly true for New York as it builds upon its tourism economy.

METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for the state of New York. The model traces the flow of visitor-related expenditures through the state's economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.

Visitors included those who stayed in overnight accommodations or those who came from a distance greater than 50 miles and deviated from their normal routine.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis.

By establishing a baseline of economic impacts, the industry can track its progress over time.

To quantify the significance of the visitor economy in New York, Tourism Economics developed a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the visitor economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the ES202 data.

The analysis draws on the following data sources:

- Longwoods International: survey data, including spending and visitor profile characteristics for visitors to New York
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry
- STR lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels and short-term rentals.
- Tax collections: Lodging and sales tax receipts
- US Census: business sales by industry and seasonal second homes inventory
- Tourism Economics: international travel data for overseas, Canadian, and Mexican travel to New York based on aviation, survey, and credit card information

ECONOMIC IMPACTS

KEY FINDINGS

DIRECT VISITOR SPENDING IMPACT

The New York visitor economy spans multiple industries. Visitors spend directly on accommodations, food and beverage, recreation, retail shopping, local transportation and air travel. In 2021, visitors spent \$52 billion across the New York economy.

TOTAL ECONOMIC IMPACT

The direct visitor spending impact of \$52 billion generated a total economic impact of \$85.5 billion in New York in 2021 including indirect and induced impacts. This total economic impact generated \$7.5 billion in state and local tax revenues in 2021.



\$85.5 BILLION

Total Economic Impact of Tourism in New York in 2021



\$52B

Direct Visitor
Spending



\$85.5B

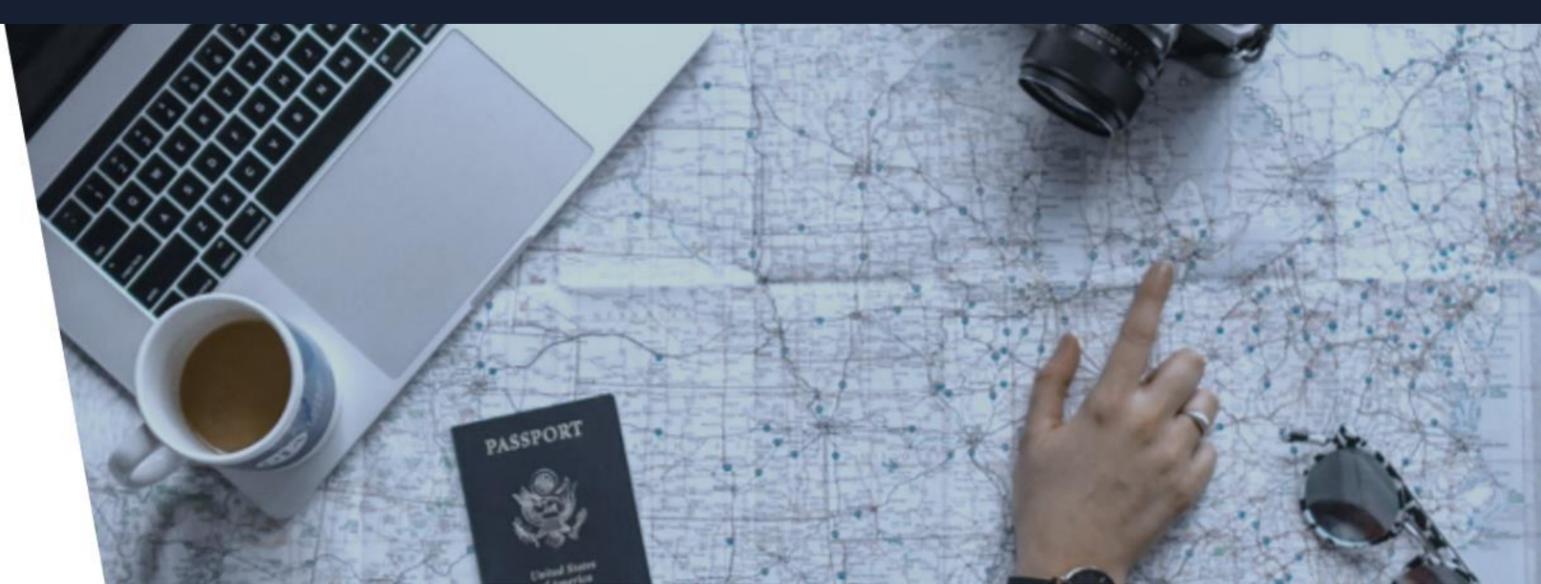
Total
Economic
Impact



\$7.5B

State & Local
Taxes
Generated





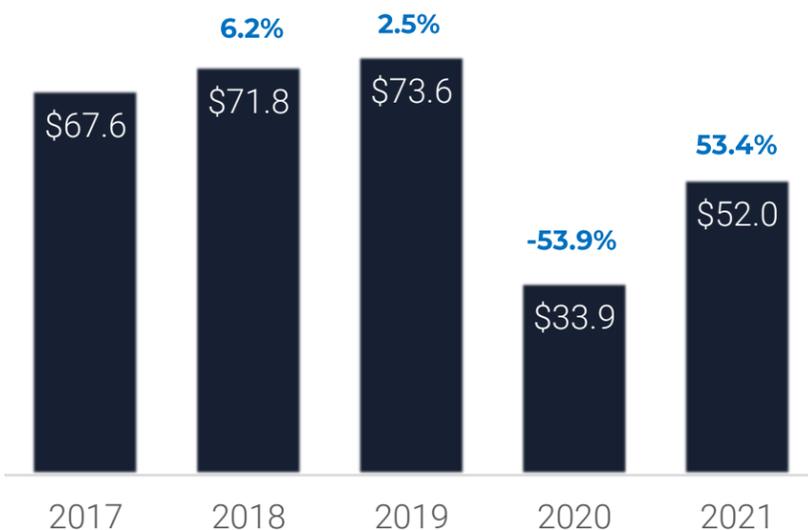
VISITOR SPENDING

The year 2021 was one of recovery for the visitor economy as direct visitor spending reached \$52 billion. This follows severe COVID-related declines in 2020.

In 2020, COVID-19 restrictions and closures harshly impacted visitation and spending, particularly for city destinations. However, in 2021, travel confidence rebounded with easing restrictions and vaccines. With an increase of about \$18 billion in visitor spending over the prior year, spending recovered to about 71% of 2019 levels.

New York visitor spending

Amounts in \$ billions



Sources: Longwoods Int'l, Tourism Economics

VISITOR SPENDING

Visitors to New York spent **\$52 billion** across a range of sectors in 2021.

Visitor spending expanded 53.4% in 2021, recovering to 71% of 2019 levels.

Of the \$52 billion spent in New York in 2021 by visitors, lodging, including the value of second homes, accounted for \$16.4 billion, 32% of the average visitor dollar. Spending on food and beverages resulted in \$13.9 billion.

Retail, including spending at service stations, captured 18%, a total of \$9.5 billion.

Transportation, including both air and transportation within the destination, comprised 14%, with recreation spending registering 10% of each visitor dollar.

\$52 BILLION

Total Visitor Spending in 2021



Source: Tourism Economics

Note: Lodging spending is calculated as an industry. Spending also includes dollars spent on second homes. Transport includes both air and local transportation.

VISITATION & SPENDING TRENDS

Visitor spending increased by 53% in 2021, a bounce back after the significant declines in 2020. Spending grew across all sectors, driven by strong room demand and increases in prices of key commodities, especially in lodging and transportation. Indeed, average room rates at hotels in the state increased 30%, with room demand increasing 40%.

Strong growth was seen in lodging, by far the hardest hit category during the pandemic. Lodging spending increased nearly 70% after a fall of 60% in 2020. Despite the strong rebound, lodging spending remains at 77% of 2019 levels.

Recreational spending grew 52% in 2021, bringing it back to 69% of pre-pandemic levels.

Visitor spending was led by growth in the domestic and North American markets, while overseas inbound arrivals and spending remained depressed in 2021 as restrictions were in place for much of the year.

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|-------------------------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------------|
| Total visitor spending | \$67.63 | \$71.82 | \$73.62 | \$33.94 | \$52.05 | 53.4% | 70.7% |
| Lodging* | \$19.96 | \$21.21 | \$21.39 | \$9.69 | \$16.45 | 69.8% | 76.9% |
| Food & beverages | \$16.17 | \$17.14 | \$17.86 | \$9.32 | \$13.92 | 49.3% | 78.0% |
| Retail & Service Stations | \$12.03 | \$13.15 | \$13.35 | \$6.40 | \$9.49 | 48.3% | 71.1% |
| Transportation** | \$12.71 | \$13.24 | \$13.72 | \$5.24 | \$7.19 | 37.3% | 52.4% |
| Recreation | \$6.77 | \$7.08 | \$7.31 | \$3.30 | \$5.00 | 51.7% | 68.5% |

Source: Longwoods Int'l, Tourism Economics

* Lodging includes second home spending

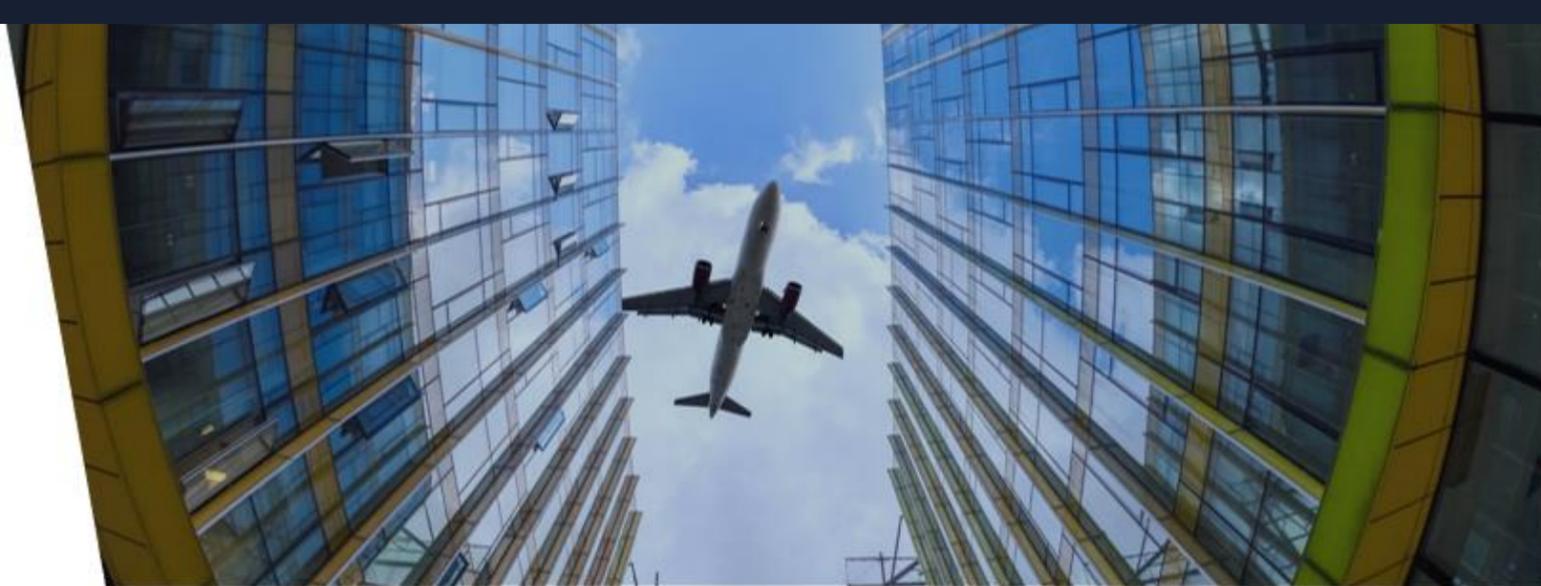
** Transportation includes both ground and air transportation

New York visitor spending, by market

Amounts in \$billions, 2021 % change, and % recovered relative to 2019

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|-------------------------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------------|
| Total visitor spending | \$67.63 | \$71.82 | \$73.62 | \$33.94 | \$52.05 | 53.4% | 70.7% |
| Domestic | \$47.22 | \$51.27 | \$52.97 | \$29.79 | \$47.39 | 59.1% | 89.5% |
| Canada | \$1.56 | \$1.60 | \$1.42 | \$0.40 | \$0.73 | 81.1% | 51.3% |
| Overseas | \$18.86 | \$18.95 | \$19.22 | \$3.75 | \$3.93 | 4.9% | 20.5% |

Source: Longwoods Int'l, Tourism Economics



ECONOMIC IMPACT METHODOLOGY

Our analysis of the New York visitor economy begins with direct visitor spending and analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the New York economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact - direct, indirect and induced - for a broad set of indicators, including:

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

ECONOMIC IMPACT FRAMEWORK

DIRECT IMPACTS

Tourism's contribution measured visitor spending



RETAIL



ENTERTAINMENT/REC



FOOD & BEVERAGE



TRANSPORTATION



LODGING

INDIRECT IMPACTS

Purchases of inputs from suppliers
Suppliers' own supply chains



SUPPLY CHAIN EFFECTS



B2B GOODS & SERVICES PURCHASED

INDUCED IMPACTS

Consumer spending out of employees' wages:



INCOME EFFECT



HOUSEHOLD CONSUMPTION

TOTAL IMPACTS

Direct, indirect, and induced impacts



SALES



GDP



JOBS



INCOME



TAXES



ECONOMIC IMPACT FINDINGS

BUSINESS SALES IMPACTS

Visitors contributed a direct impact of \$52 billion in 2021. This direct impact of \$52 billion generated \$33.5 billion in indirect and induced impacts, resulting in a total economic impact of \$85.5 billion in the New York economy, 45% more than a year earlier.

The indirect and induced effects add a total of \$33.5 billion in sales for businesses located in New York.

Outside of direct impacts, significant benefits accrue in sectors like finance, insurance, and real estate, and business services.

Summary Economic impacts (2021)

Amounts in billions of nominal dollars



Source: Tourism Economics

Business sales impacts by industry (2021)

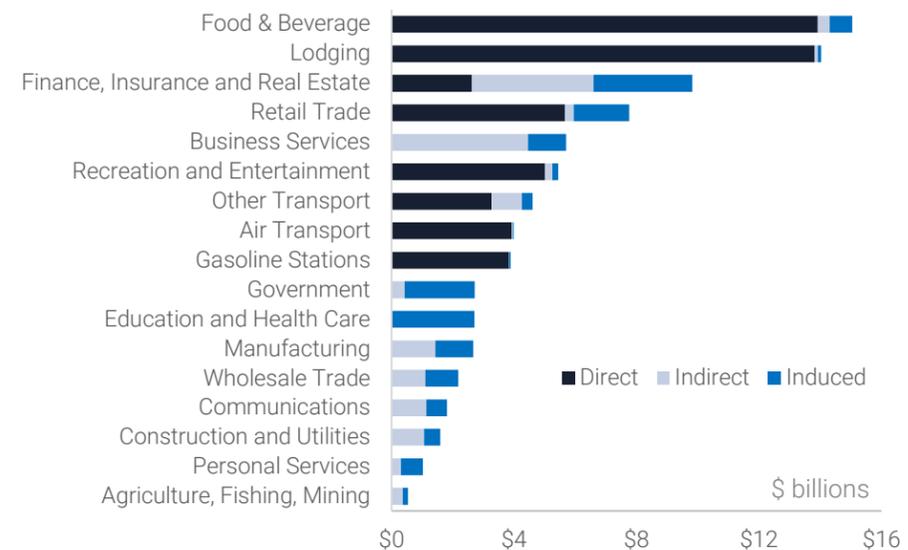
Amounts in millions of nominal dollars

| | Direct Business Sales | Indirect Business Sales | Induced Business Sales | Total Business Sales |
|------------------------------------|-----------------------|-------------------------|------------------------|----------------------|
| Total, all industries | \$52,049 | \$16,332 | \$17,123 | \$85,504 |
| Food & Beverage | \$13,923 | \$383 | \$743 | \$15,049 |
| Lodging | \$13,824 | \$96 | \$109 | \$14,030 |
| Finance, Insurance and Real Estate | \$2,621 | \$3,974 | \$3,225 | \$9,821 |
| Retail Trade | \$5,660 | \$291 | \$1,806 | \$7,757 |
| Business Services | | \$4,459 | \$1,241 | \$5,700 |
| Recreation and Entertainment | \$5,003 | \$247 | \$194 | \$5,444 |
| Other Transport | \$3,264 | \$994 | \$344 | \$4,603 |
| Air Transport | \$3,928 | \$29 | \$37 | \$3,994 |
| Gasoline Stations | \$3,826 | \$9 | \$54 | \$3,889 |
| Government | | \$422 | \$2,291 | \$2,714 |
| Education and Health Care | | \$20 | \$2,682 | \$2,702 |
| Manufacturing | | \$1,432 | \$1,236 | \$2,668 |
| Wholesale Trade | | \$1,105 | \$1,076 | \$2,181 |
| Communications | | \$1,135 | \$672 | \$1,806 |
| Construction and Utilities | | \$1,063 | \$527 | \$1,589 |
| Personal Services | | \$305 | \$721 | \$1,025 |
| Agriculture, Fishing, Mining | | \$368 | \$164 | \$531 |

Source: Tourism Economics

Visitor economy business sales impacts by industry (2021)

Amounts in billions of nominal dollars



Source: Tourism Economics

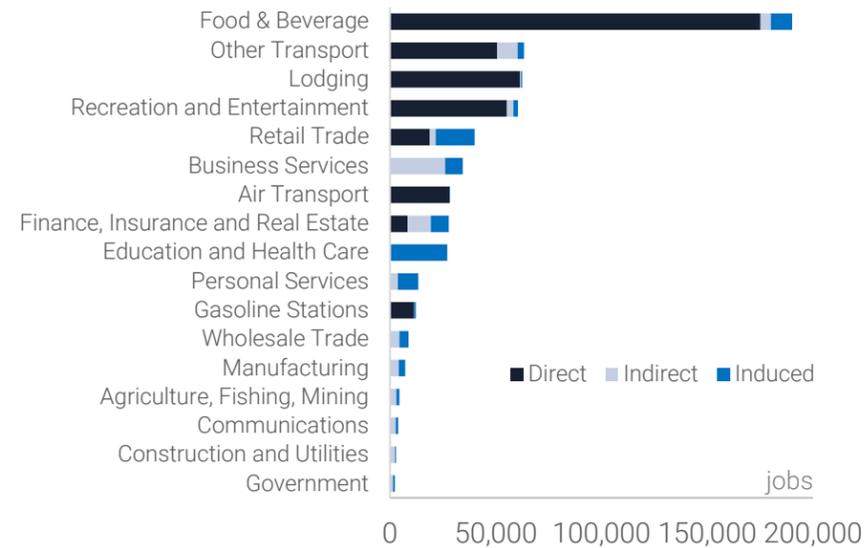
EMPLOYMENT IMPACTS

Visitor spending supports the largest number of jobs in the food & beverage industry (190,251).

Spending by businesses directly impacted by visitor spending supports 26,095 jobs in the business services industry – in areas like accounting, advertising and building services.

Tourism Job Impacts by Industry (2021)

Amounts in number of jobs



Source: Tourism Economics



Summary Employment Impacts by Industry (2021)

Amounts in number of jobs

| Industry | Direct Jobs | Indirect Jobs | Induced Jobs | Total Jobs |
|------------------------------------|-------------|---------------|--------------|------------|
| Food & Beverage | 175,203 | 4,990 | 10,058 | 190,251 |
| Other Transport | 50,702 | 9,686 | 2,953 | 63,342 |
| Lodging | 61,488 | 456 | 557 | 62,501 |
| Recreation and Entertainment | 55,354 | 2,967 | 2,181 | 60,502 |
| Retail Trade | 18,782 | 2,859 | 18,399 | 40,040 |
| Business Services | 26,095 | 0 | 8,268 | 34,362 |
| Air Transport | 28,144 | 101 | 142 | 28,387 |
| Finance, Insurance and Real Estate | 8,325 | 10,884 | 8,546 | 27,755 |
| Education and Health Care | 0 | 210 | 26,808 | 27,018 |
| Personal Services | 0 | 3,669 | 9,746 | 13,415 |
| Gasoline Stations | 11,354 | 122 | 694 | 12,170 |
| Wholesale Trade | 0 | 4,400 | 4,305 | 8,706 |
| Manufacturing | 0 | 4,106 | 3,090 | 7,196 |
| Agriculture, Fishing, Mining | 0 | 3,007 | 1,366 | 4,372 |
| Communications | 0 | 2,638 | 1,253 | 3,891 |
| Construction and Utilities | 0 | 2,343 | 525 | 2,869 |
| Government | 0 | 1,431 | 874 | 2,305 |

Source: Tourism Economics



LABOR INCOME IMPACTS

Visitor activity generated \$19.7 billion in direct labor income and a total of \$32.2 billion when including indirect and induced impacts. Total tourism-generated income in New York in 2021 rebounded 14% above 2020.

Summary labor income impacts (2021)

Amounts in billions of nominal dollars

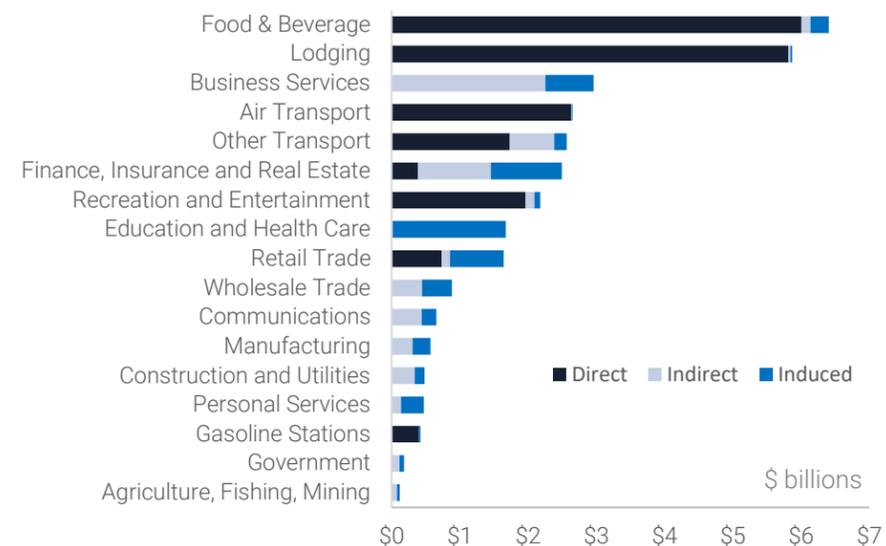


Source: Tourism Economics

There are nine industries in which visitor activity supports more than \$1 billion in personal income. These range from the obvious—food & beverage and lodging, to the less obvious—business services and education & healthcare.

Tourism labor income Impacts by Industry (2021)

Amounts in billions of nominal dollars



Source: Tourism Economics



Summary labor income impacts (2021)

Amounts in millions of nominal dollars

| | Direct Labor Income | Indirect Labor Income | Induced Labor Income | Total Labor Income |
|------------------------------------|---------------------|-----------------------|----------------------|--------------------|
| Total, all industries | \$19,656 | \$6,255 | \$6,299 | \$32,210 |
| Food & Beverage | \$6,005 | \$133 | \$268 | \$6,405 |
| Lodging | \$5,816 | \$25 | \$30 | \$5,871 |
| Business Services | | \$2,253 | \$705 | \$2,958 |
| Air Transport | \$2,628 | \$9 | \$13 | \$2,650 |
| Other Transport | \$1,730 | \$651 | \$182 | \$2,564 |
| Finance, Insurance and Real Estate | \$389 | \$1,064 | \$1,043 | \$2,495 |
| Recreation and Entertainment | \$1,963 | \$129 | \$87 | \$2,178 |
| Education and Health Care | | \$11 | \$1,661 | \$1,672 |
| Retail Trade | \$731 | \$123 | \$786 | \$1,640 |
| Wholesale Trade | | \$445 | \$436 | \$881 |
| Communications | | \$441 | \$211 | \$653 |
| Manufacturing | | \$305 | \$264 | \$569 |
| Construction and Utilities | | \$337 | \$143 | \$480 |
| Personal Services | | \$134 | \$338 | \$472 |
| Gasoline Stations | \$395 | \$4 | \$23 | \$422 |
| Government | | \$114 | \$67 | \$181 |
| Agriculture, Fishing, Mining | | \$76 | \$44 | \$120 |

Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

FISCAL (TAX) IMPACTS

Visitor spending, visitor supported jobs, and business sales generated \$15.5 billion in government revenues.

State and local taxes alone tallied \$7.5 billion in 2021.

Each household in New York would need to be taxed an additional \$1,010 to replace the visitor-generated taxes received by New York state and local governments in 2021.

Fiscal (tax) impacts

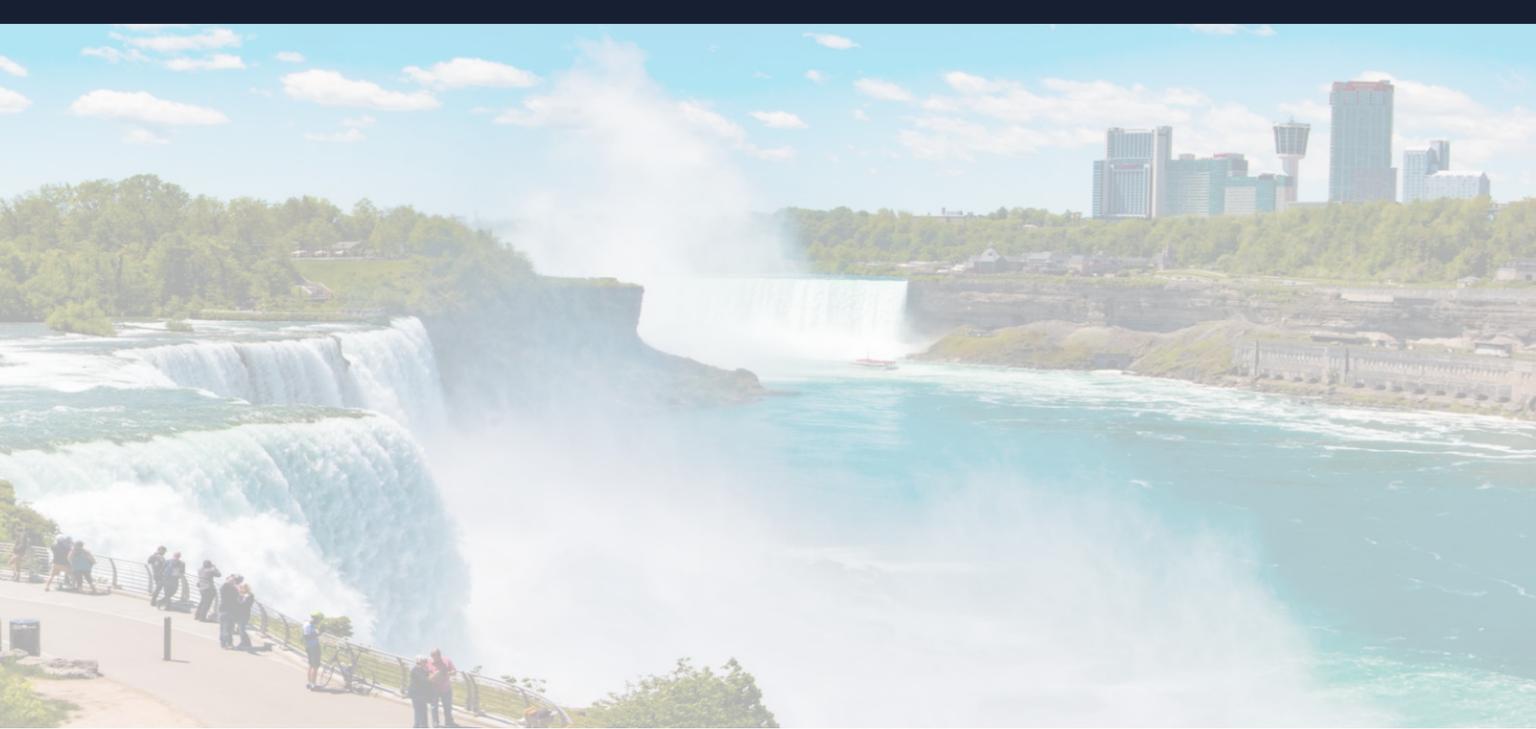
Amounts in millions of nominal dollars

| | Total |
|------------------------------|-----------------|
| Total Tax Revenues | \$15,461 |
| Federal Taxes | \$8,004 |
| Personal Income | \$2,943 |
| Corporate | \$1,236 |
| Indirect Business | \$538 |
| Social Insurance | \$3,288 |
| State and Local Taxes | \$7,457 |
| Sales | \$2,011 |
| Personal Income | \$1,272 |
| Corporate | \$1,275 |
| Social Insurance | \$119 |
| Excise and Fees | \$277 |
| Property | \$2,503 |

Source: Tourism Economics

Visitors generated \$3.0 billion in state taxes, an increase of 31% over the prior year.

Local visitor-supported taxes, sustained mainly through property taxes, registered \$4.4 billion in 2021.



Fiscal (tax) impacts

Amounts in millions of nominal dollars

| | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|---|----------------|----------------|----------------|--------------|--------------------|
| Total State & Local Tax Revenues | \$9,134 | \$5,862 | \$7,457 | 27.2% | 81.6% |
| State Taxes | \$4,036 | \$2,330 | \$3,039 | 30.5% | 75.3% |
| Personal Income | \$1,260 | \$894 | \$1,019 | 14.0% | 80.9% |
| Corporate | \$766 | \$385 | \$540 | 40.3% | 70.5% |
| Sales | \$1,641 | \$824 | \$1,193 | 44.8% | 72.7% |
| Excise and Fees | \$222 | \$123 | \$168 | 37.1% | 76.0% |
| State Unemployment | \$147 | \$104 | \$119 | 14.0% | 80.9% |
| Local Taxes | \$5,099 | \$3,532 | \$4,417 | 25.1% | 86.6% |
| Personal Income | \$313 | \$222 | \$253 | 14.0% | 80.9% |
| Corporate | \$1,044 | \$524 | \$736 | 40.3% | 70.5% |
| Sales | \$1,124 | \$565 | \$818 | 44.8% | 72.7% |
| Property | \$2,475 | \$2,142 | \$2,503 | 16.8% | 101.1% |
| Excise and Fees | \$143 | \$79 | \$108 | 37.1% | 76.0% |

Source: Tourism Economics

ECONOMIC IMPACTS JOB & LABOR INCOME IMPACTS

Direct visitor spending of \$52 billion generated tourism's total economic impact of \$85.5 billion, with associated labor income of approximately \$32.2 billion in 2021.

 **\$85.5B**
Total Economic Impact

 **\$52.0B**
Direct Visitor Spending

 **\$32.2B**
Total Labor Income Impact



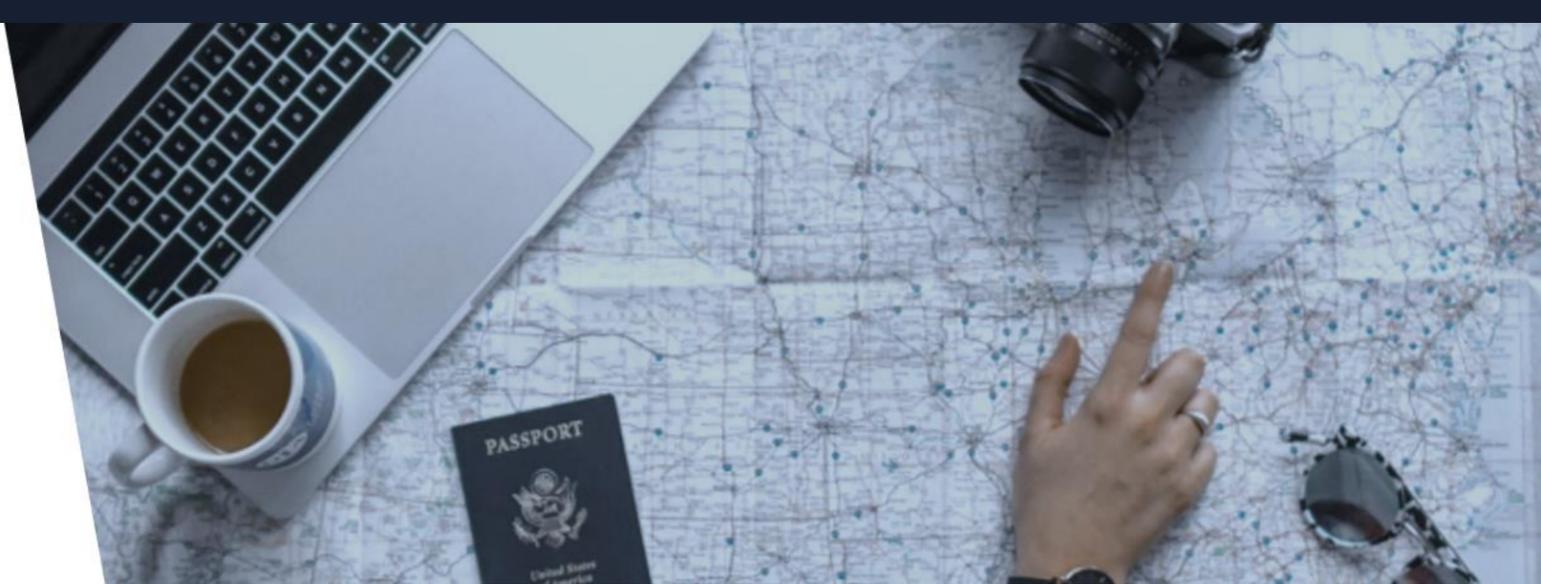
FISCAL IMPACTS TAX REVENUES

The economic impacts attributable to visitors generate significant fiscal (tax) impacts as they ripple through the regional economy. Visitor activity generated \$7.5 billion in state and local tax revenues in 2021.

 **\$7.5B**
Total State & Local Tax Revenues

 **\$2.0B**
Sales Tax Revenues

 **\$2.5B**
Property Tax Revenues



REGIONAL SUMMARY

VISITOR SPENDING BY REGION

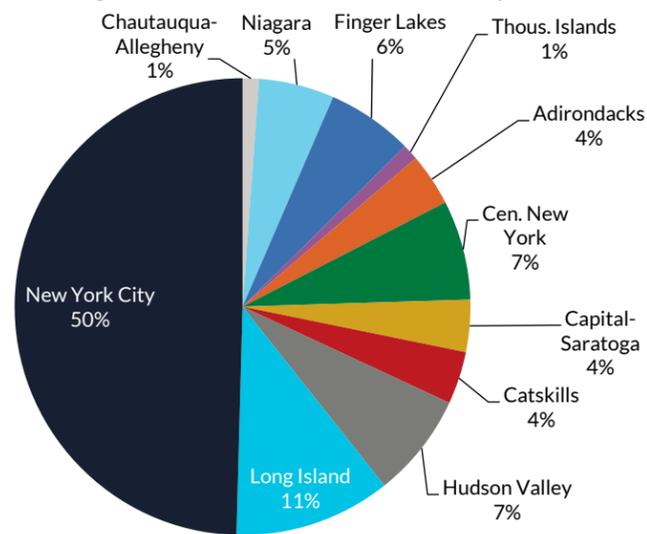
New York State is divided into 11 economic regions.

Visitor spending grew markedly in each region as travel confidence rebounded. New York City was the largest tourism region in 2021 (50% of state-wide spending), albeit a smaller contributor to overall state spending than in 2019 (65%).

The share of spending in 2021 for outdoor-friendly destinations remained elevated relative to 2019 and largely unchanged versus 2020.

Visitor Spending by Region

Percentage of New York State visitor spend



Source: Tourism Economics

Traveler spending

Amounts in millions of nominal dollars

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------------|
| Total visitor spending | \$67,633 | \$71,819 | \$73,618 | \$33,941 | \$52,049 | 53.4% | 70.7% |
| 1. Chautauqua-Allegheny | \$553 | \$589 | \$596 | \$408 | \$602 | 47.7% | 101.0% |
| 2. Greater Niagara | \$2,666 | \$2,778 | \$2,828 | \$1,593 | \$2,784 | 74.8% | 98.4% |
| 3. Finger Lakes | \$3,048 | \$3,169 | \$3,261 | \$1,963 | \$3,187 | 62.4% | 97.7% |
| 4. Thousand Islands | \$543 | \$564 | \$575 | \$424 | \$576 | 35.8% | 100.3% |
| 5. Adirondacks | \$1,422 | \$1,491 | \$1,541 | \$1,310 | \$1,936 | 47.8% | 125.6% |
| 6. Central New York | \$2,351 | \$2,473 | \$2,578 | \$2,035 | \$3,668 | 80.2% | 142.3% |
| 7. Capital-Saratoga | \$2,011 | \$2,136 | \$2,207 | \$1,250 | \$1,922 | 53.7% | 87.1% |
| 8. Catskills | \$1,319 | \$1,469 | \$1,576 | \$1,181 | \$1,937 | 64.1% | 122.9% |
| 9. Hudson Valley | \$3,664 | \$4,366 | \$4,466 | \$2,574 | \$3,848 | 49.5% | 86.2% |
| 10. Long Island | \$5,871 | \$6,135 | \$6,310 | \$3,999 | \$5,787 | 44.7% | 91.7% |
| 11. New York City | \$44,185 | \$46,650 | \$47,679 | \$17,205 | \$25,801 | 50.0% | 54.1% |

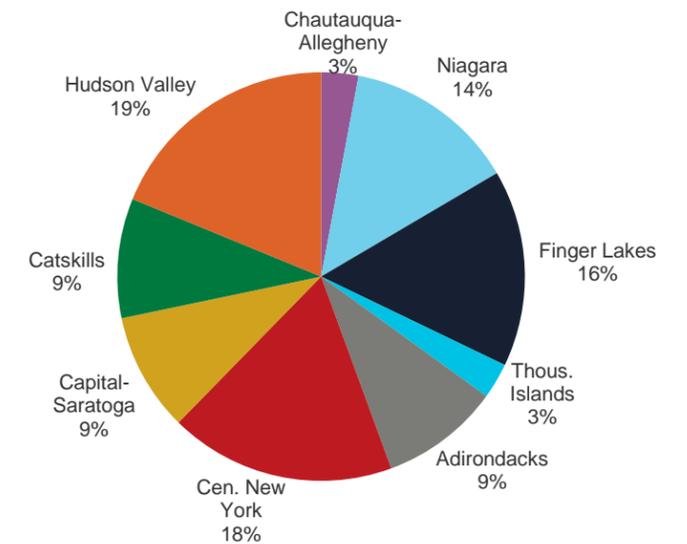
Source: Tourism Economics

Traveler 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 Hudson Valley (19%), followed by Central New York (18%) and the Finger Lakes (16%).

Upstate Visitor Spending by Region

Percentage of Upstate New York visitor spend

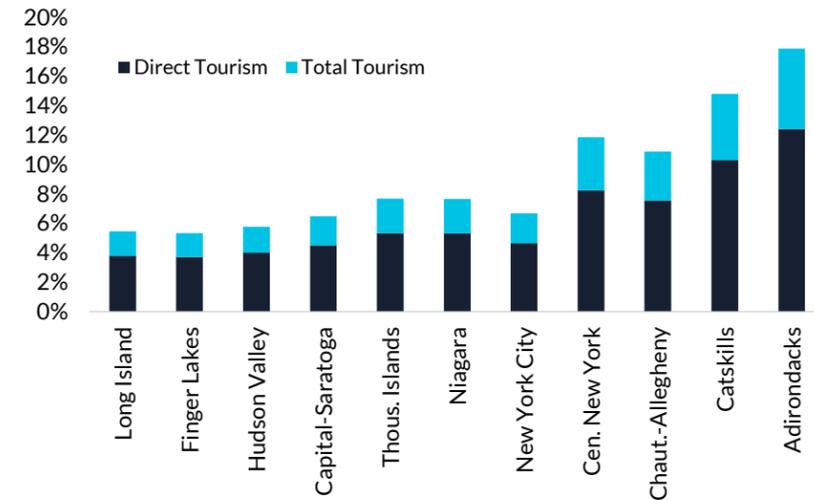


Source: Tourism Economics

RELIANCE ON TOURISM

Tourism is an integral part of each region's economy, generating from 5% to 18% of total employment. The industry is most important to the Adirondacks and Catskills, encompassing 18% and 15% of total employment, respectively. Despite the strong recovery in spending, the recovery in visitor-supported jobs has been slower as pandemic related labor force distortions continue to affect tourism-centric industries.

Tourism share of regional employment



Source: Tourism Economics

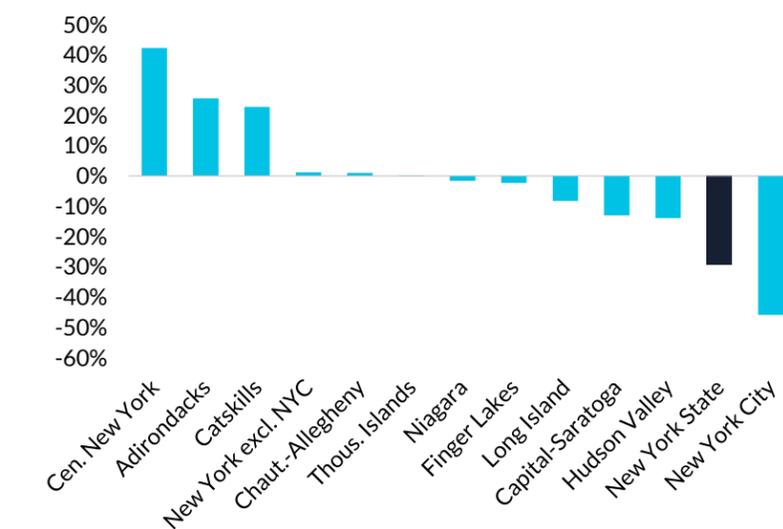
TRAVELER SPENDING GROWTH

In 2021, all regions recorded robust growth versus 2020. Increases were most significant in Central New York (80%), followed by Greater Niagara (75%).

Overall state spending versus 2019 was impacted by New York City, which remained at 54% of pre-pandemic levels. Combined, spending in remaining regions was 101% of 2019 levels. Spending in Central New York (142%), the Adirondacks (126%), and the Catskills (123%), was well above pre-pandemic levels.

Growth in traveler spending (2021)

% change versus 2019



Source: Tourism Economics

Tourism Economic Impact

Dollar amounts in millions of nominal dollars, employment in persons
Combined direct, indirect, and induced

| | Direct Sales | Labor Income | Local Taxes | State Taxes |
|-------------------------|-----------------|-----------------|----------------|----------------|
| Total | \$52,049 | \$32,210 | \$4,417 | \$3,039 |
| 1. Chautauqua-Allegheny | \$602 | \$278 | \$46 | \$35 |
| 2. Greater Niagara | \$2,784 | \$1,550 | \$187 | \$137 |
| 3. Finger Lakes | \$3,187 | \$1,546 | \$243 | \$174 |
| 4. Thousand Islands | \$576 | \$257 | \$44 | \$34 |
| 5. Adirondacks | \$1,936 | \$792 | \$131 | \$103 |
| 6. Central New York | \$3,668 | \$1,599 | \$188 | \$188 |
| 7. Capital-Saratoga | \$1,922 | \$1,062 | \$150 | \$113 |
| 8. Catskills | \$1,937 | \$745 | \$122 | \$109 |
| 9. Hudson Valley | \$3,848 | \$2,046 | \$318 | \$223 |
| 10. Long Island | \$5,787 | \$3,207 | \$453 | \$338 |
| 11. New York City | \$25,801 | \$19,128 | \$2,536 | \$1,587 |

Source: Tourism Economics

Tourism Economic Impact

Regional shares

| | Direct Sales | Labor Income | Employment | Local Taxes | State Taxes |
|-------------------------|--------------|--------------|-------------|-------------|-------------|
| Total | 100% | 100% | 100% | 100% | 100% |
| 1. Chautauqua-Allegheny | 1% | 1% | 2% | 1% | 1% |
| 2. Greater Niagara | 5% | 5% | 7% | 4% | 4% |
| 3. Finger Lakes | 6% | 5% | 8% | 6% | 6% |
| 4. Thousand Islands | 1% | 1% | 1% | 1% | 1% |
| 5. Adirondacks | 4% | 2% | 3% | 3% | 3% |
| 6. Central New York | 7% | 5% | 6% | 4% | 6% |
| 7. Capital-Saratoga | 4% | 3% | 5% | 3% | 4% |
| 8. Catskills | 4% | 2% | 3% | 3% | 4% |
| 9. Hudson Valley | 7% | 6% | 8% | 7% | 7% |
| 10. Long Island | 11% | 10% | 11% | 10% | 11% |
| 11. New York City | 50% | 59% | 46% | 57% | 52% |

Source: Tourism Economics



REGIONAL DETAIL: CATSKILLS

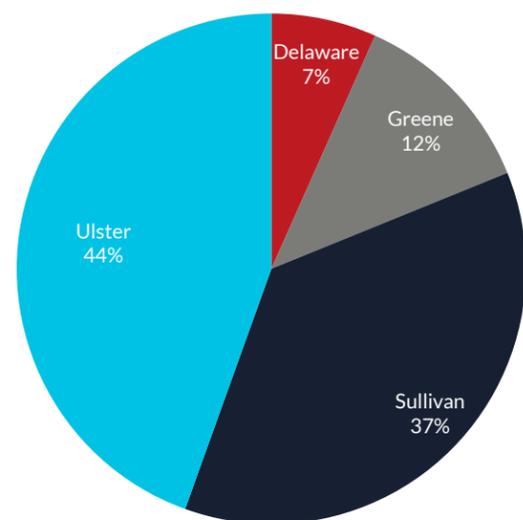
COUNTY DISTRIBUTION

In 2021, visitor spending and tourism-related employment grew to \$1.9 billion and 16,348 jobs, respectively. Visitor spending in the Catskills increased by 64% to reach 123% of 2019 levels, highlighting visitors' continued preference for outdoor and rural vacation destinations. Relative to 2019, traveler spending was up most in Ulster County at 126% of 2019 levels.

Ulster County represents 44% of the region's tourism sales, with \$862 million in direct tourism spending.

Visitor Spending by County

Percentage of visitor spend



Source: Tourism Economics

Traveler spending

Amounts in millions of nominal dollars

| | Lodging | Recreation | F&B | Retail & Svc Stations | Transport | Second Homes | Total |
|--------------|----------------|---------------|----------------|-----------------------|---------------|----------------|------------------|
| Total | \$966.8 | \$40.7 | \$281.4 | \$188.0 | \$46.5 | \$413.5 | \$1,936.9 |
| Delaware | \$19.7 | \$2.3 | \$14.1 | \$7.8 | \$0.7 | \$84.7 | \$129.3 |
| Greene | \$88.9 | \$11.2 | \$37.9 | \$22.3 | \$10.0 | \$65.8 | \$236.1 |
| Sullivan | \$369.8 | \$9.7 | \$59.6 | \$68.7 | \$2.2 | \$199.6 | \$709.6 |
| Ulster | \$488.3 | \$17.5 | \$169.9 | \$89.2 | \$33.6 | \$63.4 | \$861.9 |

Source: Tourism Economics

TRAVELER SPENDING

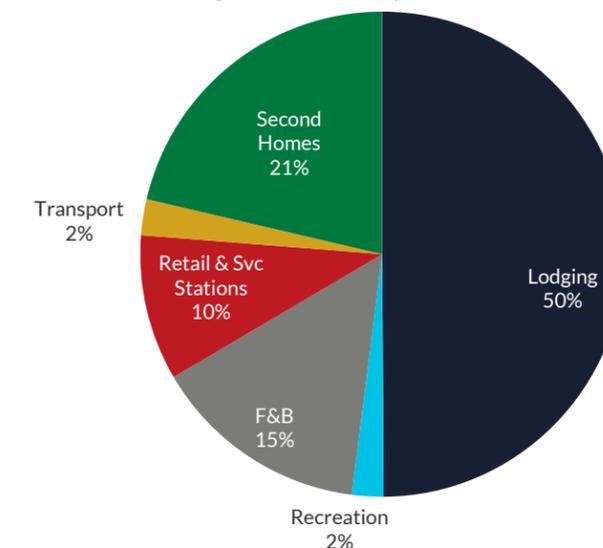
Travelers spent \$1.9 billion in the Catskills region in 2021 across a diverse range of sectors.

Spending on lodging and food & beverages comprised 50% and 15% of total, respectively.

Seasonal second homes also generated significant economic activity in the region, tallying \$414 million (21% of total spend).

Visitor Spending by Sector

Percentage of visitor spend



Source: Tourism Economics



ECONOMIC IMPACTS

Tourism Economic Impact

Dollar amounts in millions of nominal dollars, employment in persons
Combined direct, indirect, and induced

| | Direct Sales | Labor Income | Employment, Persons | Local Taxes | State Taxes |
|--------------|------------------|----------------|---------------------|----------------|----------------|
| Total | \$1,936.9 | \$745.4 | 16,348 | \$121.6 | \$108.9 |
| Delaware | \$129.3 | \$45.1 | 1,157 | \$9.5 | \$7.6 |
| Greene | \$236.1 | \$94.1 | 3,064 | \$14.9 | \$13.8 |
| Sullivan | \$709.6 | \$235.2 | 4,402 | \$43.2 | \$41.4 |
| Ulster | \$861.9 | \$371.1 | 7,726 | \$54.0 | \$46.1 |

Source: Tourism Economics

REGIONAL GROWTH

| Traveler Spend | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|--|----------------|----------------|----------------|----------------|----------------|--------------|--------------------|
| Amounts in millions of nominal dollars | | | | | | | |
| Total | \$1,319 | \$1,469 | \$1,576 | \$1,181 | \$1,937 | 64.1% | 122.9% |
| Delaware | \$112 | \$117 | \$121 | \$101 | \$129 | 27.9% | 106.6% |
| Greene | \$171 | \$185 | \$193 | \$164 | \$236 | 44.2% | 122.6% |
| Sullivan | \$450 | \$515 | \$578 | \$427 | \$710 | 66.3% | 122.8% |
| Ulster | \$587 | \$652 | \$685 | \$489 | \$862 | 76.2% | 125.9% |

| State Taxes | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|---|-----------------|-----------------|-----------------|-----------------|------------------|--------------|--------------------|
| Amounts in thousands of nominal dollars | | | | | | | |
| Total | \$72,558 | \$80,098 | \$86,420 | \$72,582 | \$108,852 | 50.0% | 126.0% |
| Delaware | \$6,154 | \$6,377 | \$6,653 | \$6,217 | \$7,551 | 21.5% | 113.5% |
| Greene | \$9,391 | \$10,093 | \$10,560 | \$10,067 | \$13,787 | 37.0% | 130.6% |
| Sullivan | \$24,732 | \$28,093 | \$31,680 | \$26,227 | \$41,435 | 58.0% | 130.8% |
| Ulster | \$32,281 | \$35,535 | \$37,527 | \$30,071 | \$46,079 | 53.2% | 122.8% |

| Local Taxes | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 Growth | % relative to 2019 |
|---|-----------------|-----------------|------------------|-----------------|------------------|--------------|--------------------|
| Amounts in thousands of nominal dollars | | | | | | | |
| Total | \$88,824 | \$96,621 | \$100,215 | \$95,276 | \$121,616 | 27.6% | 121.4% |
| Delaware | \$7,349 | \$7,560 | \$7,778 | \$7,468 | \$9,452 | 26.6% | 121.5% |
| Greene | \$11,366 | \$11,987 | \$12,265 | \$11,714 | \$14,950 | 27.6% | 121.9% |
| Sullivan | \$30,072 | \$33,843 | \$35,740 | \$33,602 | \$43,209 | 28.6% | 120.9% |
| Ulster | \$40,036 | \$43,230 | \$44,432 | \$42,493 | \$54,006 | 27.1% | 121.5% |

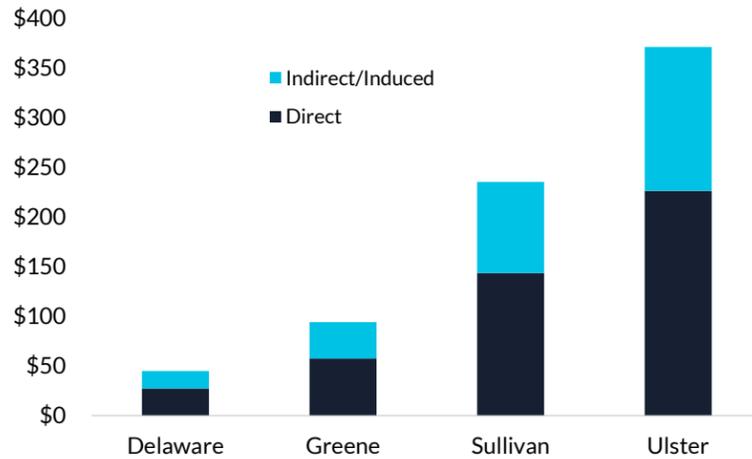
Source: Tourism Economics

LABOR INCOME

Tourism in the Catskills region generated \$455 million in direct labor income and \$745 million including indirect and induced impacts. Total labor income including indirect and induced impacts was the most significant in Ulster County at \$371 million.

Tourism-Generated Labor Income

Amounts in millions of nominal dollars



Source: Tourism Economics

Tourism-Generated Labor Income

Amounts in millions of nominal dollars

| | Direct | Total (Direct, Indir., Induced) | Share (Direct) | Share (Total) |
|--------------|----------------|---------------------------------|----------------|---------------|
| Total | \$454.9 | \$745.4 | 7.8% | 12.9% |
| Delaware | \$27.5 | \$45.1 | 3.7% | 6.0% |
| Greene | \$57.4 | \$94.1 | 7.9% | 12.9% |
| Sullivan | \$143.5 | \$235.2 | 10.3% | 16.9% |
| Ulster | \$226.5 | \$371.1 | 7.7% | 12.7% |

Source: Tourism Economics



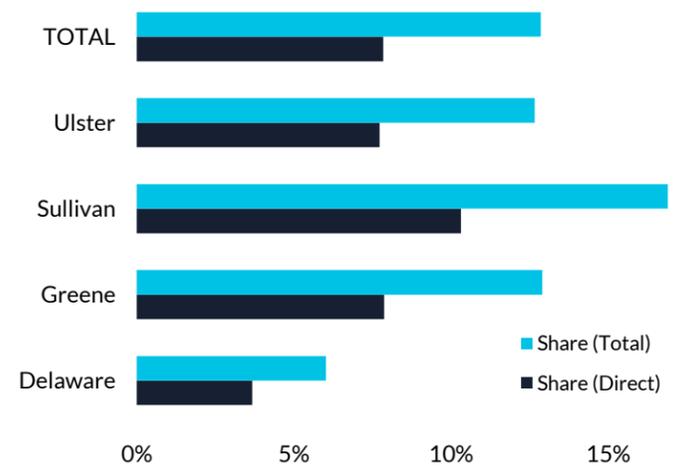
In 2021, 12.9% of all labor income in the Catskills region was generated by tourism, compared with 11.3% in 2020.

Sullivan County was the most dependent upon tourism wage income as 16.9% of all labor income in the county was generated by visitors.

Tourism in Greene County accounted for 12.9% of all labor income last year.

Tourism-Generated Labor Income

Share of economy



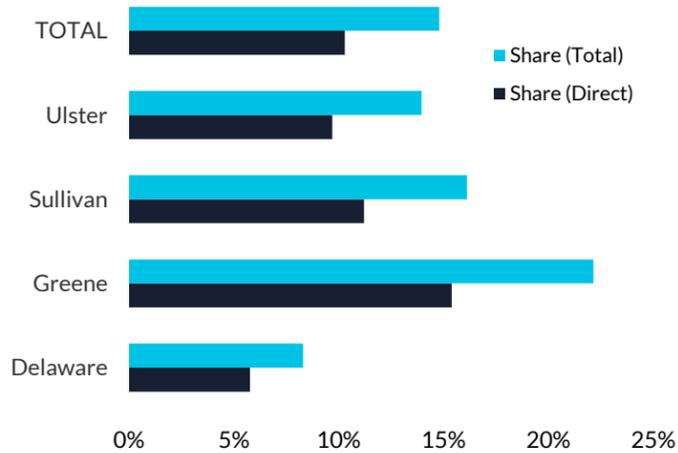
Source: Tourism Economics

TOURISM EMPLOYMENT

In 2021, total tourism-generated employment registered 16,348 jobs, 14.8% of all jobs within the region. Direct employment in tourism accounted for 10.3% of all jobs.

Tourism-Generated Employment

Share of economy



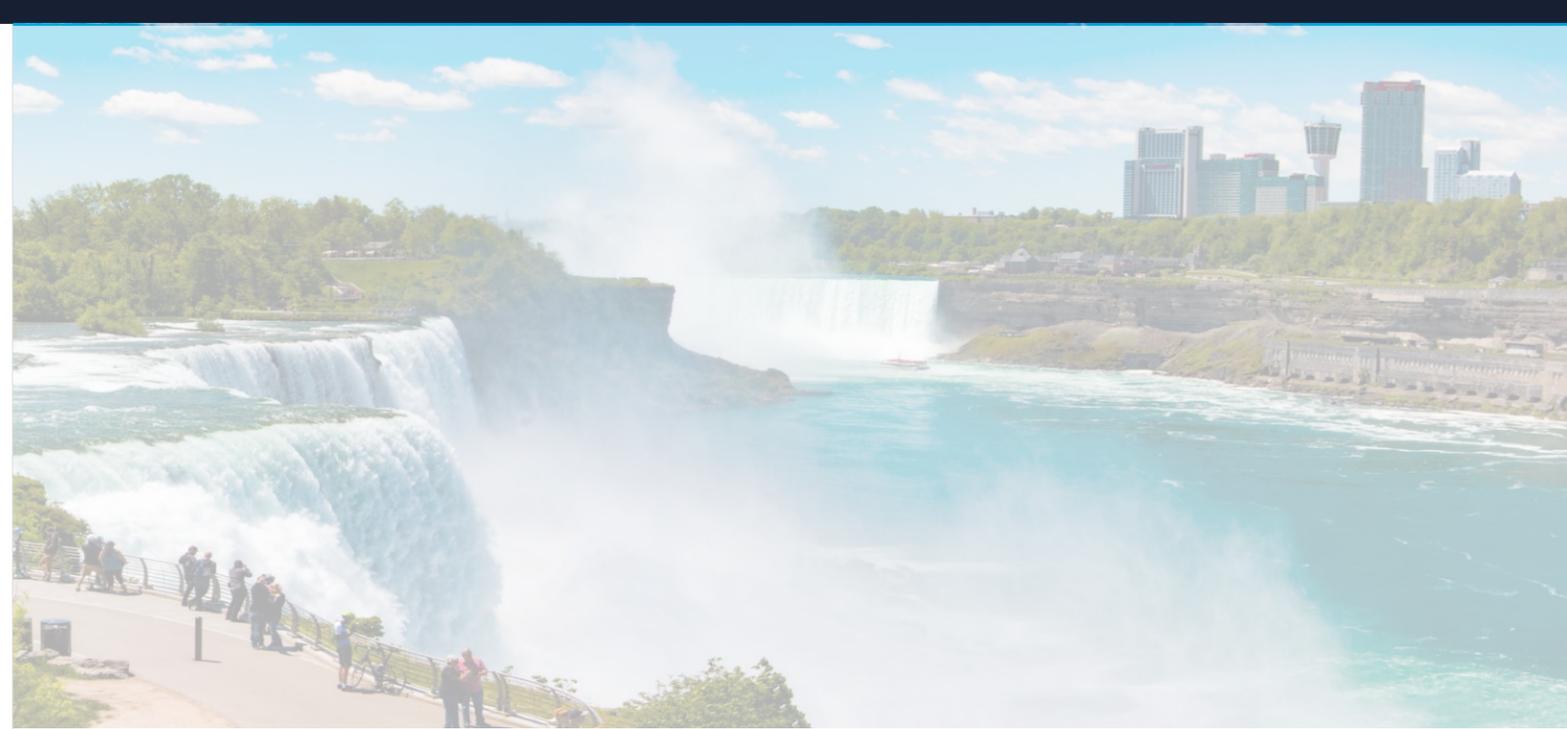
Source: Tourism Economics

Tourism-Generated Employment

Amounts in number of jobs and share of economy

| | Direct | Total (Direct, Indir., Induced) | Share (Direct) | Share (Total) |
|--------------|---------------|---------------------------------|----------------|---------------|
| Total | 11,361 | 16,348 | 10.3% | 14.8% |
| Delaware | 804 | 1,157 | 5.8% | 8.3% |
| Greene | 2,129 | 3,064 | 15.4% | 22.2% |
| Sullivan | 3,059 | 4,402 | 11.2% | 16.1% |
| Ulster | 5,369 | 7,726 | 9.7% | 14.0% |

Source: Tourism Economics

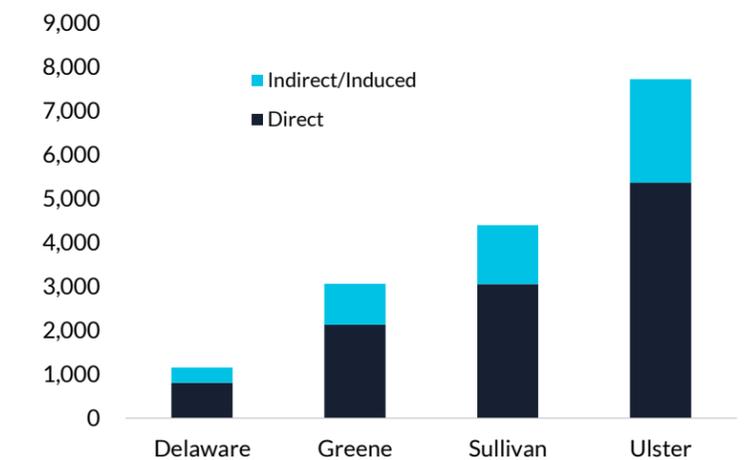


Greene County was the most dependent upon tourism employment, with 22.2% of all employment sustained by visitors.

Ulster County produced the most tourism-related jobs in the Catskills region (7,726 jobs).

Tourism-Generated Employment

Amounts in number of jobs



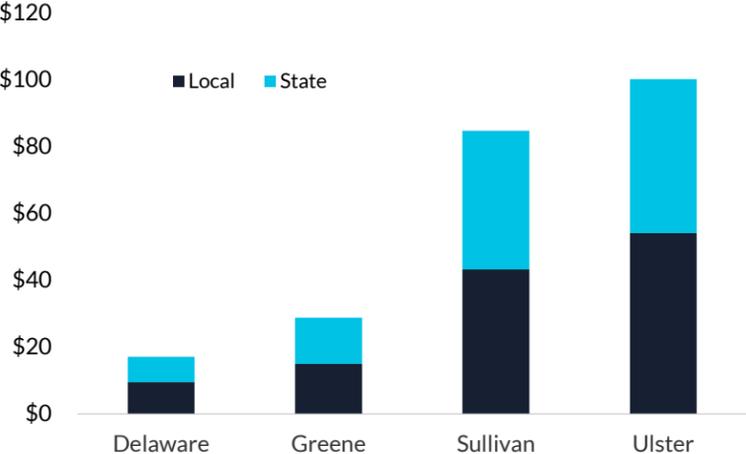
Source: Tourism Economics

TOURISM TAXES

Tourism in the Catskills generated \$230 million in state and local taxes in 2021. Sales, property, and hotel bed taxes contributed \$122 million in local taxes. Ulster County constituted 43.4% of the region’s tourism tax base.

Tourism-Generated Taxes

Amounts in millions of nominal dollars



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 \$1,701 to maintain the same level of government revenue, already hard hit by the pandemic.

Tourism-Generated Taxes

Amounts in thousands of nominal dollars

| | Local Taxes | State Taxes | Total | Regional Share | Tax Savings per Household |
|--------------|------------------|------------------|------------------|----------------|---------------------------|
| Total | \$121,616 | \$108,852 | \$230,468 | 100.0% | \$1,701 |
| Delaware | \$9,452 | \$7,551 | \$17,003 | 7.4% | \$898 |
| Greene | \$14,950 | \$13,787 | \$28,737 | 12.5% | \$1,625 |
| Sullivan | \$43,209 | \$41,435 | \$84,643 | 36.7% | \$2,943 |
| Ulster | \$54,006 | \$46,079 | \$100,085 | 43.4% | \$1,428 |

Source: Tourism Economics



APPENDIX

Glossary – Spending Definitions

| Term | Description |
|--------------------------|---|
| Lodging | Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments. |
| Food and beverage | Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers. |
| Recreation | Includes visitor spending within the arts, entertainment and recreation sub-sector. |
| Shopping | Includes visitor spending in all retail sub-sectors within the local economy. |
| Local transport | Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending. |
| Service stations | Visitor spending on gasoline. |
| Second homes | Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau. |

Glossary – Economic Impact Definitions

| Term | Description |
|--------------------------|---|
| Direct Impact | Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging). |
| Indirect Impact | Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain). |
| Induced Impact | Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending. |
| Employment | Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year. |
| Labor income | Income (wages, salaries, proprietor income and benefits) supported by visitor spending. |
| Value Added (GDP) | The economic enhancement a company gives its products or services before offering them to customers. |
| Local Taxes | City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government. |
| State Taxes | State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments. |

ABOUT TOURISM ECONOMICS

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, London, Frankfurt, Ontario, and Sydney.

Oxford Economics is 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. 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, we employ over 400 full-time staff, including 300 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

For more information:

admin@tourismeconomics.com