The Ohio Visitor Economy

Medina County 2025

June 2026

CONTENTS

Introduction

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

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

To quantify the significance of the Ohio visitor economy, to the state overall and for its counties and regions, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

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

MEDINA COUNTY
SUMMARY ECONOMIC IMPACTS

Direct visitor spending of $451 million generated tourism's total economic impact of $735 million, including 7,278 total jobs (including full-time and part-time jobs) with associated labor income of $216 million in 2025.

$735M
Total Economic Impact

$451M
Direct Visitor Spending

$216M
Total Labor Income Impact

7,278
Total Jobs Impact

FISCAL IMPACTS
TAX REVENUES

The economic impacts attributable to tourism generated significant fiscal (tax) impacts as they cycled through the county economy. Overall, tourism generated $97 million in tax revenues in 2025.

$97M
Total Tax Revenues

$48M
State & Local Tax Revenues

$21M
Local Tax Revenues

$657
Per household in tax burden relief

ECONOMIC IMPACTS

STATE OF OHIO

Ohio Key Findings in 2025

Visitors Generate Significant Economic Impact

In 2025, **244.8 million visitors spent $44.3 billion** in the Ohio economy, year-over-year increases of 1.2% and 1.4%, respectively from 2024. Visitor activity generated a total economic impact of **$72.6 billion**.

244.8M VISITORS TO OHIO

$44.3B VISITOR SPENDING

$72.6B TOTAL ECONOMIC IMPACT

$19.6B TOTAL PERSONAL INCOME

535,813 TOTAL JOBS SUPPORTED

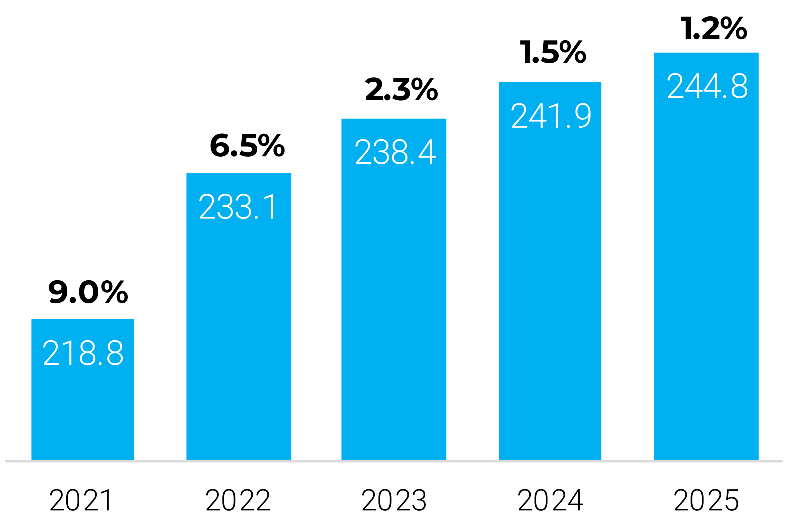
$4.8B STATE AND LOCAL TAXES

Ohio welcomed nearly **245 million** visitors who spent **$44.3 billion** in 2025.

Visitor Volume

In 2025, 244.8 million visitors traveled to Ohio, an increase of 1.2% over the prior year. Domestic volume increased 1.2%, while international arrivals, still a small share of the total, decreased 13%.

Ohio Visitor Volume
millions



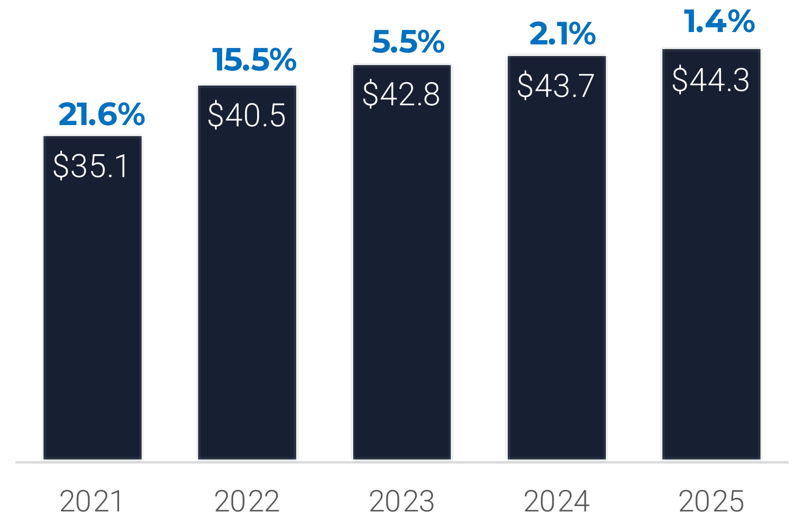
Sources: Tourism Economics, SMARI

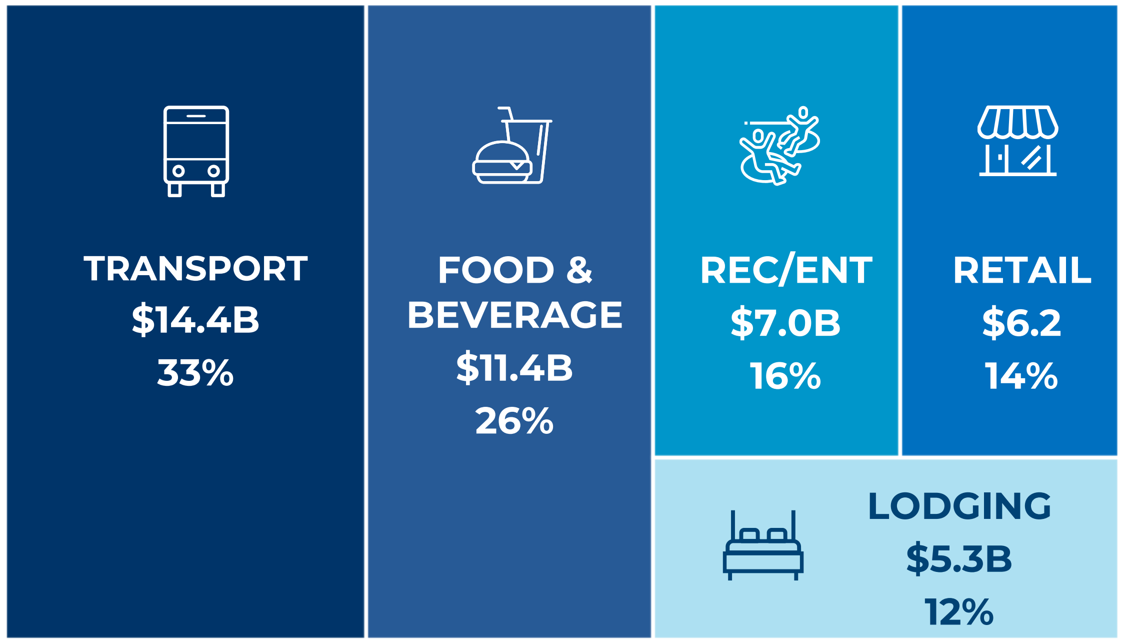
Visitor Spending

Visitor spending increased 1.4% in 2025, reaching $44.3 billion.

Of the total spent, food and beverage spending accounted for $11.4 billion, or 26% of the total. Visitors spent 16% of their budget on recreation and entertainment. Lodging spending, including hotels, short-term rentals, and the value of second homes, accounted for $5.3 billion—12% of all visitor spending.

Ohio Visitor Spending
$ billions





Sources: Tourism Economics, SMARI

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

Visitor Volume and Spending Trends

Visitor spending increased 1.4% in 2025, driven primarily by price growth across most spending categories.

Recreation spending led growth with a 4.2% change, followed by retail at 3.3%. Food and beverage spending expanded 2.8%, driven in part by prices which were about 3% higher than a year earlier. Lodging spending grew 1.9%, driven more by demand growth, as average room rates grew only 0.6% in 2025. Transportation spending contracted slightly, due in part to gasoline prices that were 7% lower in 2025 from 2024..

Ohio Visitor Spending

$ billions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	**$35.1**	**$40.5**	**$42.8**	**$43.7**	**$44.3**	**1.4%**
Transportation	$12.533	$14.406	$14.860	$14.684	$14.406	-1.9%
Food & beverage	$8.489	$9.688	$10.539	$11.047	$11.359	2.8%
Recreation	$4.937	$6.038	$6.557	$6.740	$7.022	4.2%
Retail	$5.278	$5.676	$5.855	$6.017	$6.218	3.3%
Lodging	$3.884	$4.739	$4.986	$5.209	$5.307	1.9%

Sources: Tourism Economics, SMARI

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

Ohio Visitor Volume and Spending, By Market

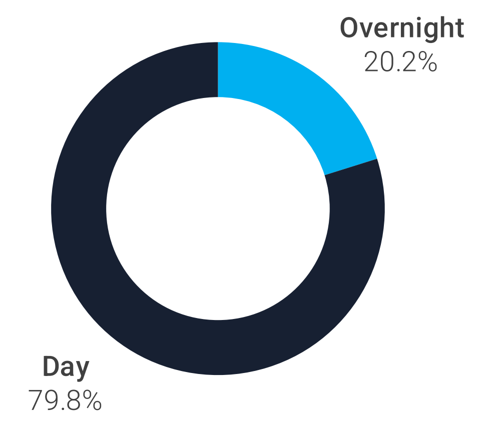
millions, $ billions, $ per person

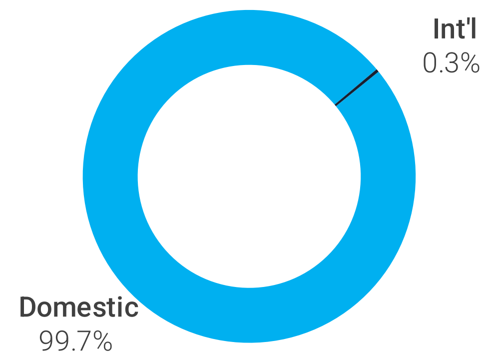
	2021	2022	2023	2024	2025	2025 Growth
Total visitors	**218.8**	**233.1**	**238.4**	**241.9**	**244.8**	**1.2%**
Day	175.6	185.6	190.3	193.4	195.5	1.1%
Overnight	43.3	47.5	48.1	48.5	49.3	1.7%
Total visitor spending	**$35.121**	**$40.548**	**$42.798**	**$43.696**	**$44.312**	1.4%
Day	$20.124	$22.434	$23.551	$23.898	$24.145	1.0%
Overnight	$14.997	$18.114	$19.246	$19.798	$20.167	1.9%
Per visitor spending	**$160**	**$174**	**$180**	**$181**	**$181**	0.2%
Day	$115	$121	$124	$124	$124	0.0%
Overnight	$347	$382	$400	$408	$409	0.2%

Sources: Tourism Economics, SMARI

Ohio Visitor Volume, By Market and Segment (2025)

Share of total visitor volume





Sources: Tourism Economics, SMARI

Business Sales Impacts

Visitors spent $44.3 billion in Ohio in 2025. These direct impacts generated an additional $28.3 billion through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached $72.6 billion in 2025.

$44.3B Visitor Spending *(Direct Sales)* **+** **$13.4B** Indirect Sales **+** **$14.9B** Induced Sales **=** **$72.6B** Total Economic Impact

Business Sales by Industry (2025)

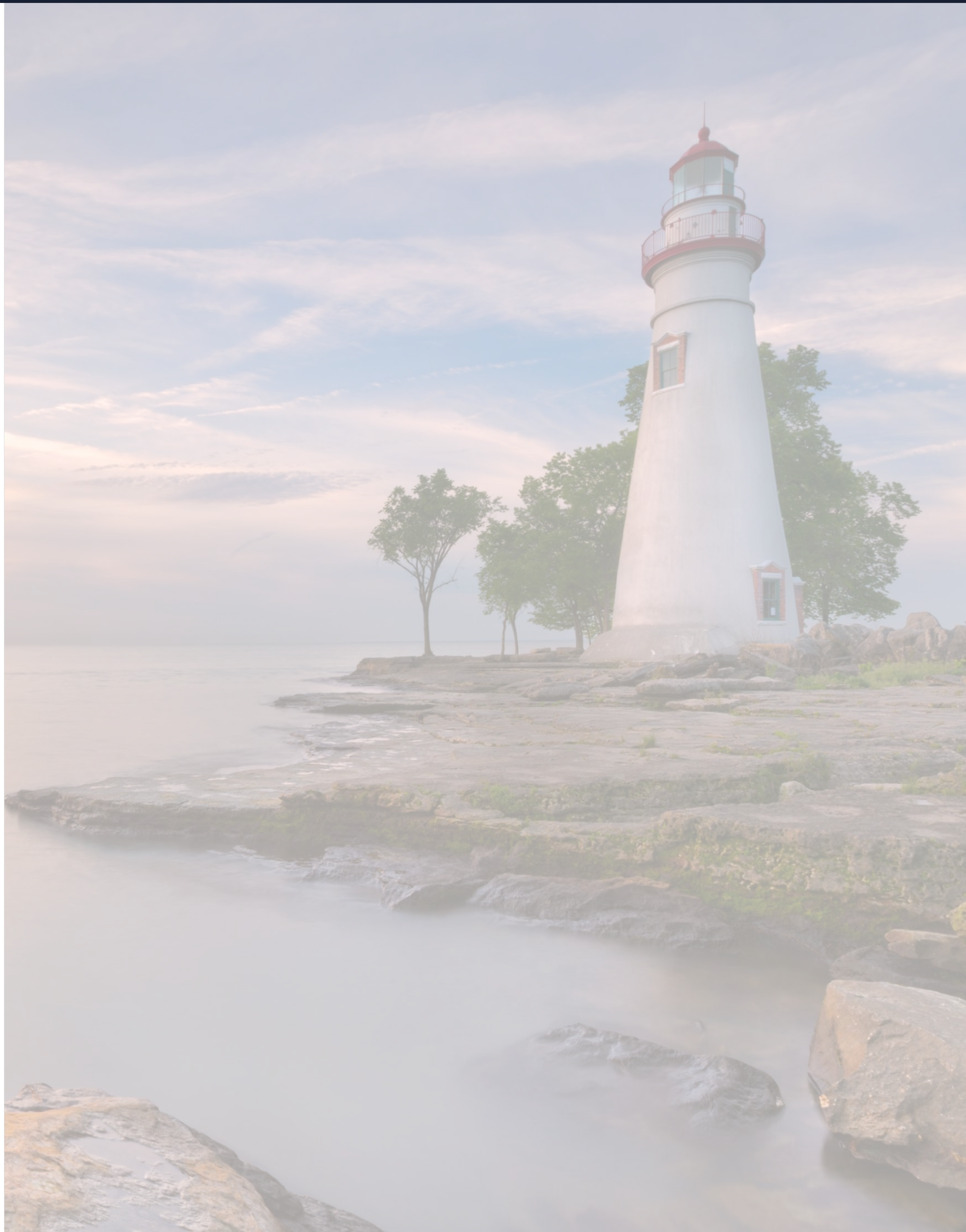
$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$44,312**	**$13,400**	**$14,914**	**$72,626**
Retail Trade	$8,830	$202	$1,233	$10,266
Food & Beverage	$8,746	$441	$1,010	$10,197
Finance, Insurance, and Real Estate	$2,328	$3,125	$4,112	$9,566
Gasoline	$8,802	$23	$91	$8,916
Recreation and Ent.	$6,320	$353	$275	$6,949
Other Transport	$3,385	$1,443	$464	$5,292
Business Services		$3,299	$1,330	$4,630
Lodging	$4,333	$2	$6	$4,341
Education and Health Care		$40	$2,743	$2,783
Personal Services	$702	$525	$864	$2,091
Manufacturing		$954	$633	$1,586
Construction and Utilities		$1,051	$487	$1,538
Wholesale Trade		$693	$801	$1,495
Communications		$870	$557	$1,427
Air Transport	$864	$48	$67	$979
Government		$206	$150	$356
Agriculture, Fishing, Mining		$125	$91	$216

Source: Tourism Economics

ECONOMIC IMPACTS

Ohio Regional Summary



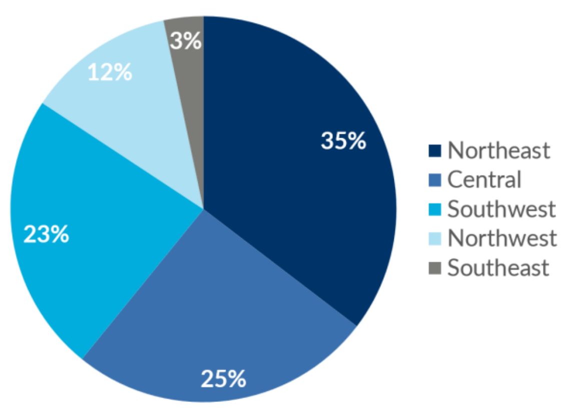
ECONOMIC IMPACTS

Ohio Regional Summary

Cleveland (Northeast), Columbus (Central), and Cincinnati (Southwest), are key destinations and influence the distribution of the tourism economy across Ohio.

Ohio tourism business sales by region (2025)

% of total



Ohio tourism business sales by region (2025)

Amounts in $billions

	Direct Sales	Total Sales
Total	$ 44.31	$ 72.63
Region		
Northeast	$ 15.79	$ 25.70
Central	$ 11.11	$ 18.49
Southwest	$ 10.44	$ 17.02
Northwest	$ 5.51	$ 9.00
Southeast	$ 1.46	$ 2.42

Source: Tourism Economics

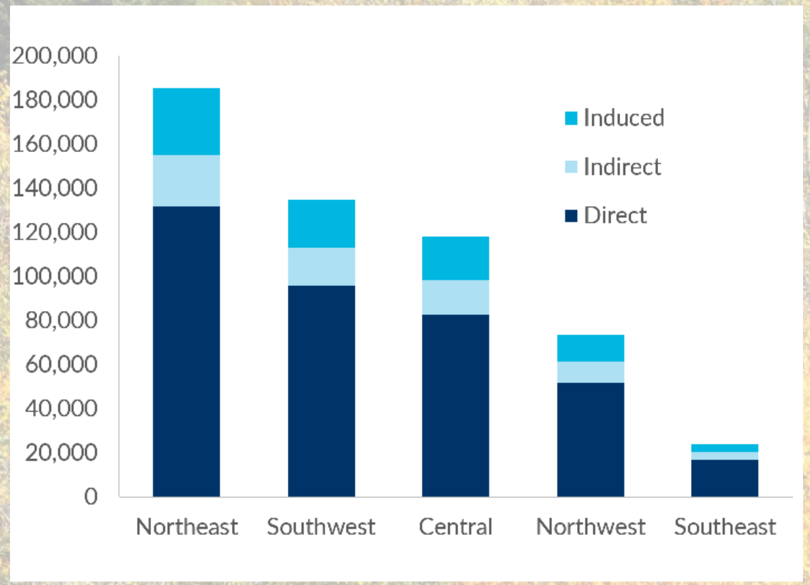
Ohio tourism business sales trends by region

Amounts in $billions, growth in annual % change

	2021	2022	2023	2024	2025
Ohio total	$ 35.12	$ 40.55	$ 42.80	$ 43.70	$ 44.31
Levels, $bils					
Northeast	$ 12.65	$ 14.61	$ 15.31	$ 15.62	$ 15.79
Central	$ 8.41	$ 10.01	$ 10.46	$ 10.88	$ 11.11
Southwest	$ 8.16	$ 9.38	$ 10.11	$ 10.21	$ 10.44
Northwest	$ 4.65	$ 5.16	$ 5.47	$ 5.55	$ 5.51
Southeast	$ 1.26	$ 1.38	$ 1.45	$ 1.42	$ 1.46
Ohio total, % change		15.5%	5.5%	2.1%	1.4%
Northeast		15.6%	4.8%	2.0%	1.0%
Central		19.0%	4.5%	4.1%	2.1%
Southwest		15.0%	7.8%	1.0%	2.2%
Northwest		11.0%	6.0%	1.4%	-0.8%
Southeast		9.6%	4.8%	-1.7%	2.8%

Ohio tourism jobs by region (2025)

Amounts in number of jobs



ECONOMIC IMPACTS

Northeast Region

ECONOMIC IMPACTS
Northeast Region

Visitor spending in Northeast Ohio generated $25.7 billion in total sales, 185,490 jobs, nearly $7.1 billion in income, and $3.4 billion in tax revenues.

Northeast region tourism impacts (2025)

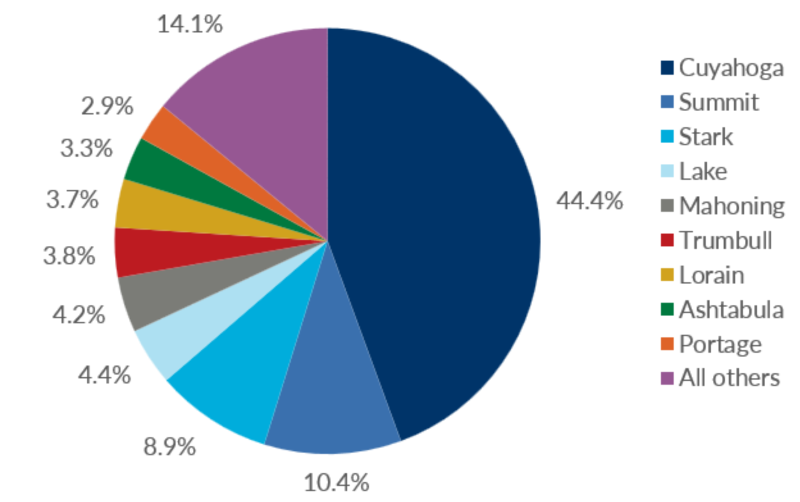
	Total Sales $mils	Total Jobs	Total Income $mils	Total Tax Revenue $mils
Region total	$25,700.7	185,490	$7,069.9	$3,388.7
County				
Ashland	$273.4	1,984	$56.1	$34.4
Ashtabula	$851.9	4,211	$105.7	$102.4
Carroll	$98.2	724	$21.7	$12.3
Columbiana	$316.5	2,717	$65.8	$39.3
Coshocton	$68.7	775	$18.1	$8.8
Cuyahoga	$11,411.4	70,407	$3,821.2	$1,565.8
Geauga	$258.8	2,925	$78.0	$33.8
Harrison	$20.8	244	$3.6	$2.4
Holmes	$320.0	2,225	$59.1	$41.1
Jefferson	$206.0	2,177	$61.3	$26.9
Lake	$1,124.2	9,346	$275.9	$145.1
Lorain	$950.5	10,574	$279.3	$125.8
Mahoning	$1,078.1	9,949	$256.6	$139.7
Medina	$735.2	7,278	$215.7	$96.7
Portage	$744.4	5,006	$146.0	$92.8
Richland	$463.6	5,296	$127.8	$60.8
Stark	$2,279.0	14,263	$404.7	$282.5
Summit	$2,675.1	21,095	$720.3	$350.5
Trumbull	$970.2	7,764	$180.6	$120.6
Tuscarawas	$503.1	3,407	$86.3	$62.1
Wayne	$351.5	3,121	$86.2	$45.0

Source: Tourism Economics

Ohio tourism business sales by county (2025)

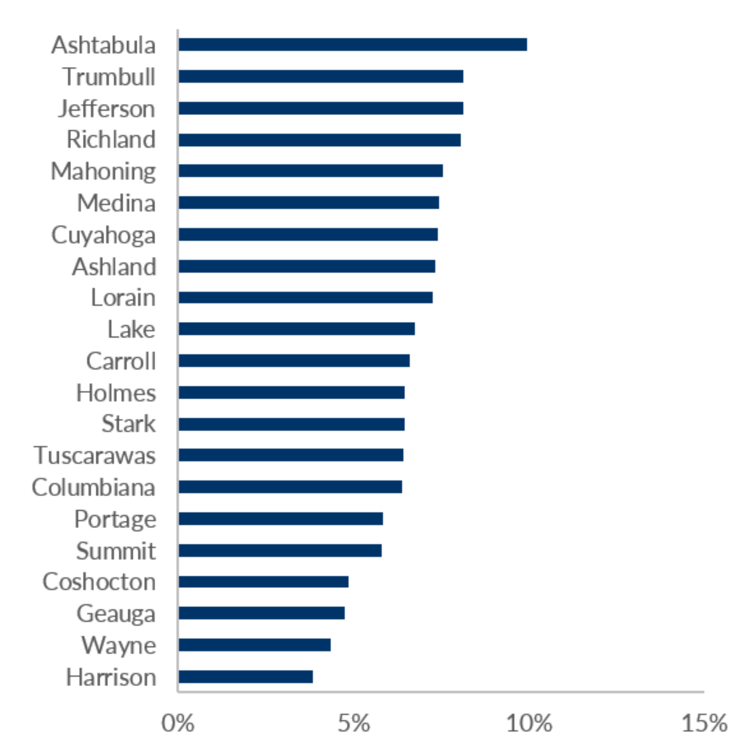
Amounts in $millions

	Direct Sales $mils	Total Sales $mils
Region total	$15,786.2	$25,700.7
County		
Cuyahoga	$7,021.8	$11,411.4
Summit	$1,645.3	$2,675.1
Stark	$1,401.2	$2,279.0
Lake	$690.5	$1,124.2
Mahoning	$662.2	$1,078.1
Trumbull	$595.2	$970.2
Lorain	$583.3	$950.5
Ashtabula	$522.9	$851.9
Portage	$456.9	$744.4
All others	$2,206.9	$3,615.7

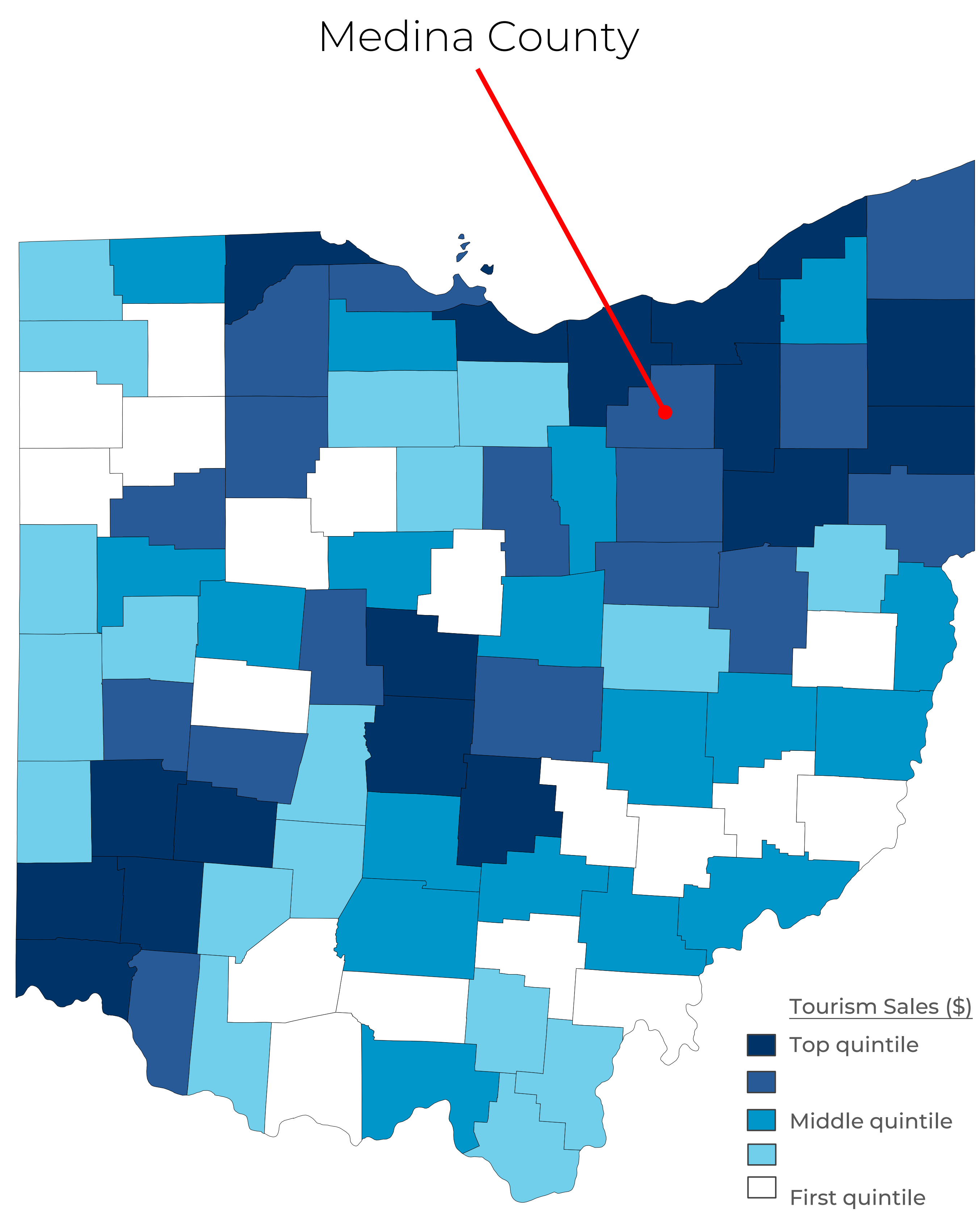


Ohio tourism job intensity by county (2025)

Share of total jobs, %



ECONOMIC IMPACTS
Medina County Tables



Medina County

Business Sales Impacts

Visitors contributed a direct impact of **$451.1 million** in 2025 in Medina County, which included spending by day and overnight visitors.

This direct spending generated **$735.2 million** in total impact, including indirect and induced impacts.

Tourism business trends

Recent Trends in Tourism Sales (Output)			
	2023	2024	2025
Medina County direct sales trends:			
Sales volume ($mils)	442.3	452.2	451.1
Sales growth, % change	3.4%	2.2%	-0.2%
Wider region and state direct sales trends:			
Northeast Ohio sales growth, % change	4.8%	2.0%	1.0%
Ohio sales growth, % change	5.5%	2.1%	1.4%

Business sales impacts by industry (2025)

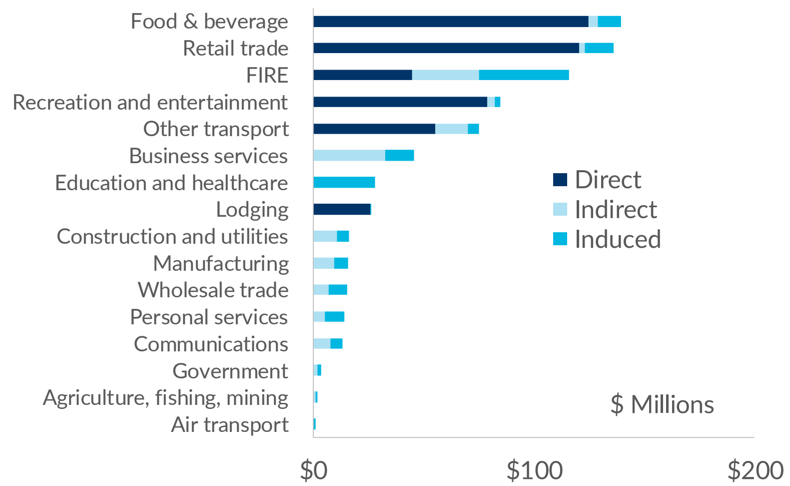
millions of nominal dollars

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	**$ 451.1**	**$ 134.1**	**$ 150.0**	**$ 735.2**
Food & beverage	$ 124.8	$ 4.4	$ 10.5	$ 139.6
Retail trade	$ 120.8	$ 2.5	$ 13.0	$ 136.3
FIRE	$ 44.8	$ 30.6	$ 40.8	$ 116.2
Recreation and entertainment	$ 79.0	$ 3.3	$ 2.8	$ 85.1
Other transport	$ 55.4	$ 14.9	$ 4.8	$ 75.1
Business services	$ -	$ 32.8	$ 13.2	$ 46.0
Education and healthcare	$ -	$ 0.4	$ 27.8	$ 28.2
Lodging	$ 26.2	$ 0.0	$ 0.1	$ 26.3
Construction and utilities	$ -	$ 11.1	$ 5.1	$ 16.2
Manufacturing	$ -	$ 9.7	$ 6.5	$ 16.2
Wholesale trade	$ -	$ 7.1	$ 8.3	$ 15.4
Personal services	$ -	$ 5.3	$ 8.8	$ 14.1
Communications	$ -	$ 8.1	$ 5.4	$ 13.4
Government	$ -	$ 2.1	$ 1.5	$ 3.6
Agriculture, fishing, mining	$ -	$ 1.3	$ 0.9	$ 2.2
Air transport	$ 0.1	$ 0.5	$ 0.6	$ 1.1

Source: Tourism Economics

Tourism business sales impacts by industry (2025)

millions of nominal dollars



Source: Tourism Economics

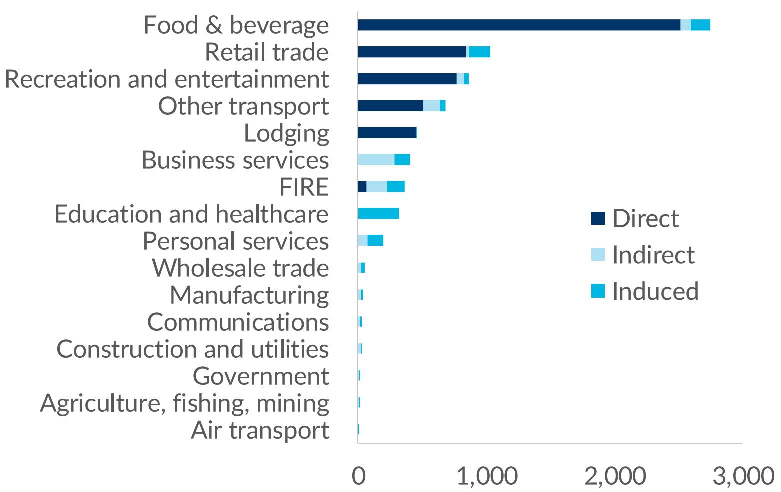
Job Impacts

Visitor activity sustained **5,164 direct** jobs and an additional **2,115 indirect and induced jobs** in Medina County.

The **total 7,278 jobs** in the County supported by visitor spending accounts for **7.5%** of all jobs in the county.

Tourism Job Impacts by industry (2025)

thousands of full-time and part-time jobs



Source: Tourism Economics

Summary Job impacts by industry (2025)

full-time and part-time jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	**5,164**	**918**	**1,197**	**7,278**
Food & beverage	2,520	74	157	2,751
Retail trade	844	19	168	1,031
Recreation and entertainment	773	54	40	867
Other transport	507	131	47	685
Lodging	454	0	1	455
Business services	-	285	124	409
FIRE	65	164	133	362
Education and healthcare	-	6	317	323
Personal services	-	75	125	200
Wholesale trade	-	26	28	54
Manufacturing	-	22	14	36
Communications	-	19	15	34
Construction and utilities	-	22	11	34
Government	-	12	7	19
Agriculture, fishing, mining	-	7	7	14
Air transport	-	2	2	4

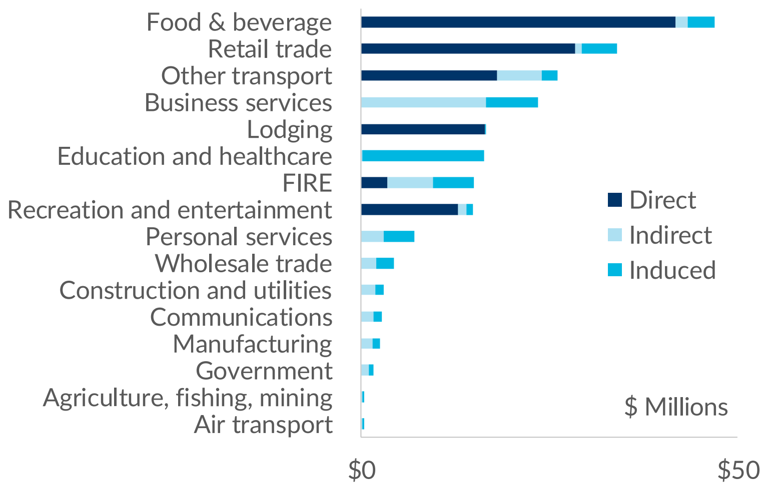
Source: Tourism Economics

Personal Income Impacts

Visitor activity generated **$121.3 million** in direct household income and a total of **$215.7 million** including indirect and induced impacts.

Tourism labor income Impacts by Industry (2025)

millions of nominal dollars



Source: Tourism Economics

Summary labor income impacts (2025)

millions of nominal dollars

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	**$ 121.32**	**$ 43.92**	**$ 50.44**	**$ 215.68**
Food & beverage	$ 41.81	$ 1.60	$ 3.54	$ 46.95
Retail trade	$ 28.53	$ 0.79	$ 4.70	$ 34.03
Other transport	$ 18.06	$ 6.01	$ 2.09	$ 26.15
Business services	$ -	$ 16.60	$ 6.93	$ 23.53
Lodging	$ 16.48	$ 0.01	$ 0.01	$ 16.50
Education and healthcare	$ -	$ 0.19	$ 16.15	$ 16.34
FIRE	$ 3.50	$ 6.06	$ 5.46	$ 15.02
Recreation and entertainment	$ 12.94	$ 1.09	$ 0.87	$ 14.89
Personal services	$ -	$ 3.03	$ 4.12	$ 7.16
Wholesale trade	$ -	$ 2.08	$ 2.35	$ 4.42
Construction and utilities	$ -	$ 1.93	$ 1.13	$ 3.06
Communications	$ -	$ 1.62	$ 1.16	$ 2.78
Manufacturing	$ -	$ 1.53	$ 0.95	$ 2.48
Government	$ -	$ 1.02	$ 0.62	$ 1.64
Agriculture, fishing, mining	$ -	$ 0.18	$ 0.18	$ 0.36
Air transport	$ -	$ 0.19	$ 0.18	$ 0.36

Source: Tourism Economics

Fiscal (Tax) Impacts

Visitor spending, visitor supported jobs, and business sales generated **$96.7 million** in government revenues.

State and local taxes alone tallied **$48 million** in Medina County in 2025.

Each household in the county would need to be taxed an additional **$657** to replace the visitor-generated taxes received by state and local governments in 2025.

Fiscal (tax) impacts
millions of nominal dollars

	Total Taxes
Total tax revenues	**$96.7**
Federal Taxes	$48.7
State Taxes	$27.5
Local Taxes	$20.5
State/Local Tax Savings Per Household	$657

Source: Tourism Economics

Appendix

Methodology Overview

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

The study area is defined as the state of Ohio and each county analysis covers the specific county of interest. Stet level estimates are shared down to the counties and then controlled to the state total.

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

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

The complete set of data inputs is provided below.

Data Sources

- **SMARI Insights:** Consumer survey data, including spending by category and visitor profile characteristics
- **STR:** Lodging performance data, including hotel room demand and revenue
- **Ohio Department of Taxation:** Lodging and sales tax receipts, by industry
- **U.S. BEA/BLS**: Employment and wage data, by industry
- **U.S. Census:** Business sales and employment by industry, and seasonal second homes inventory
- **Tourism Economics:** International arrivals data for visitors to Ohio

Glossary

SPENDING DEFINITIONS	LODGING	*All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.*
	FOOD & BEVERAGE	*Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.*
	RECREATION	*Includes visitors spending within the arts, entertainment and recreation sector.*
	RETAIL	*Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.*
	LOCAL TRANSPORT	*Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.*
	AIR TRANSPORT	*Where applicable, the local share of air transportation spending.*
	SECOND HOMES	*Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.*
ECONOMIC IMPACT DEFINITIONS	DIRECT IMPACT	*Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).*
	INDIRECT IMPACT	*Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).*
	INDUCED IMPACT	*Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.*
	EMPLOYMENT	*Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.*
	PERSONAL INCOME	*Income (wages, salaries, proprietor income and benefits) supported by visitor spending.*
	VALUE ADDED (GDP)	*Business sales net of intermediate (supply chain) purchases.*
	LOCAL TAXES	*City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.*
	STATE TAXES	*State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.*

Economic Impact Concepts

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

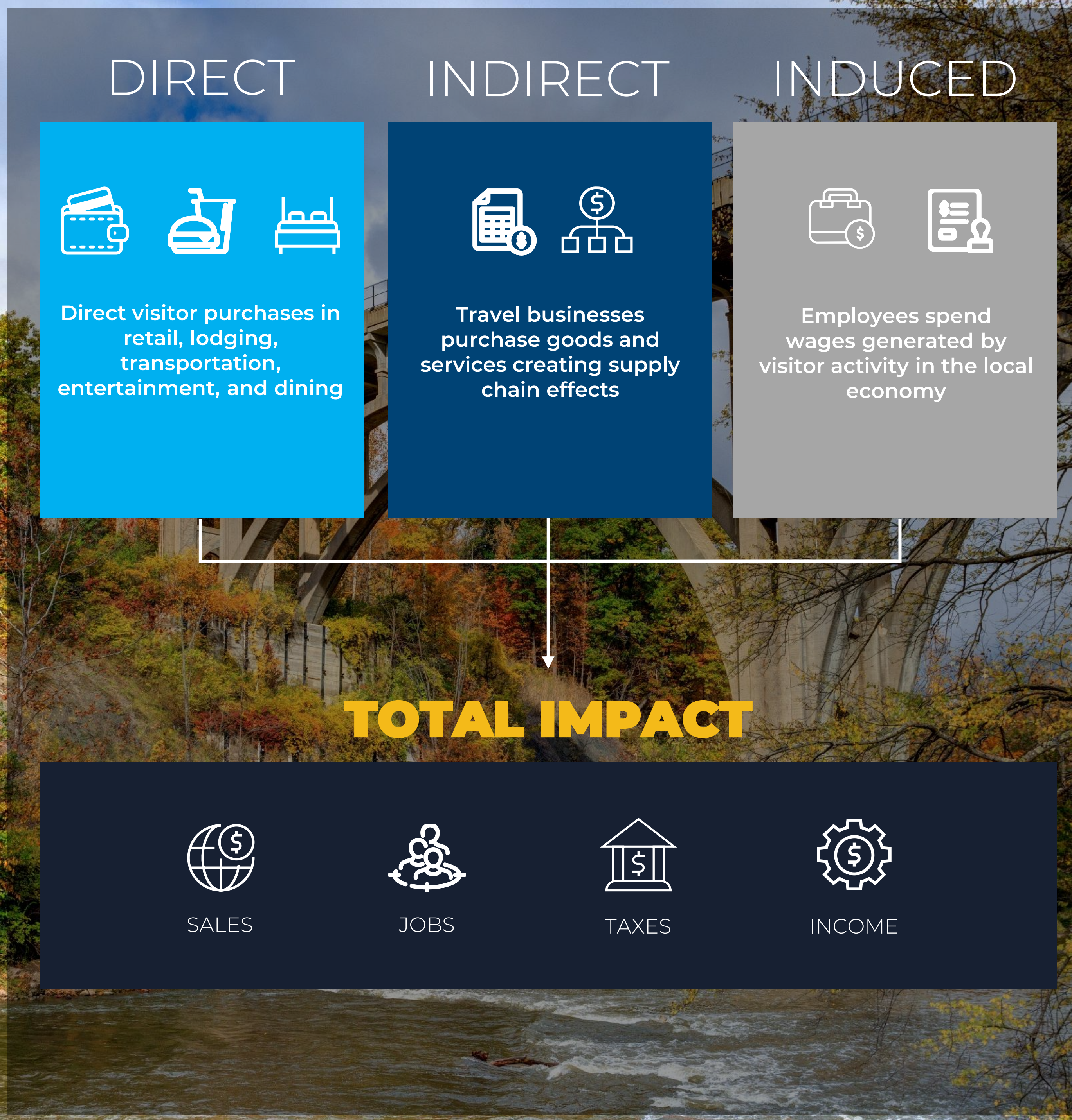
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitor through the local economy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

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

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

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

Economic Impact Model



About the Research Team

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

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

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