



NOVEMBER 2025

NEW YORK STATE'S AGRICULTURAL COUNTY FAIRS

ECONOMIC & FISCAL IMPACT

PREPARED FOR:

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AGRICULTURAL FAIRS ACROSS NEW YORK'S 50 COUNTIES.

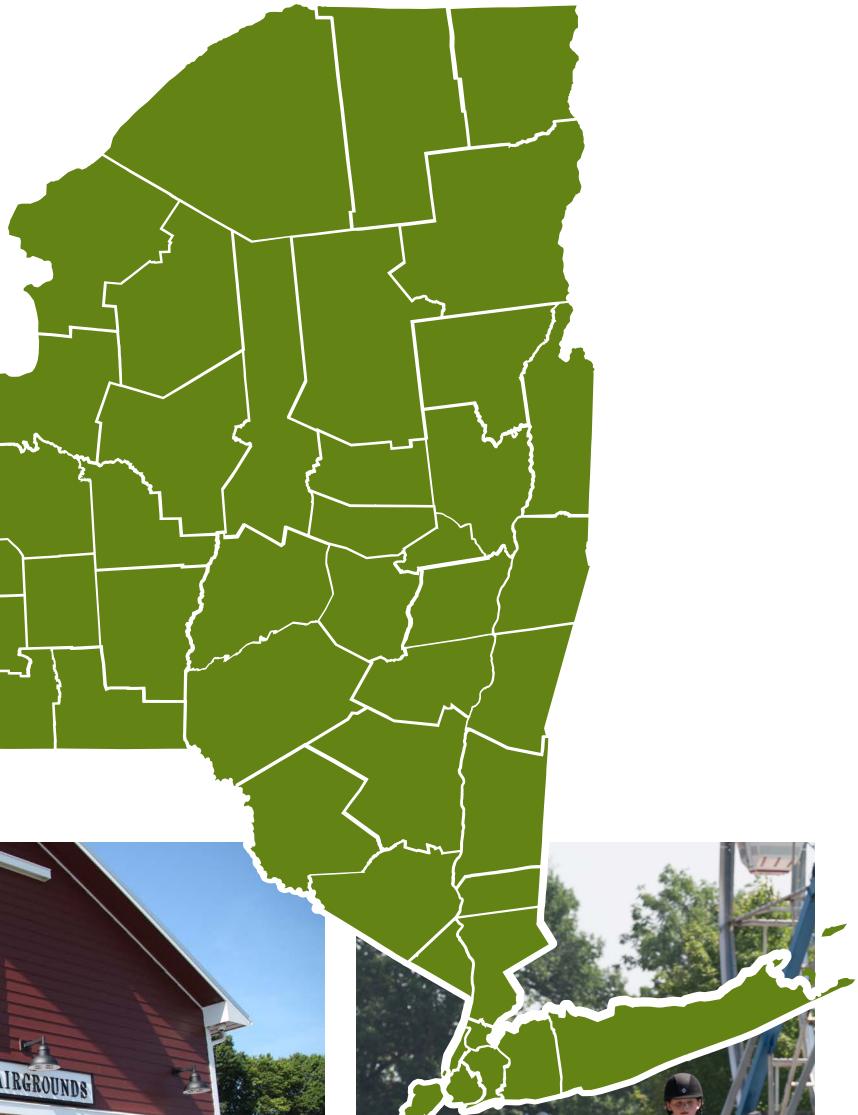


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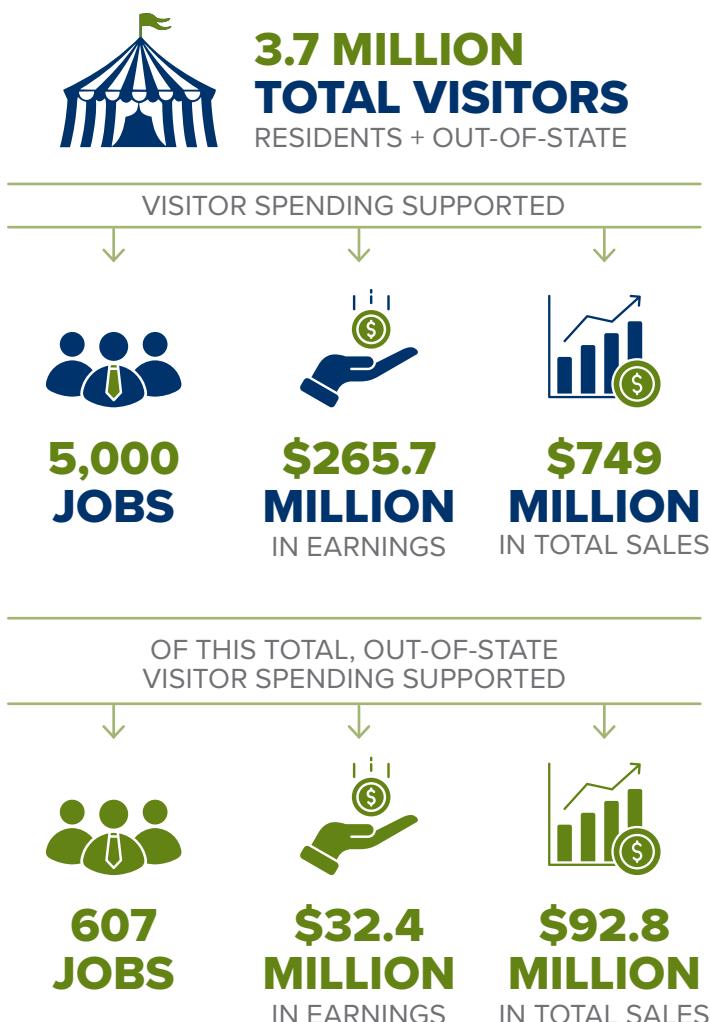
EXECUTIVE SUMMARY

New York State's network of agricultural county fairs represents a vital cultural and economic asset that supports thousands of jobs, generates millions in household income, and contributes significantly to local and state tax bases. Beyond their traditions of agriculture, education, and community, county fairs and their fairgrounds sustain year-round economic activity through fair-week operations, off-season events, and related enterprises such as carnivals and vendors.

STATEWIDE ECONOMIC IMPACT

In 2024, New York's county fairgrounds collectively welcomed an estimated **3.7 million visitors**, including both resident and out-of-state attendees drawn to fair-week activities and off-season events. Together, their spending generated significant economic activity across the state. **Visitor spending**—on admissions, food and beverages, retail purchases, lodging, and transportation—supported approximately **5,000 jobs**, **\$265.7 million in labor income**, and **\$749.0 million in total sales** across industries such as hospitality, entertainment, and retail.

Of this total, out-of-state visitors accounted for **new economic activity** flowing into New York. The spending that they brought to the state in 2024 supported an estimated **607 jobs**, **\$32.4 million in earnings**, and **\$92.8 million in sales**, reflecting the fairs' vital role as tourism generators that expand local economies beyond their immediate regions.



CARNIVAL CONTRIBUTIONS

Carnival operators and vendors associated with county fairs further enhance economic output. In 2024, carnival operations supported an estimated **126 jobs**, **\$7.2 million in earnings**, and **\$20.0 million in total sales**. These activities represent an important segment of the fairs' broader economic ecosystem, generating temporary employment and spending across multiple counties.



FISCAL IMPACTS

The fiscal benefits of county fairs extend to both state and local governments through sales tax revenue. Total taxable spending linked to fairs and fairground operations generated an estimated **\$31.2 million in new sales tax revenue** in 2024. Of this total, **\$15.6 million** was retained by counties.





INTRODUCTION

To understand the influence county fairgrounds have on the New York State economy, the New York State Association of Agricultural Fairs (NYSAAF) retained Camoin Associates to provide an economic and fiscal contribution analysis.

A NOTE ON IMPACT ANALYSIS AND CONTRIBUTION ANALYSIS

An impact analysis for New York's county fairs measures the *incremental* or *additional* economic activity that occurs because of the fairs — that is, the new spending, jobs, and tax revenues that would *not exist* in the region without the fairs. It isolates the fairs' direct, indirect, and induced effects to quantify their role in generating new economic value. In contrast, a contribution analysis captures the fairs' *ongoing economic footprint* — the total level of activity they support within the regional economy, regardless of whether it is new or existing. While impact analysis focuses on change (what's added), contribution analysis focuses on presence (what's sustained). In practical terms, impact analysis answers "What new activity happens because the fairs exist?" whereas contribution analysis answers "How much of the current economy depends on the fairs' continued operation?" The following report outlines the impact of New York County Fairs as well as the total contribution of the fairs. By including both impact and contribution numbers, we provide a more complete picture of the county fairs' role in the economy.

ABOUT THE STUDY

Three primary data sources were used to inform this study.¹

- 1) The 2024 Local Fairs Report: This report is produced by the New York Department of Agriculture and Markets, which was provided by NYSAAF. This report contains details for all 50 county fairs, including attendance, admissions status (free or paid), exhibitors and vendors, fair finances, and more.

2) 2025 Survey of Fair Administrators: This survey was created and distributed by Camoin Associates with the assistance of NYSAAF. It aimed to gather information from those who run county fairs, including data about total attendance and visitor types, operational spending, off-season events, visitation, and more. This data helped form the basis of assumptions for both the total cumulative impacts of county fairs as well as key assumptions for each of the five highlighted individual fair impact analyses. In total, data for 11 out of a total of 50 fairs were collected through this survey, including the five highlighted individual fairs.

3) 2025 Survey of Carnival Operators: Camoin Associates created and distributed this survey with the assistance of NYSAAF. It collected information about the carnivals that operate at New York's county fairs, including the fairs they operate at, their employment and payroll, spending patterns, and other qualitative information. Two carnival operators participated in this survey, which covered data for 13 county fairs.

Additionally, the 2024 Economic Impact and Benefits of Pennsylvania's Agricultural Fair Industry report further informed information related to attendee spending at local fairgrounds.

STUDY OVERVIEW

Data Source	Geography
New York Department of Agriculture and Markets	New York
Survey of New York County Fair Administrators	Study Period
	2024
	Modeling Tool
	Lightcast

¹ Due to differences in data availability and updates to impact analysis best practices, the methodology used in this report differs from that applied in a similar study completed in 2019.

METHODOLOGY

For this analysis, the economic impacts and contributions are measured by the number of jobs created, sales generated, and wages earned within the state as a result of events at the fairgrounds. Lightcast designed the input-output model used in this analysis. The model allows the analyst to input the amount of direct economic activity occurring within the state and uses the direct inputs to estimate the spillover effects that the net new spending has as these new dollars circulate through the economy. This is captured in the indirect impacts and is commonly referred to as the “multiplier effect.” See Appendix A: What is an Economic Impact Analysis? for more information on economic impact analysis.

The evaluation of fiscal impacts is limited to assessing impacts to sales tax revenue generated by the direct spending at county fairs, as well as the spending by employees whose wages are supported by the county fairs.

KEY DEFINITIONS

Job

A “job” is equal to one person employed for some amount of time (part-time, full-time, or temporary) during the study period.

Earnings

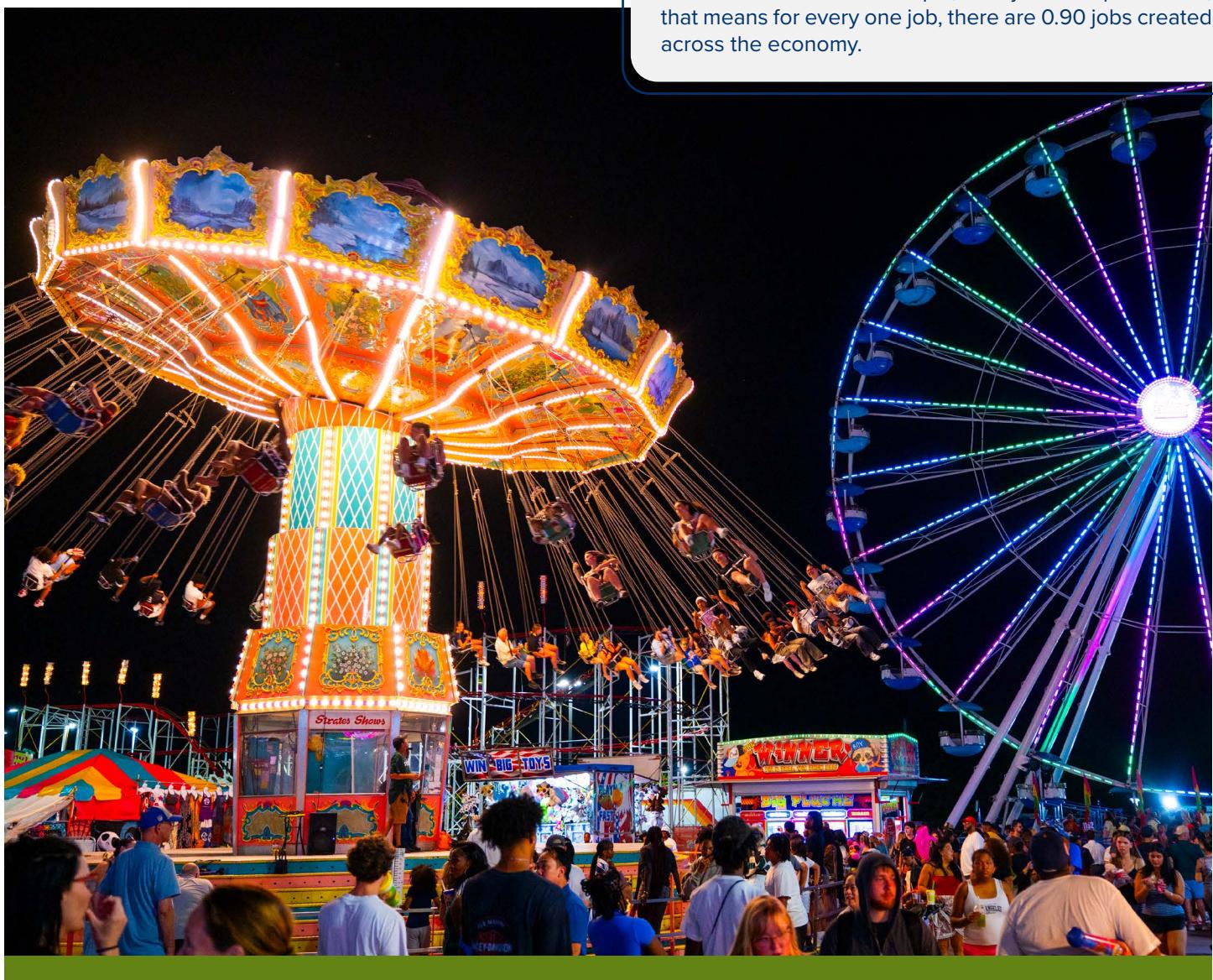
Earnings refers to the total wages, salaries, supplements, and proprietor income generated by an industry within a given region.

Sales

Industry sales are the total annual sales (gross receipts) to other industries as intermediate inputs and to consumers as final demand.

Multiplier

A multiplier is equivalent to the additional change given a one-unit increase. For example, if the jobs multiplier is 1.90, that means for every one job, there are 0.90 jobs created across the economy.



VISITORS & VISITOR SPENDING

COUNTY FAIR VISITORS

The first step to understanding the economic impact stemming from visitor spending is to identify the total attendance at the fairs as well as the number of attendees that are residents versus non-residents. To create the most accurate analysis possible, the share of resident vs. non-resident attendees is calculated for each fair based on the size of the fair: Small (fewer than 10,000 fair attendees), Medium (between 10,000 and 50,000 fair attendees), and Large (more than 50,000 fair attendees).

The total combined attendance across all fairs is derived from the 2024 Local Fairs Report. Meanwhile, the share of resident vs. non-resident attendees is derived from the Survey of Fair Administrators. The table below details these calculations. For the cumulative impact of all county fairs, non-residents are considered to be those from outside the state of New York.

COUNTY FAIRGROUNDS SPOTLIGHT

The Steuben County Fair in Bath dates back to 1819, making it one of the oldest continuously occurring fair in the state and the nation.

Table 1

2024 Attendance at New York County Fairs, by Size of Fair			
Fair Size	Combined Attendance	% of Out of NY	# of Out of NY
Small (<10,000 attendees)	37,385	5%	1,869
Medium (10,000 to 50,000 attendees)	595,948	7%	41,716
Large (>50,000 attendees)	2,298,644	10%	239,663
All NY County Fairs	2,931,977	10%	283,248

Note: Data was not available for medium-sized fairs. 7% inferred based on data provided by small and large fairs.

Source: NY Department of Agriculture and Markets 2024 Local Fairs Report, Survey of Fair Administrators, Camoin Associates.

VISITORS TO OFF-SEASON EVENTS

In addition to visitors at the county fairs, county fairgrounds often host off-season events such as concerts, craft shows, trade shows, and private events, among others. The number of off-season visitors is estimated using responses from the Survey of Fair Administrators. To estimate total off-season visitation, a factor was generated for each of the fair sizes. That factor was then applied to total attendance by fair size to get the number of off-season attendees by fair size. Finally, these totals were summed to get the total off-season visitor estimate. Notably, this off-season visitation carries a slightly higher share of attendees coming from outside each county and the state. Additionally, please note that while some fairgrounds in the small fair category may host off-season events, all survey respondents for fairs of this size indicated that they do not host such activities.

The total off-season attendance at all county fairs, as well as their resident vs. non-resident attendance, is provided in Table 2.

Table 2

Estimated Visitation at Off-Season Events			
Fair Size	Combined Attendance	Visitation Ratio	Estimated Off-Season Event Attendance
Small (<10,000 attendees)	37,385	0.00	0
Medium (10,000 to 50,000 attendees)	595,948	0.10	62,078
Large (>50,000 attendees)	2,298,644	0.29	670,748
Total Off-Season Attendance			732,826
% from Outside New York			16%
Est. Resident Attendance			117,252
Est. Non-Resident Attendance			615,574

Source: Survey of Fair Administrators, Camoin Associates



VISITOR SPENDING AT COUNTY FAIRS

These visitors all contribute to the county and state economies when they spend money, both at the fair and off-site. To estimate this spending, average spending baskets are applied to resident and non-resident visitors. These spending baskets are based on the spending baskets found in the 2024 Economic Impact and Benefits of Pennsylvania's Agricultural Fair Industry, which provided a similar analysis of county agricultural fairs in neighboring Pennsylvania for 2024², along with data from the Survey of Fair Administrators. These spending baskets were then adapted to better align with New York's county fairs based on input from the project team. For example, the fair admissions spending was adjusted to reflect the average admissions paid to enter fairs using data about admissions from the 2024 Local Fairs Report³.

Resident and non-resident spending patterns are identical except for fair admissions (see footnote 2) and lodging spending. Note that these spending amounts reflect the average across all visitors; it is likely that many visitors spend \$0 in some categories, which is why averages may seem low. This spending basket reflects spending for the duration of a fair, rather than a per-day estimate.

Table 3

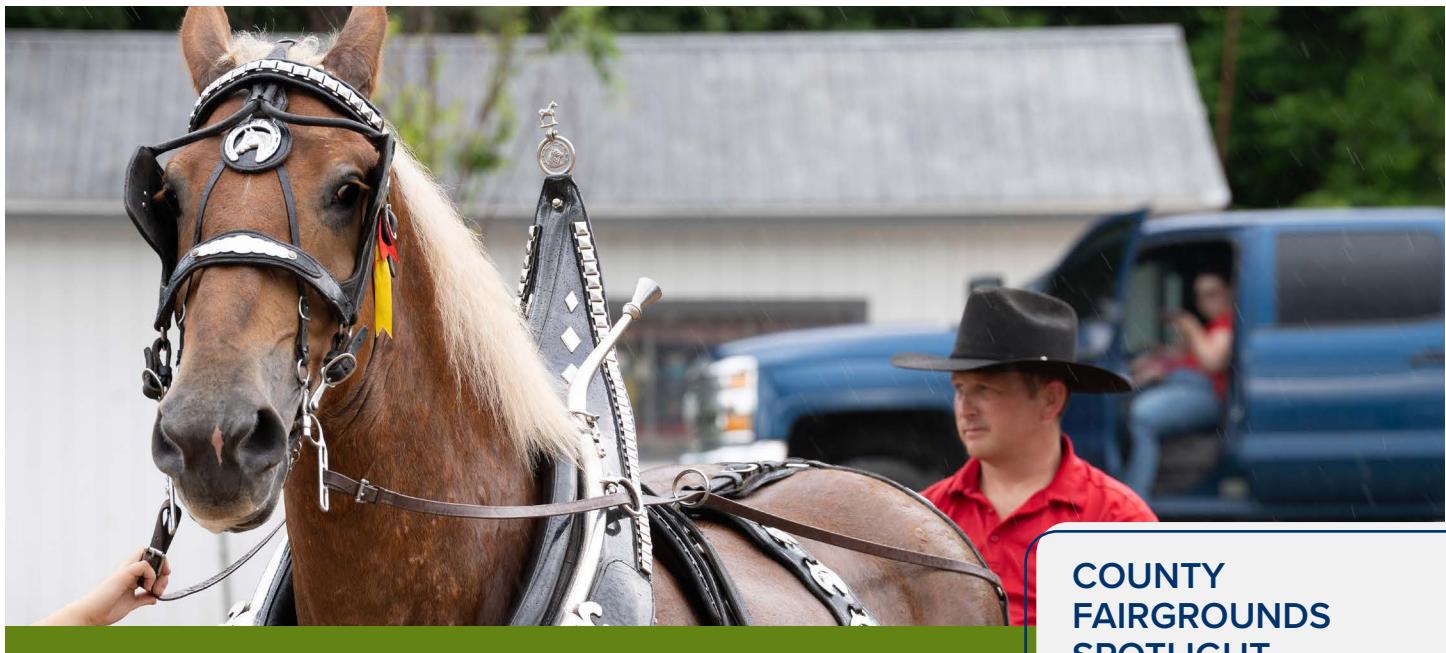
Spending Generated by Fair Attendees at All NY County Fairs, 2024

	Per-Visit Spending		Total Spending		Total Spending
	NY Residents 90%	Non-Residents 10%	NY Residents 90%	Non-Residents 10%	
Fair Admissions	\$4.79	\$8.08	\$12,631,079	\$2,369,473	\$15,000,552
Parking	\$7.00	\$7.00	\$18,471,455	\$2,052,384	\$20,523,839
Food & Beverages	\$40.00	\$40.00	\$105,551,172	\$11,727,908	\$117,279,080
Fair Purchases	\$7.00	\$7.00	\$18,471,455	\$2,052,384	\$20,523,839
Transportation & Travel	\$9.50	\$9.50	\$25,068,403	\$2,785,378	\$27,853,782
Shopping	\$8.50	\$8.50	\$22,429,624	\$2,492,180	\$24,921,805
Other Attractions	\$8.00	\$8.00	\$21,110,234	\$2,345,582	\$23,455,816
Lodging & Accommodations	\$--	\$12.00	\$--	\$3,518,372	\$3,518,372
Rides	\$6.00	\$6.00	\$15,832,676	\$1,759,186	\$17,591,862
Entertainment (concerts, games)	\$4.50	\$4.50	\$11,874,507	\$1,319,390	\$13,193,897
Other	\$4.50	\$4.50	\$11,874,507	\$1,319,390	\$13,193,897
Total	\$100	\$115	\$263,315,112	\$33,741,627	\$297,056,739

Source: Econsult Solutions, Inc. *Economic Impact and Benefits of Pennsylvania's Agricultural Fair Industry (2024)*; Camoin Associates; New York Department of Agriculture and Markets

²From "Pennsylvania County and Local Agricultural Fairs: The Economic Impact and Benefits of Pennsylvania's Agricultural Fair Industry," prepared by Econsult Solutions, Inc., 2024, Pennsylvania Department of Agriculture.

³Some fairs have both free and paid admissions. For this analysis, it is assumed that admissions fee waivers are allocated to residents, while non-residents pay for all admissions. For this reason, the average fair admission spending is lower for residents than for non-residents. Estimates for fair average admissions were generated using data about paid and free admissions, as well as admissions revenue, from the 2024 Local Fairs Report.



VISITOR SPENDING AT OFF-SEASON EVENTS

Spending baskets are also assigned to visitors of off-season events. This spending basket is identical to that of fair attendees, except that it excludes all explicitly fair-related spending, specifically fair admissions, fair purchases, and spending on rides. Additionally, it accounts for a higher share of non-resident attendees of off-season events (16%) compared to fairs (10%)⁴. This spending is detailed in the Table 4 below.

COUNTY FAIRGROUNDS SPOTLIGHT

Erie County Fairgrounds in Hamburg, NY hosted 250 days of off-season events in 2024. These events included horse shows, agricultural shows, artisan markets, festivals, and more, drawing approximately 500,000 visitors throughout the year.

Table 4

	Spending Generated by Off-Season Attendees at All NY County Fairgrounds, 2024				
	Per-Visit Spending		Total Spending		
	NY Residents 84%	Non-Residents 16%	NY Residents 84%	Non-Residents 16%	Total Spending
Parking	\$7.00	\$7.00	\$4,309,015	\$820,765	\$5,129,779
Food and Beverages	\$40.00	\$40.00	\$24,622,941	\$4,690,084	\$29,313,026
Transportation and Travel	\$9.50	\$9.50	\$5,847,949	\$1,113,895	\$6,961,844
Shopping	\$8.50	\$8.50	\$5,232,375	\$996,643	\$6,229,018
Other Attractions	\$8.00	\$8.00	\$4,924,588	\$938,017	\$5,862,605
Lodging and Accommodations	\$-	\$12.00	\$-	\$1,407,025	\$1,407,025
Entertainment (concerts, games)	\$4.50	\$4.50	\$2,770,081	\$527,634	\$3,297,715
Other	\$4.50	\$4.50	\$2,770,081	\$527,634	\$3,297,715
Total	\$82.00	\$94.00	\$50,477,030	\$11,021,697	\$61,489,728

Source: Econsult Solutions, Inc. *Economic Impact and Benefits of Pennsylvania's Agricultural Fair Industry (2024)*; Camoin Associates

⁴ The higher percentage of out-of-state visitors at non-fair events likely reflects the specialized nature of these gatherings. Events such as concerts, horse shows, and festivals likely attract dedicated enthusiasts from a broader geographic area who are willing to travel for a unique offering. County fairs, by contrast, tend to be more community-focused and primarily attract more local visitors.



IMPACT AND CONTRIBUTION OF VISITOR SPENDING

Impact and Contribution of Spending at New York County Fairs

Using the visitation figures and spending baskets outlined above, we assume that around **2.9 million attendees spent approximately \$297 million while attending New York's county fairs in 2024**. This is referred to as “direct” spending and was used as the direct input into Lightcast’s economic impact model.

The economic contribution measures the overall scale of fair-related activity—both by in-state and out-of-state visitors—as part of the broader New York economy. Rather than isolating new spending, contribution analysis quantifies the total employment, earnings, and sales sustained by ongoing operations. Altogether, all visitor spending related to county fairs supported an estimated **4,159 jobs, \$220.2 million in labor income, and \$621.0 million in total sales in 2024**, including an estimated 147 jobs directly employed at New York’s county fair associations and organizers.

The economic impact captures the new dollars brought into the state from visitors who reside elsewhere. Because these funds would not otherwise circulate in the local economy, they represent net new economic activity. In **2024, out-of-state visitors to New York’s county fairs brought in an estimated \$33.7 million in spending throughout the state**. This supported 454 total jobs, generated \$24.5 million in labor earnings, and produced \$70.1 million in total sales across industries such as accommodations, food services, retail, and entertainment. This reflects the direct, indirect, and induced effects of non-resident spending as it ripples through the state economy.

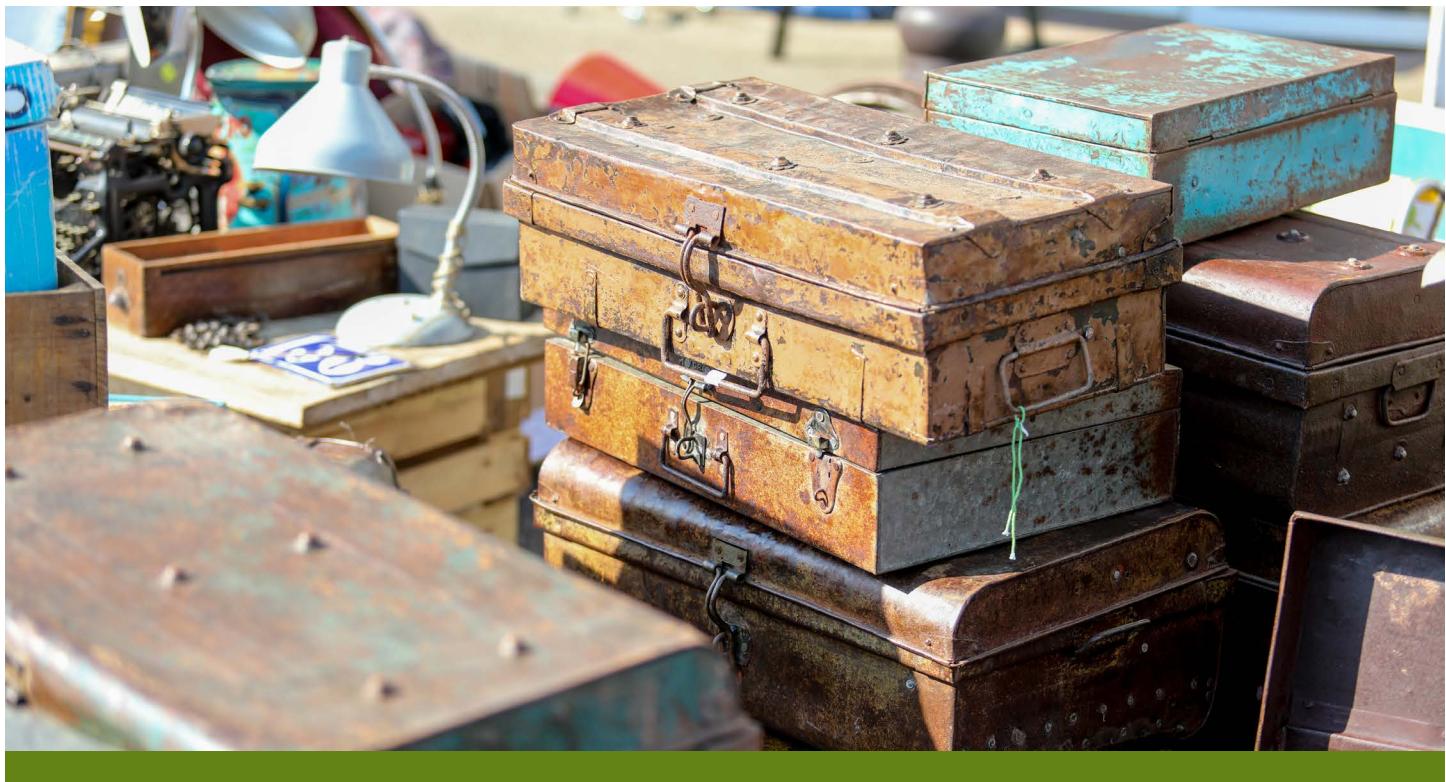
Table 5

Economic Contribution Generated by All Visitors to New York County Fairs			
	Jobs	Earnings	Sales
Direct	2,723	\$99,296,838	\$297,056,739
Indirect	601	\$51,367,574	\$135,313,688
Induced	835	\$69,533,178	\$188,672,897
Total	4,159	\$220,197,590	\$621,043,324

Source: Lightcast, Camoin Associates

Economic Impact Generated by Out-of-State Visitors Only			
	Jobs	Earnings	Sales
Direct	293	\$10,905,085	\$33,741,627
Indirect	67	\$5,741,624	\$15,065,478
Induced	94	\$7,828,566	\$21,248,060
Total	454	\$24,475,275	\$70,055,165

Source: Lightcast, Camoin Associates



Impact and Contribution of Spending at Off-Season Events

Using the visitation figures and spending baskets outlined above, we estimate that about **732,826 attendees spent approximately \$61.5 million while attending off-season events at New York's county fairgrounds**. This is referred to as "direct" spending and was used as the direct input into Lightcast's economic impact model. The model translates this spending into measurable economic effects—jobs, earnings, and sales—by estimating how each dollar circulates through the local and regional economy.

The economic contribution captures the broader role that off-season events play within New York's economy, including both resident and non-resident spending. This measure reflects the total employment, income, and business sales sustained by these activities as part of the state's ongoing economic base. **Altogether, off-season events supported approximately 886 jobs, \$45.5 million in labor earnings, and \$128.0 million in total sales in 2024.**

The economic impact represents new money entering New York's economy from visitors who reside outside the state. These dollars stimulate business activity that would not otherwise occur, supporting jobs and income across multiple sectors. **In 2024, approximately \$11.0 million of spending by out-of-state visitors was generated by off-season events**, which supported an estimated 154 total jobs, \$8.0 million in labor earnings, and \$22.7 million in total sales statewide. This includes direct effects (such as visitor purchases at fairgrounds

and local businesses), indirect effects (purchases made by suppliers), and induced effects (household spending by workers whose income is supported by event-related activity).

Table 6

Economic Contribution Generated by All Visitors to Off-Season Events			
	Jobs	Earnings	Sales
Direct	595	\$20,676,233	\$61,498,728
Indirect	119	\$10,499,938	\$27,566,537
Induced	172	\$14,341,093	\$38,906,759
Total	886	\$45,517,264	\$127,972,024

Source: Lightcast, Camoin Associates

Economic Impact Generated by Out-of-State Visitors Only			
	Jobs	Earnings	Sales
Direct	102	\$3,593,004	\$11,021,698
Indirect	21	\$1,822,160	\$4,772,703
Induced	31	\$2,547,987	\$6,915,322
Total	154	\$7,963,151	\$22,709,723

Source: Lightcast, Camoin Associates



TOTAL ANNUAL CONTRIBUTION AND IMPACT OF NEW YORK'S COUNTY FAIRGROUNDS

Table 7 presents the estimated annual economic impact and economic contribution of New York's county fairgrounds. This is the total activity that occurs as a result of the county fairs and the off-season events as discussed in the previous sections of this report. The analysis measures how fairground operations and associated spending support jobs, earnings, and business sales throughout the state economy.

The economic contribution section reflects the *total economic footprint* of all fairground-related operations and spending, including both resident and non-resident activity. **Altogether, New York's county fairgrounds support approximately 5,046 jobs, \$265.7 million in earnings, and \$749.0 million in total sales annually.** These findings underscore the statewide importance of fairgrounds as not only cultural and community assets but also as significant drivers of employment, income, and economic activity year-round.

The economic impact section captures *net new activity* generated by out-of-state visitors—spending that represents additional dollars flowing into New York's economy. **This activity supports an estimated 607 total jobs, \$32.4 million in labor earnings, and \$92.8 million in total sales across a wide range of industries, including accommodations, retail, and local services.**

Table 7

Total Economic Contribution—County Fairgrounds			
	Jobs	Earnings	Sales
Direct	3,318	\$119,973,071	\$358,555,467
Indirect	720	\$61,867,513	\$162,880,225
Induced	1,008	\$83,874,271	\$227,579,656
Total	5,046	\$265,714,855	\$749,015,348

Source: Lightcast, Camoin Associates

Total Economic Impact—County Fairgrounds			
	Jobs	Earnings	Sales
Direct	395	\$14,498,090	\$44,763,324
Indirect	88	\$7,563,784	\$19,838,181
Induced	124	\$10,376,553	\$28,163,382
Total	607	\$32,438,427	\$92,764,887

Source: Lightcast, Camoin Associates



COUNTY FAIRGROUNDS SPOTLIGHT

In the early 1900s, the Dutchess County Fair, then held in Poughkeepsie, became renowned for hosting air shows and other death-defying stunts following the Wright brothers' historic first powered flight in 1903.

ANNUAL CONTRIBUTION OF CARNIVAL OPERATIONS AT NEW YORK COUNTY FAIRS

In addition to the operational impacts related to fair organizations themselves, carnival operators that bring rides and attractions to New York's county fairs generate economic impact⁵.

SPENDING BY CARNIVAL OPERATORS

The approximate weekly spending for an “average” fair carnival was collected from the Survey of Carnival Operators. While not all county fairs incorporate carnivals, many do. Based on desktop research of the 50 county fairs throughout New York, an estimated 38 fairs host carnivals during their fair week.

The average weekly spending for the average fair carnival was multiplied by 38 fairs to estimate the total operational spending of carnival operators. This estimation assumes that, on average, carnivals are located at each county fair for one week. Table 8 demonstrates the estimated total operational spending of carnival operators. Across all 38 county fairs, this is estimated to total nearly \$2.5 million in 2024.

Table 8

Operational Spending Generated by Carnival Operators		
	Approx. Weekly Spending for Avg. Fair	Total Est. Spending (38 Fairs)
Groceries	\$10,000	\$380,000
Truck Parts and Tools	\$5,000	\$190,000
Vendor Food Supplies	\$25,000	\$950,000
Repairs and Maintenance	\$15,000	\$570,000
Fuel and Generators	\$10,000	\$380,000
Office Products	\$500	\$19,000
Total	\$65,500	\$2,489,000

Source: Camoin Associates based on Survey of Carnival Operators

⁵Carnival operator spending and employment are treated separately from county fairground operations to prevent double-counting of overlapping activity.

CARNIVAL OPERATIONS PAYROLL

Carnivals also create jobs and payroll within New York for the duration of carnival operations. According to the Survey of Carnival Operators, the estimated daily payroll for carnivals for the typical New York county fair is \$10,000. Assuming that each carnival spends an average of 7 days at each fair, and that 38 fairs have carnivals, an estimated \$2.6 million of total payroll was paid to carnival employees at NY county fairs in 2024.

Table 9

Est. Total Payroll Associated with Carnival Operation	
Approx. Fairs with Carnivals	38
Average Carnival Labor Days	7
Average Daily Carnival Payroll	\$10,000
Est. Total Payroll	\$2,625,000

Source: Camoin Associates based on Survey of Carnival Operators

Table 10

Contribution of Spending by All Carnivals			
	Jobs	Earnings	Sales
Direct	12	\$766,091	\$2,489,000
Indirect	4	\$313,044	\$833,520
Induced	6	\$526,308	\$1,428,375
Total	22	\$1,605,443	\$4,750,896

Contribution of Carnival Employment			
	Jobs	Earnings	Sales
Direct	67	\$2,625,000	\$7,022,965
Indirect	15	\$1,191,551	\$3,455,302
Induced	21	\$1,756,323	\$4,776,377
Total	103	\$5,572,874	\$15,254,644

Total Contribution of New York Carnivals			
	Jobs	Earnings	Sales
Direct	79	\$3,391,091	\$9,511,965
Indirect	19	\$1,504,595	\$4,288,822
Induced	27	\$2,282,631	\$6,204,752
Total	125	\$7,178,317	\$20,005,539

Source: Lightcast, Camoin Associates

TOTAL CONTRIBUTION OF NEW YORK CARNIVALS

The contribution of spending by carnival operators supports approximately 22 jobs, \$1.6 million in labor earnings, and \$4.8 million in total sales. Meanwhile, the contribution of carnival employment, which represents the ongoing wages of carnival workers, supports an additional 103 jobs, \$5.6 million in earnings, and \$15.3 million in sales across New York's economy. When combined, the **total contribution of New York carnivals amounts to 125 jobs, \$7.2 million in labor income, and \$20.0 million in total sales.**



FISCAL IMPACTS

The fiscal impacts of New York's county fairgrounds include the sales tax revenue generated for the host county and the state. While fiscal impacts will vary depending on a county's tax base, rate structure, and distribution schedules, this analysis estimates statewide sales tax revenues based on total direct spending and earnings supported by fairground activity.

SALES TAX REVENUE

Sales Tax Revenue From Direct Visitor Spending

Across all New York county fairgrounds, the total direct sales amount associated with visitor spending is estimated at \$358.5 million annually. Assuming 95% of these sales are taxable under the average combined 8% sales tax rate (4% retained by New York State and 4% by counties), total sales tax revenue amounts to approximately \$27.2 million statewide, divided equally between the state and county governments—\$13.6 million each.

Of this total, spending by out-of-state visitors accounts for approximately \$44.8 million in direct sales, producing an estimated \$3.4 million in sales tax revenue, split evenly between the state and counties (about \$1.7 million each).

Sales Tax Revenue from Carnival Operators' Purchases

Carnival operators travel throughout New York State to provide attractions and services at county fairs. While operating locally, these businesses make local purchases such as supplies, fuel, maintenance, and food, which generate taxable sales. Table 12 estimates the amount of sales tax revenue produced from these local transactions.

Of the estimated \$2.5 million in direct sales to carnival operators, approximately 85% is assumed to be taxable. Applying the state's average combined 8% sales tax rate, these purchases generate about \$169,000 in total tax revenue, split evenly between New York State and county governments.



Table 11

Sales Tax Revenue from Out-of-State Visitors to New York's County Fairgrounds—Direct Sales

Direct Sales (All Events)	\$44,763,324
Taxable Sales (95%)	\$42,525,158
New Tax Revenue	\$3,402,013
Approximate Tax Revenue Collected by New York State (4%)	\$1,701,006
Approximate Tax Revenue Collected by New York counties (4%)	\$1,701,006

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

Sales Tax Revenue from all Visitors to New York's County Fairgrounds—Direct Sales

Direct Sales (All Events)	\$358,555,467
Taxable Sales (95%)	\$340,627,693
Total Tax Revenue	\$27,250,215
Approximate Tax Revenue Collected by New York State (4%)	\$13,625,108
Approximate Tax Revenue Collected by New York counties (4%)	\$13,625,108

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

Table 12

Sales Tax Revenue Generated by Carnival Operators Making Local Purchases

Direct Sales to Carnival Operators	\$2,489,000
Taxable Sales (85%)	\$2,115,650
Total Tax Revenue	\$169,252
Approximate Tax Revenue Collected by New York State (4%)	\$84,626
Approximate Tax Revenue Collected by New York counties (4%)	\$84,626

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

⁶ Assumes 95% of direct spending is taxable, excluding 5% for non-taxable food items and select fairground expenses.

⁷ Based on spending patterns, 85% accounts for nontaxable items purchased at grocery stores and other select retailers.

Sales Tax Revenue from Earnings

In addition to direct visitor spending, earnings supported by fairground operations also generate taxable sales within local economies. It is assumed that 70% of total earnings are spent within the county and 25% of that spending is taxable. Using these assumptions, earnings supported by all visitors to New York's county fairs contribute roughly \$3.7 million in new sales tax revenue—again divided evenly between the state (\$1.9 million) and counties (\$1.9 million). Out-of-state visitors account for approximately \$454,000 in additional tax revenue from supported earnings, split evenly between the state and counties (\$227,000 each).



Table 13

Sales Tax Revenue from Earnings Supported by all Visitors to New York's County Fairgrounds	
Total Earnings (All Events)	\$265,714,854
Earnings Spent in New York (70%)	\$186,000,398
Taxable Sales (25%)	\$46,500,100
Total Tax Revenue	\$3,720,008
Approximate Tax collected by New York State (4%)	\$1,860,004
Approximate Tax Revenue Collected by New York counties (4%)	\$1,860,004

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

Sales Tax Revenue from Earnings Supported by Out-of-State Visitors to New York's County Fairgrounds

Sales Tax Revenue from Earnings Supported by Out-of-State Visitors to New York's County Fairgrounds	
Total Earnings (All Events)	\$32,438,427
Earnings Spent in New York (70%)	\$22,706,899
Taxable Sales (25%)	\$5,676,725
New Tax Revenue	\$454,138
Approximate Tax collected by New York State (4%)	\$227,069
Approximate Tax Revenue Collected by New York counties (4%)	\$227,069

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

Table 14

Total County Sales Tax Revenue Supported by all Visitors to New York's County Fairgrounds	
Direct Sales to Fairground Visitors	\$13,625,108
Direct Sales to Carnival Operators	\$84,626
Earnings	\$1,860,004
Total	\$15,569,738

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

IMPACT SALES TAX REVENUE

Combining sales tax revenue from both direct visitor spending and supported earnings, New York counties collectively receive approximately \$15.6 million in annual sales tax revenue related to county fairgrounds. Of this total, around \$1.9 million is generated by out-of-state visitors.



Total County Sales Tax Revenue Supported by Out-of-State Visitors to New York's County Fairgrounds	
Direct Sales to Fairground Visitors	\$1,701,006
Earnings	\$227,069
Total	\$1,928,075

Source: Camoin Associates, Lightcast, New York State Department of Taxation and Finance

⁸ Assumptions related to the percent of purchases that are taxable are based on a breakdown of typical household spending (Source: BLS and Lightcast). Spending on services and groceries are some of the biggest categories of household expenditures and are non-taxable.

⁹ Tax revenue generated by carnival employees is accounted for in this section.

ATTACHMENT A: WHAT IS ECONOMIC IMPACT ANALYSIS?

An economic impact analysis describes how “new” money entering a region influences the local economy. This “new” money can be generated in two ways:

- 1) When an industry, event, or policy brings new revenue into the region that would otherwise not exist.
- 2) When an industry, event, or policy retains revenue that would have otherwise left the region.

Economic impact analyses can also assess the negative economic implications of “losing” a particular business, industry, or attraction, which results in money leaving the region.

Economic impacts do not occur when spending simply shifts from one business or industry to another. For example, town residents attending a game at a new football stadium instead of going to the local movie theater will not generate new economic impacts. However, if town leaders decide to host a concert series at the new football stadium, new visitation and spending related to the concert series would create an economic impact.

UNDERSTANDING ECONOMIC IMPACTS

Economic impacts are typically broken down into direct, indirect, and induced effects.

Direct Effects are the new activities under investigation.

Example: The sale of RVs from a new manufacturer in Elkhart, IN, to the rest of the country.

Indirect Effects reflect the extent of local supply chains for the activity being analyzed.

Example: The steel, tires, and cabinets purchased by the RV manufacturer in Elkhart, IN, from local suppliers, the purchases made by those suppliers from their local suppliers, and so on.

Induced Effects represent the actions of employees who are supported by direct and indirect activities.

Example: An employee who works for the RV company’s primary tire supplier in Elkhart, IN, purchases groceries at the local supermarket.

Traditionally, the three types of effects are evaluated in terms of jobs, labor income or earnings, industry output, or sales, and value-added or gross regional product. The sum of the direct, indirect, and induced effects is equal to the total economic impact.

ESTIMATING ECONOMIC IMPACTS

An input-output (I-O) model is used to estimate these effects. In the US, I-O models are derived from the Bureau of Economic Analysis’ Input Output-Accounts. These accounts provide the economic “recipe” each industry follows to produce its output. This includes the value of inputs purchased from other industries, as well as the contributions of labor, taxes paid, and a measure of profits. I-O models also capture household spending patterns.

These inputs are adjusted for each study area based on the estimated portion of goods and services that businesses and households purchase from local suppliers. Adjustments are also made for in-commuting by workers who then take their earnings home and spend them outside the region.

The resulting “multipliers” show, for each direct dollar spent in the region, how many additional dollars (or cents) are generated at local suppliers (indirect) and providers of goods and services to households (induced). For example, if an industry has a multiplier of 2.5, for every positive or negative change to that industry. In this case, the total effect on the regional economy will be 2.5 times the original change.

BENEFITS OF AN ECONOMIC IMPACT ANALYSIS

Economic impact analysis is a flexible tool that can be used to quantify the benefit/cost of a particular project, asset, or industry. To yield the most accurate results, studies of this nature rely heavily on high-quality data and research-based assumptions. A well-crafted economic impact analysis can be used by governments, businesses, and organizations to clearly tell a story about how a specific change will affect a given economic environment.

ATTACHMENT B: DATA SOURCES



Lightcast (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type.

[Learn More](#)



IMPLAN is an economic impact analysis platform built on data (at the county, state, and national level) on commodities, core competencies, deflators, demographics, employment and wages, environmental factors, industries, occupations, taxes, and trade flows. As a modeling tool and regional economic database, IMPLAN allows for easy comparison across regions, industries, and time.

[Learn More](#)

ABOUT CAMOIN ASSOCIATES

As the nation's only full-service economic development and lead generation consulting firm, Camoin Associates empowers communities through human connection backed by robust analytics.

Since 1999, Camoin Associates has helped local and state governments, economic development organizations, nonprofit organizations, and private businesses across the country generate economic results marked by resiliency and prosperity.

To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on [LinkedIn](#), [Facebook](#), and [YouTube](#).

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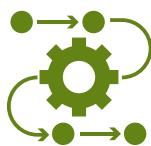


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and Talent Retention**



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