# 2025

# Economic Impact of Visitors to Illinois

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

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# Introduction

**Visitors are integral to Illinois' 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 Illinois' visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

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

# KEY FINDINGS

# Key Findings

## Visitors Generate Massive Economic Impact

In 2025, **115.0 million visitors spent $50.2 billion** in the Illinois economy, increasing 1.9%, and 3.5% year-over-year, respectively.

**115.0M** VISITORS TO ILLINOIS

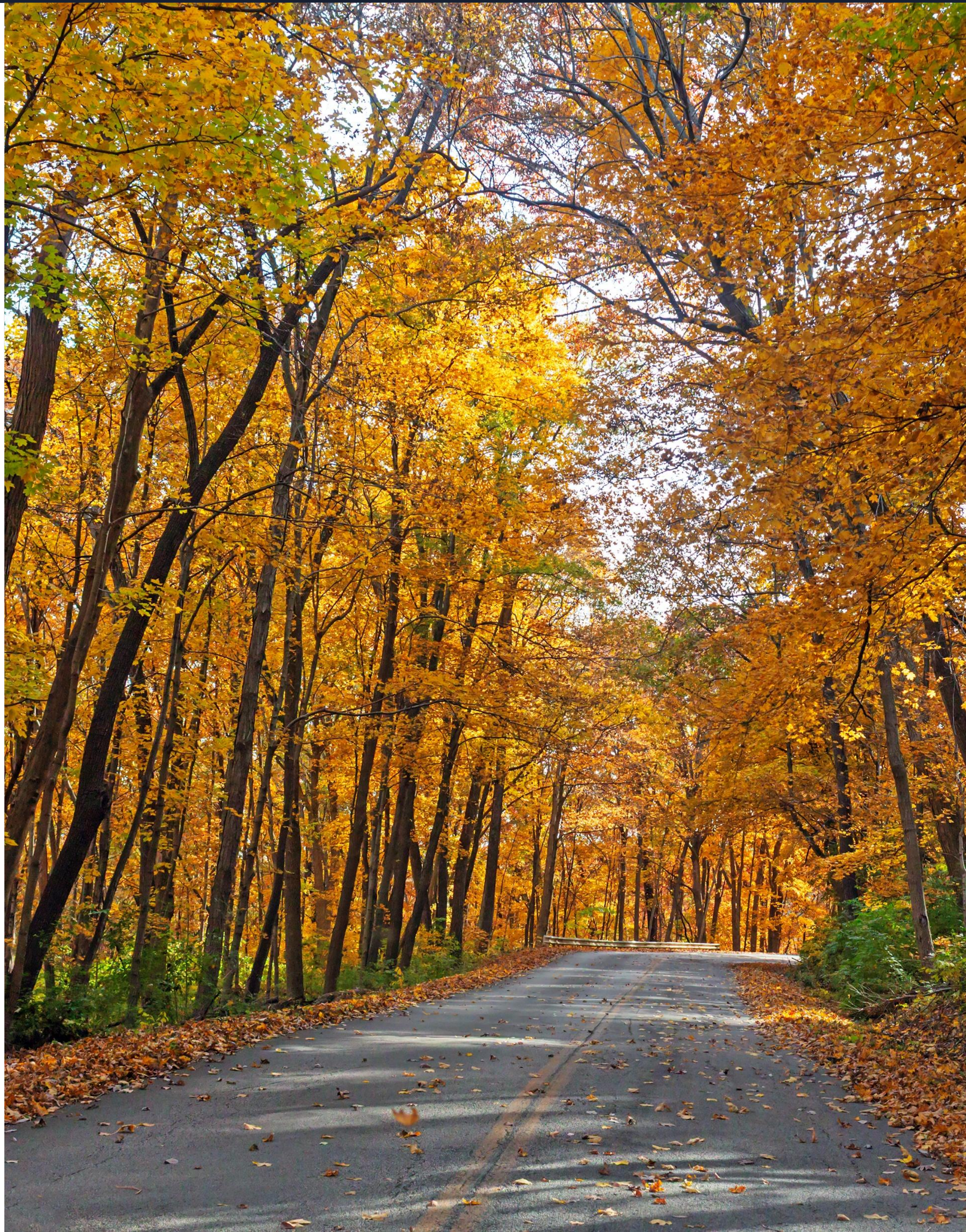
**$50.2B** VISITOR SPENDING

**$88.0B** TOTAL ECONOMIC IMPACT

**$28.5B** TOTAL PERSONAL INCOME

**460,678** TOTAL JOBS SUPPORTED

**$7.1B** STATE AND LOCAL TAXES



## Results in Context

The visitor economy is an economic pillar in Illinois. In 2025, visitor spending supported about one-in-13 jobs in Illinois.

### $50.2B VISITOR SPENDING

Visitors spent $137.5 million per day, on average, in Illinois.

### $28.5B PERSONAL INCOME

This is the equivalent of $5,652 per resident household, regardless of any connection to the visitor economy.

### 460,678 JOBS

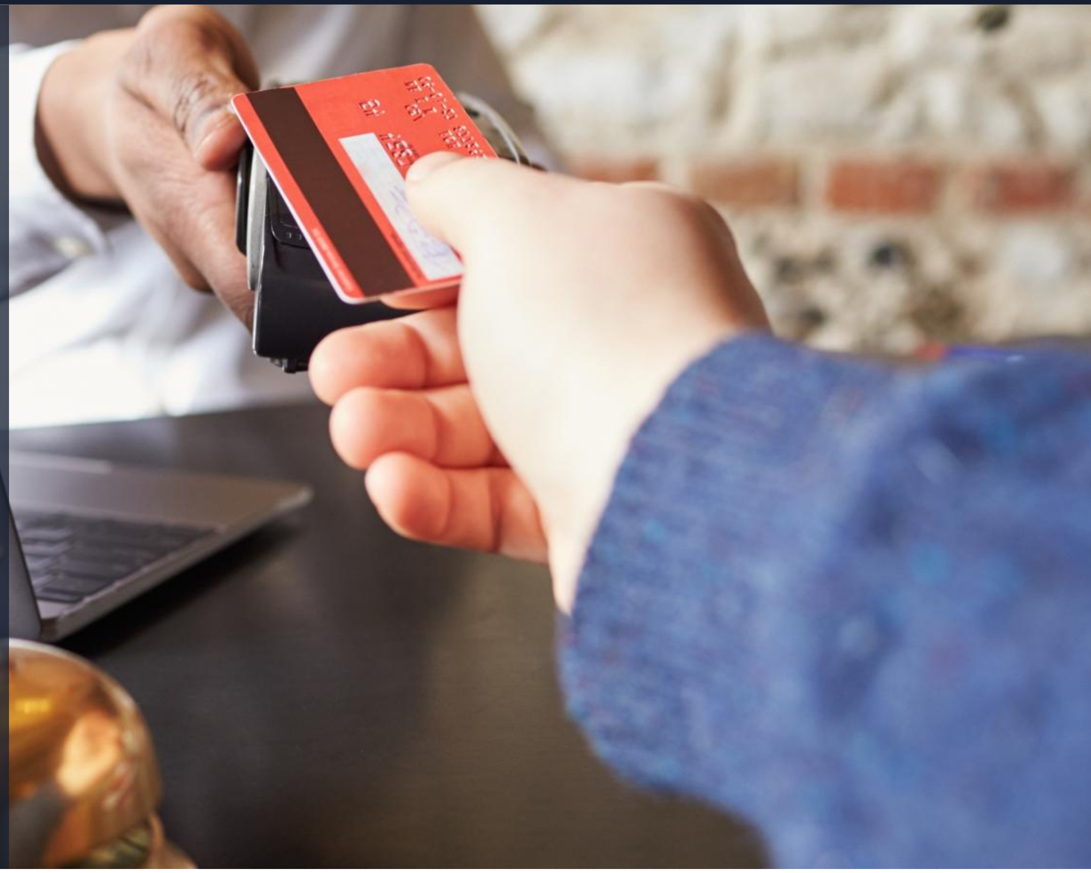
The visitor economy sustained 7.6% of all jobs in Illinois.

### $7.1B STATE & LOCAL TAXES

Each household in Illinois would need to be taxed an additional $1,403 to replace the visitor-generated taxes received by state and local government in 2025.

# VISITOR VOLUME & SPENDING

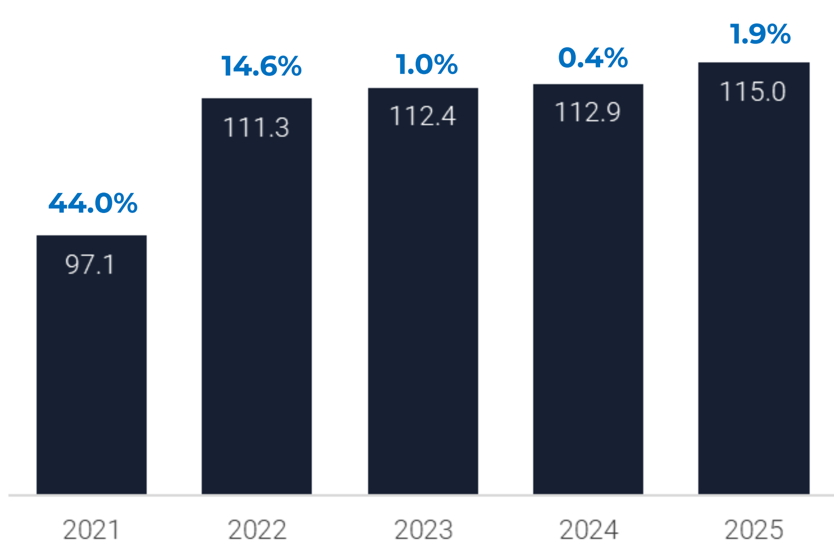
Illinois welcomed **115.0 million** visitors who spent **$50.2 billion** in 2025.



## Visitor Volume

In 2025, 115.0 million visitors traveled to Illinois. Declines in international visitors were offset by increases in domestic day visitors.

**Illinois Visitor Volume**
millions




Source: Tourism Economics

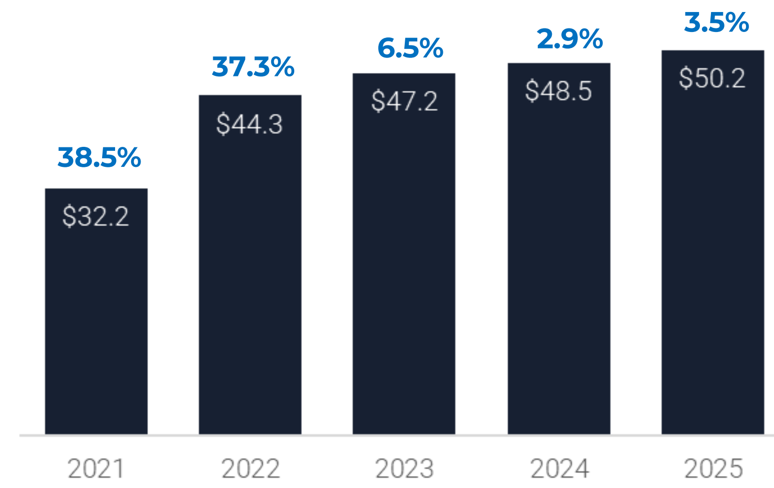
## Visitor Spending

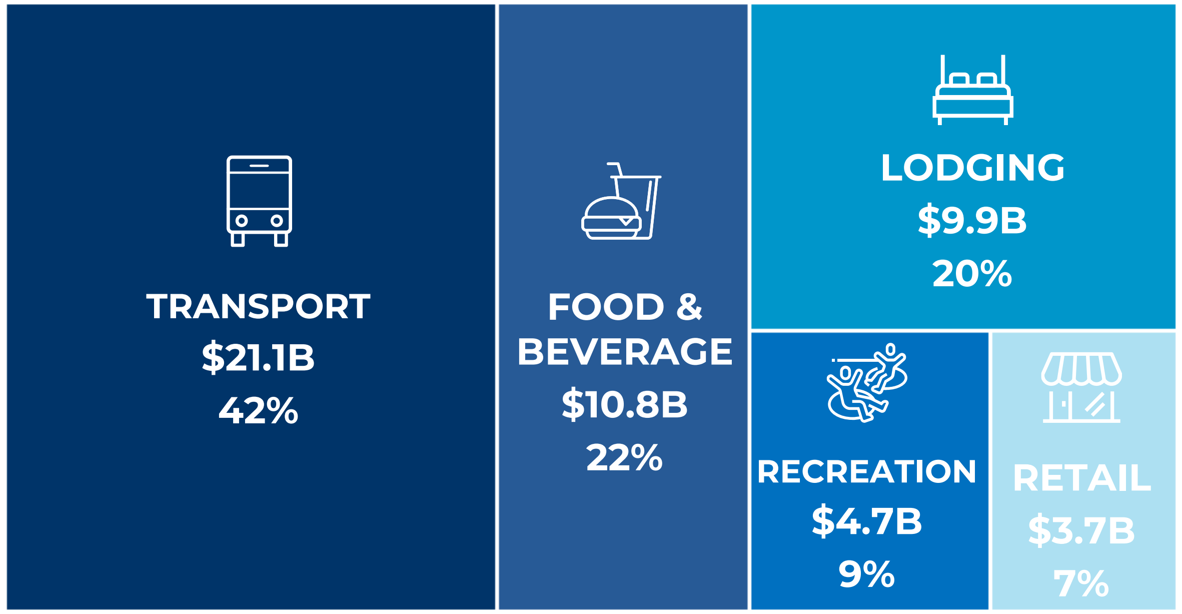
Visitor spending increased 3.5% to $50.2 billion in 2025.

Of the $50.2 billion spent, transportation accounted for $21.1 billion—42% of all visitor spending.

Visitors spent 22% of their budget on food and beverage purchases.

**Illinois Visitor Spending**
$ billions




Source: Tourism Economics

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

# Visitor Volume and Spending Trends

Visitor spending expanded 3.5% in 2025, largely driven by increased domestic visitors and increased prices in key visitor related goods and services.

Recreation spending led spending growth in 2025, growing 6.1%, which was followed closely by food and beverage, increasing 5.7%. Driven by growing room rates, spending on lodging increased 3.3%. Retail spending saw slight gains as well, growing 2.7%. Transportation spending rose 2.0%, lagging overall growth, as relatively lower gas prices were partly offset by higher spending on local transportation and airfare.

**Illinois Visitor Spending and Annual Growth**
$ billions

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2025 Growth |
|---|---|---|---|---|---|---|
| **Total visitor spending** | **$32.2** | **$44.3** | **$47.2** | **$48.5** | **$50.2** | **3.5%** |
| Transportation | $13.7 | $19.5 | $20.7 | $20.7 | $21.1 | 2.0% |
| Food & beverage | $7.5 | $9.3 | $9.9 | $10.2 | $10.8 | 5.7% |
| Lodging | $5.3 | $8.1 | $8.8 | $9.6 | $9.9 | 3.3% |
| Recreation | $2.8 | $3.9 | $4.3 | $4.5 | $4.7 | 6.1% |
| Retail | $2.9 | $3.5 | $3.6 | $3.6 | $3.7 | 2.7% |

Source: Tourism Economics

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

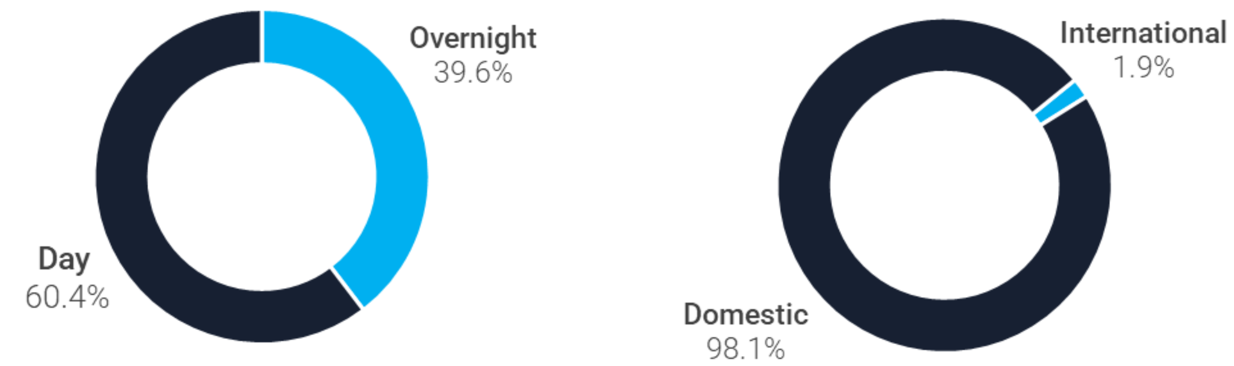
Domestic visitor volumes continued to climb in 2025, expanding 2.1%. Day visitors drove domestic visitor growth, while overnight visitor growth was flat. International visitor volumes and spending saw declines in 2025, driven by a sharp decline in Canadian visitors.

**Illinois Visitor Volumes and Spending, By Segment**
millions of visitors, $ billions

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2025 Growth |
|---|---|---|---|---|---|---|
| **Total visitors** | **97.1** | **111.3** | **112.4** | **112.9** | **115.0** | **1.9%** |
| Domestic | 96.5 | 109.7 | 110.2 | 110.5 | 112.8 | 2.1% |
| International | 0.5 | 1.6 | 2.2 | 2.3 | 2.2 | -5.1% |
| **Total visitor spending** | **$32.2** | **$44.3** | **$47.2** | **$48.5** | **$50.2** | **3.5%** |
| Domestic | $31.5 | $42.3 | $44.3 | $45.2 | $47.1 | 4.1% |
| International | $0.8 | $2.0 | $2.9 | $3.3 | $3.1 | -5.1% |

Sources: DK Shifflet/MMGY, Tourism Economics

**Illinois Visitor Volume Share, By Segment (2025)**
% share




Sources: DK Shifflet/MMGY, Tourism Economics

# ECONOMIC IMPACT METHODOLOGY

# Economic Impact Methodology

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

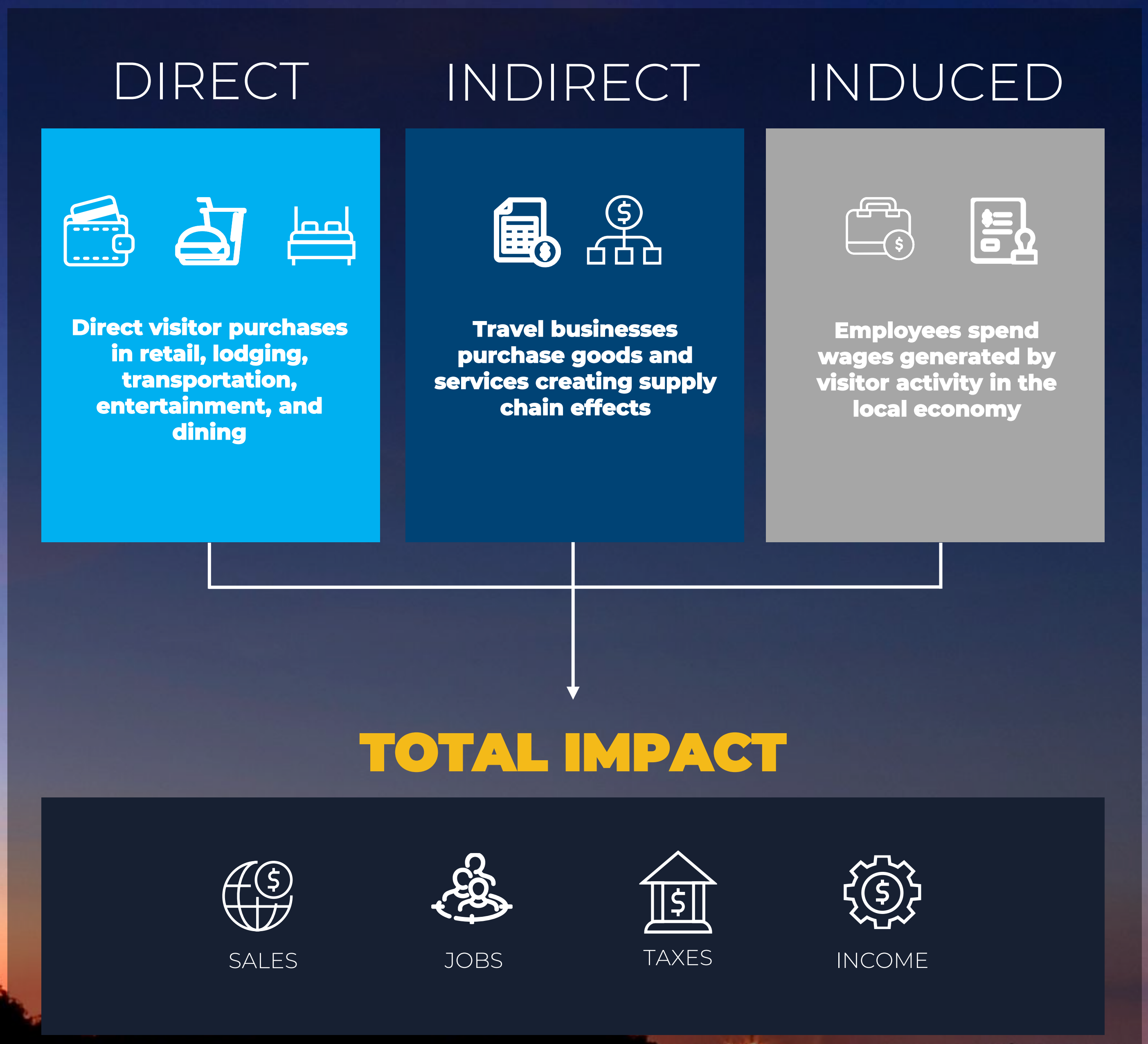
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitor spending through the local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



# ECONOMIC IMPACT

# Business Sales Impacts

Visitors spent $50.2 billion in Illinois in 2025. These direct impacts generated an additional $37.8 billion through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached $88.0 billion in 2025.

**$50.2B** Visitor Spending *(Direct Sales)* **+** **$17.3B** Indirect Sales **+** **$20.6B** Induced Sales **=** **$88.0B** Total Economic Impact

### Business Sales by Industry (2025)

$ millions

| | Direct Business Sales | Indirect Business Sales | Induced Business Sales | Total Business Sales |
|---|---|---|---|---|
| **Total, all industries** | **$50,202** | **$17,261** | **$20,557** | **$88,020** |
| Food & Beverage | $10,813 | $844 | $1,498 | $13,154 |
| Finance, Insurance, Real Estate | $2,171 | $4,447 | $6,109 | $12,727 |
| Lodging | $9,871 | $5 | $18 | $9,894 |
| Air Transport | $9,493 | $90 | $260 | $9,842 |
| Other Transport | $4,853 | $1,624 | $551 | $7,027 |
| Business Services | | $4,104 | $2,034 | $6,138 |
| Retail Trade | $3,694 | $152 | $1,346 | $5,192 |
| Recreation and Entertainment | $4,363 | $325 | $382 | $5,070 |
| Gasoline Stations | $4,565 | $23 | $73 | $4,661 |
| Education and Health Care | | $39 | $3,617 | $3,655 |
| Communications | | $1,311 | $1,103 | $2,415 |
| Manufacturing | | $1,476 | $695 | $2,171 |
| Personal Services | $379 | $477 | $1,111 | $1,967 |
| Wholesale Trade | | $946 | $1,014 | $1,960 |
| Construction and Utilities | | $1,112 | $592 | $1,704 |
| Government | | $187 | $102 | $289 |
| Agriculture, Fishing, Mining | | $100 | $52 | $152 |

Source: Tourism Economics

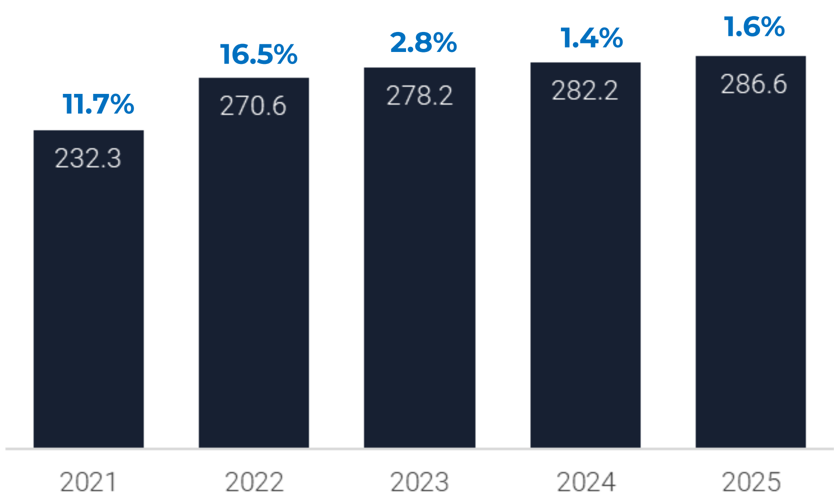
The total economic impact of **$88.0 billion** accrued to industries across the economy.

# Direct Employment

Employment directly supported by visitor activity increased 1.6% in 2025, tallying 286,620 jobs. Visitor-supported employment is a significant part of several industries in Illinois—nearly all of lodging employment, 30% of recreation employment, and 26% of food and beverage jobs are supported by visitor spending.

**Visitor-Supported Employment in Illinois**

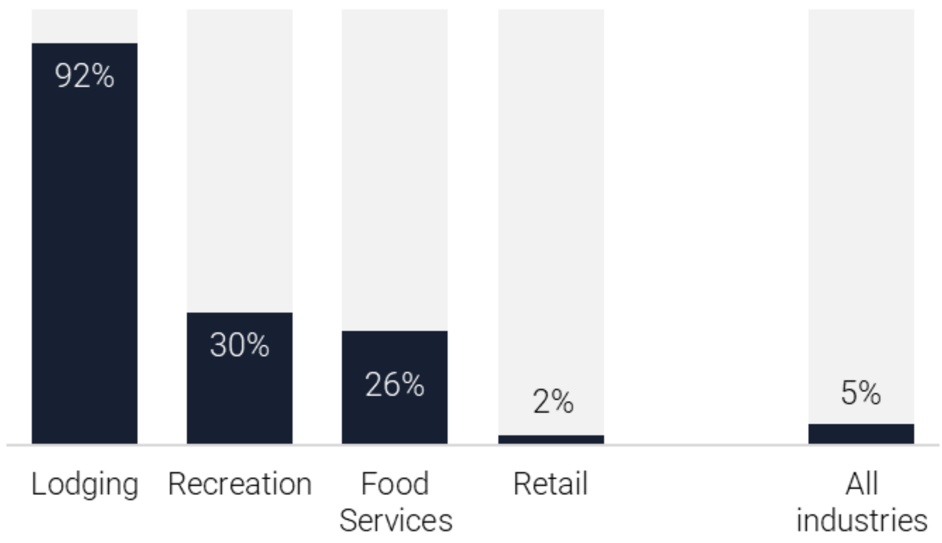
Thousands of jobs, direct only




Source: Tourism Economics

**Tourism Employment Intensity (2025)**

direct share of total industry employment




Source: Tourism Economics

The visitor economy in Illinois directly supported almost **287,000 local jobs**.

# Employment Impacts

Visitor activity sustained 286,620 direct jobs in 2025, with an additional 174,057 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 460,678 in 2025, translating to about one-in-13 jobs (7.6%) in the state.

**286.6K** Direct Jobs + **72.7K** Indirect Jobs + **101.4K** Induced Jobs = **460.7K** Total Jobs

**Employment by Industry (2025)**
jobs

| | Direct Jobs | Indirect Jobs | Induced Jobs | Total Jobs |
|---|---|---|---|---|
| **Total, all industries** | **286,620** | **72,686** | **101,371** | **460,678** |
| Food & Beverage | 120,407 | 9,104 | 14,766 | 144,276 |
| Other Transport | 36,846 | 11,764 | 4,688 | 53,299 |
| Lodging | 41,885 | 31 | 107 | 42,024 |
| Recreation and Entertainment | 30,252 | 2,934 | 3,231 | 36,417 |
| Business Services | | 21,396 | 10,957 | 32,353 |
| Finance, Insurance, Real Estate | 4,871 | 13,287 | 12,145 | 30,302 |
| Education and Health Care | | 319 | 25,637 | 25,956 |
| Personal Services | 9,856 | 3,677 | 11,326 | 24,859 |
| Retail Trade | 11,972 | 1,153 | 10,524 | 23,648 |
| Air Transport | 22,758 | 158 | 456 | 23,372 |
| Gasoline Stations | 7,774 | 180 | 594 | 8,548 |
| Wholesale Trade | | 2,213 | 2,215 | 4,428 |
| Communications | | 1,894 | 1,856 | 3,750 |
| Construction and Utilities | | 1,557 | 951 | 2,509 |
| Manufacturing | | 1,415 | 1,003 | 2,418 |
| Government | | 1,250 | 651 | 1,900 |
| Agriculture, Fishing, Mining | | 356 | 264 | 619 |

Source: Tourism Economics

Visitor spending supports **one-in-13 of all jobs** in Illinois, including over **144,000 jobs** in the food and beverage industry.

# Personal Income Impacts

Visitor activity generated $15.9 billion in direct personal income in 2025. Including indirect and induced impacts, employees received $28.5 billion in personal income. Total visitor-generated income in Illinois increased 4.3% in 2025.

**$15.9B** Direct Personal Income + **$5.8B** Indirect Personal Income + **$6.8B** Induced Personal Income = **$28.5B** Total Personal Income

**Personal Income by Industry (2025)**

$ millions

| | Direct Personal Income | Indirect Personal Income | Induced Personal Income | Total Personal Income |
|---|---|---|---|---|
| **Total, all industries** | **$15,902** | **$5,805** | **$6,760** | **$28,467** |
| Food & Beverage | $3,939 | $365 | $521 | $4,825 |
| Lodging | $3,324 | $2 | $7 | $3,333 |
| Business Services | | $2,081 | $1,042 | $3,122 |
| Air Transport | $2,952 | $24 | $70 | $3,046 |
| Other Transport | $1,732 | $803 | $223 | $2,758 |
| Recreation and Entertainment | $2,097 | $139 | $146 | $2,382 |
| Finance, Insurance, Real Estate | $410 | $958 | $954 | $2,322 |
| Education and Health Care | | $18 | $1,895 | $1,914 |
| Personal Services | $416 | $245 | $577 | $1,238 |
| Retail Trade | $657 | $49 | $456 | $1,162 |
| Wholesale Trade | | $284 | $289 | $573 |
| Communications | | $282 | $244 | $527 |
| Gasoline Stations | $377 | $7 | $22 | $405 |
| Construction and Utilities | | $234 | $129 | $362 |
| Manufacturing | | $157 | $98 | $255 |
| Government | | $137 | $73 | $210 |
| Agriculture, Fishing, Mining | | $18 | $14 | $32 |

Source: Tourism Economics

# Tax Impacts

Visitor activity generated $12.5 billion in government revenues in 2025.

State and local taxes alone tallied $7.1 billion in 2025.

Each household in Illinois would need to be taxed an additional $1,403 to replace the visitor-generated taxes received by state and local governments in 2025.

**Tax Impacts (2025)**
$ millions

| | Direct | Total |
|---|---|---|
| **Total Tax Revenues** | **$9,223** | **$12,469** |
| **Federal Taxes** | **$4,296** | **$5,404** |
| Personal Income | $1,546 | $1,944 |
| Corporate | $302 | $377 |
| Indirect Business | $422 | $534 |
| Social Insurance | $2,027 | $2,549 |
| **State and Local Taxes** | **$4,927** | **$7,064** |
| Sales | $2,427 | $3,273 |
| Lodging | $349 | $349 |
| Personal Income | $580 | $873 |
| Corporate | $136 | $214 |
| Social Insurance | $3 | $6 |
| Excise and Fees | $223 | $301 |
| Property | $1,209 | $2,048 |

Source: Tourism Economics

The visitor economy generated over **$12.5 billion in government revenue** in 2025.

# APPENDIX

# 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 Illinois.

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

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

The complete set of data inputs is provided below.

## Data Sources

- **DK Shifflet / MMGY:** survey data, including spending and visitor profile characteristics for visitors to Illinois
- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR & AirDNA:** Lodging performance data, including room demand and revenue for hotels
- **Illinois Department of Revenue:** Hotel Operators' Occupation Tax data, and sales tax data by category for Illinois
- **BEA/BLS**: Employment, wage, and CPI data, by industry
- **US Census:** Business sales and employment by industry, seasonal second homes inventory, population, households, and median real estate taxes paid
- **U.S. Bureau of Transportation**: Air passenger data for airports in Illinois
- **U.S. Energy Information Administration:** Gasoline prices for the Chicago area
- **Tourism Economics:** International arrivals data for overseas, Canadian, and Mexican travel to Illinois

## 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 visitor 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.* |

# 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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