

2018 ANNUAL REPORT



**NIAGARA
FALLS[®]**
USA

WHERE ADVENTURE COMES NATURALLY[®]

DESTINATION NIAGARA USA

DIGITAL MARKETING CAMPAIGNS

We launched integrated marketing campaigns in specifically targeted markets in order to further drive incremental visitation, spending and repeat business.

SPRING



42,278,602
Impressions

237,590
Clicks

211,711
Web Conversions

349
Email Sign-Ups

4,692
Travel Guide Requests

110,744
1 Minute 30 Seconds
Time on Site

Hotel & Flight Searches: **25,749**

FALL



23,879,980
Impressions

232,115
Clicks

258,188
Web Conversions

165
Email Sign-Ups

2,692
Travel Guide Requests

109,177
1 Minute 30 Seconds
Time on Site

Hotel & Flight Searches: **43,905**

ULTIMATE SUMMER SWEEPSTAKES



The Niagara Falls USA Summer Sweepstakes ran from July 5 – September 5. It was promoted organically across social media platforms and with paid Facebook click-to-website ads. The contest went viral when it was shared across multiple sweepstakes websites which resulted in extremely high engagement.

Total Contest Entries:

27,434

Email Opt-Ins:

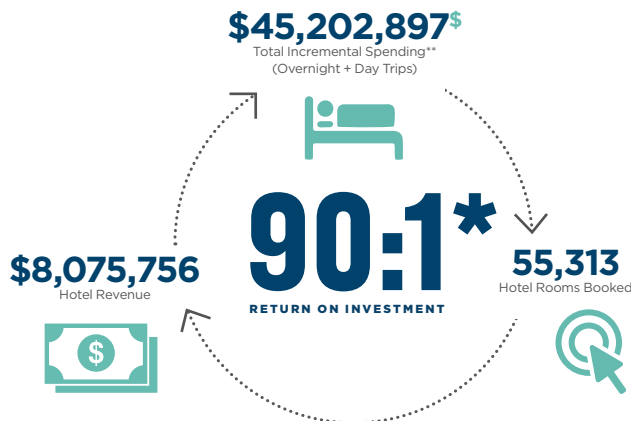
9,516

Shares:

830

Total Paid Impressions:

372,909



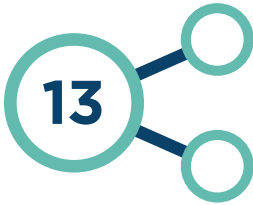
*Based on Adara Attribution platform measuring actual consumer transactions generated from Niagara Falls USA website and digital placements.

**Incremental spending is money that would not have been spent if not for Destination Niagara USA marketing efforts.

*Above amount used in calculation of organization ROI on page 15.

MEDIA

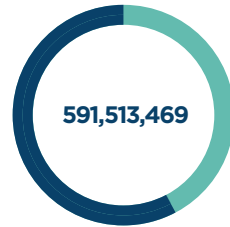
As stewards of a world-renowned icon, we work tirelessly to garner significant media attention. It is also invigorating when the rest of the region gets the attention it deserves.



Visiting Media Hosted



Destination stories
across all media channels
(print, television, online, etc.)



Total number of
media impressions
(Individual views)



Travel Media Showcase

In September, we hosted Travel Media Showcase, an annual industry event that connects destination marketing organizations with top travel journalists from around the country. Seventy-two journalists were in attendance for this three day showcase that included one-on-one appointment sessions, six local FAM tours and multiple networking opportunities. The journalists continue to share their media coverage from their time in Niagara Falls USA as they go live and all coverage is being compiled.



Niagara Falls Underground Railroad Heritage Center

In May, we pitched several national media outlets on the opening of the new Underground Railroad Heritage Center and the story was first picked up by the Associated Press and appeared in over fifty-five news publications across the United States. Additionally, USA Today picked up the story from the Associated Press and ran it as part of a story called "Must-see exhibits at U.S. museums for summer 2018." The overall coverage amounted to a total of 202,309,586 media impressions.

WEBSITE & SOCIAL MEDIA

2018 WEBSITE
VISITATION:

1,359,701

Stats for Facebook, Twitter, Instagram and LinkedIn



Total fans for all four channels:

104,795

Link clicks from posts:

79,400

Total impressions for Facebook,
Twitter, Instagram and LinkedIn:

14.9 MILLION

Overall engagement for Facebook,
Twitter, Instagram and LinkedIn:

70,900



2018 Page Views:

3,058,253



2018 Unique Visits:

1,039,057

INTEGRATED MARKETING CAMPAIGN AWARDS



**2018 Silver HSMIA
Adrian Award Winner***



**2018 NYSTIA Tourism &
Excellence Award****

*HSMIA is a global organization of sales, marketing, and revenue management professionals representing all segments of the hospitality industry.

**The New York State Tourism Industry Association represents NYS's tourism industry through collaboration, research, legislative awareness and exceptional marketing.

MOVING VISITORS THROUGH NIAGARA COUNTY

We know Niagara Falls USA attracts visitors from all over the world, and we want to make sure everyone has an extraordinary experience. That's why we ensure every connection with our brand from the website and social media to our brand ambassadors exceeds expectations.



Visitor Center

In 2018, the Niagara Falls USA Official Visitor Center welcomed 139,013 visitors which was a 12.3% increase over 2017.

EXP Niagara

This free online training program provides the hospitality and tourism community with the training needed to enhance visitor experiences by educating them on our destination's tourism product as well as customer preferences.



207 members of the hospitality and tourism community completed EXP Niagara during 2018, for a total of 528 Certified EXP Pros since the program's launch.

Day of Appreciation

The fourth annual Day of Appreciation took place on May 8, 2018 to celebrate all hospitality employees and their contribution to Niagara County's tourism industry. 686 attendees enjoyed food, entertainment and prize giveaways.



Retail

With the popularity of the Niagara Falls USA logo, we were proud to extend the Niagara Falls USA brand to visitors from all over the world. On May 1, the Visitor Center added apparel and gift items exclusively featuring the Niagara Falls USA brand.

The retail space saw significant traffic, selling over 3,700 branded items, making the Niagara Falls USA moniker a walking billboard all over the globe.

GLOBAL INITIATIVES

Brand USA Inspiration Guide Program 2018



50+

14 print and digital language editions in 50+ countries.



547,000

547,000 print copies distributed at Trade Shows, Embassies, Visa offices, IPW Registration bags, etc.



57

57 major global tour operators use the print guide for their customer trip planning purposes.



3,562,385

Digital Inspiration Guide Total Pageviews: 3,562,385

Presenting Niagara Falls USA to the World

By attending/participating in travel trade marketplaces and carrying out sales calls/missions, we met with over (172) travel trade companies representing China, India, UK, Germany, Australia, France and more.

40+

Sales Calls

Tour and Receptive Tour Operators in New York City, Orlando and Miami.

2

Sales Missions

ILoveNY UK Sales Mission
ILoveNY California Sales Mission

3

Tradeshows

Holiday World - Dublin, Ireland
IPW 2018 - Denver, CO
World Travel Market - London, England

5

Tours

In-market familiarization tours with Tour Operators and Receptive Tour Operators

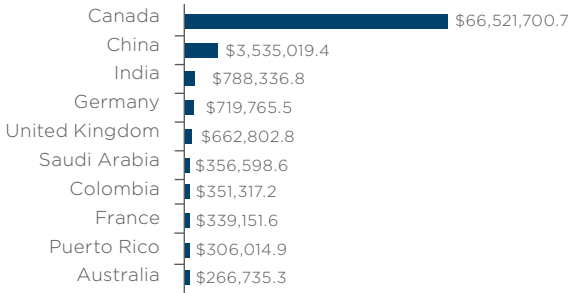
Partnerships



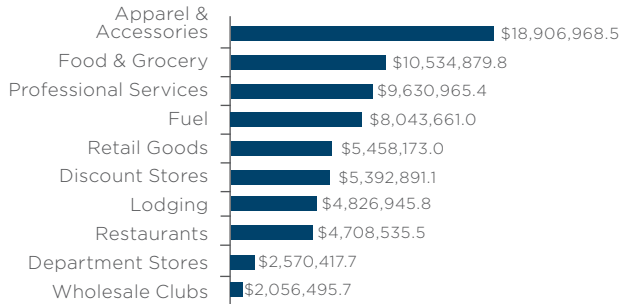
VISAVUE®

VisaVue® provides transactional data and insight into consumers, who use Visa credit cards. We are able to identify and track the spending activity of international visitors throughout Niagara County. This provides performance measures highlighting: year over year growth of Visa card users in Niagara County, top market segments by spend, top originating countries by spend along with multiple other data points.

Top Originating Countries by Spend amount (\$M US)



Top Market Segments by Spend Amount (\$M US)



BRAND USA SOCIAL MEDIA CAMPAIGN: SPRING 2018

Brand USA's @beautifuldestinations campaign included five of China's largest social media platforms: Weibo, Miaopai, Toutiao, Netease, and Pear. Niagara Falls USA was featured as part of this campaign with one of our short video assets highlighting active, outdoor adventure.

Total Performance Across All Platforms:



1,868,322 Video Views
261 comments

551 Likes
120 Shares

LEISURE GROUP SALES

Leisure Group Sales focuses their efforts on increasing motor coach business to Niagara County while providing support to groups that are in the destination.

TOURS



80

Overnight Groups

Estimated Economic Impact:
\$1,256,164



41

Day Trips

Estimated Economic Impact:
\$174,827



9

Additional Groups Assisted

Estimated Economic Impact:
\$103,755

TOTAL = 130 GROUPS*



TOTAL ESTIMATED ECONOMIC IMPACT=

\$1,534,746[§]

TRADESHOWS

Heartland Post-FAM

In February 2018, the Heartland Travel Showcase was hosted in Buffalo, NY. After the Showcase, we hosted a Niagara Falls USA Post-FAM of 27 attendees.

The Results:

7 additional group trips booked

257 room nights

246 Appointments

9 Domestic Tour Operator
Tradeshows Attended

EI: \$118,806

Return on Investment – 7:1

[§]Above amount used in calculation of organization ROI on page 15.

*Motorcoach business booked by Destination Niagara USA Staff. Not all Motorcoach business is reported to our organization.

CONVENTION AND MEETING SALES

Convention and Meeting Sales will continue to grow the meetings market, attracting regional and national conferences along with New York State and National Associations.



20

Conventions/Meetings
Booked in 2018

Total Room Nights:

10,556

EI:

\$6,966,776^{*}

Convention Social Geo-Targeting

In 2018, we attended two tradeshows in Detroit and Nashville in which we ran social media geo-targeted ads of our 360° Video. The focus was a radius surrounding each Convention Center, host hotels and on meeting planner and event planner job titles and interests in event planning and event management. The ads drove users directly to the Conventions & Meeting page of our website.

The Results:

Total Impressions: **162,402**

Total Paid Reach: **30,802**

Total Link Clicks: **623**

Return on Investment – 33:1

*Event Impact Calculator is provided by Destinations International, a professional organization representing destination marketing organizations worldwide. Calculations are based on meeting/event type, season, room and number of attendees. Above amount used in calculation of organization ROI on page 15.

NYC PLUS INITIATIVE

The goal of the NYC Plus partnership with NYC & Company was to draw more interest in the NYC area for a family vacation and to inspire visitors to incorporate a trip to Niagara Falls USA, leveraging our proximity to NYC when choosing to fly. The campaign was promoted across multiple channels including a dedicated content program on nycgo.com and OOH (out of home) media in Boston and Chicago.

The Results:

TWO EMAIL CAMPAIGNS

JUNE 2018:



Sent to
355,922
subscribers



Open Rate
15.8%
(56,275 unique opens)

SEPTEMBER 2018:



Sent to
343,405
subscribers

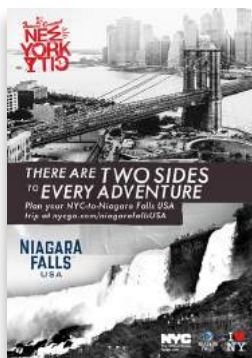


Open Rate
17.6%
(60,185 unique opens)

NYCGO.COM

Total Impressions Generated: **365,000**
(74% Domestic/26% International)

Total Page Visits: **35,120**



Top Markets:

New York City
Boston
Washington DC
Hartford/New Haven
Chicago

PRINT WORTHY

We produce several collateral pieces providing inspiration to visit or book a group/meeting in Niagara Falls USA. They motivate and encourage people to visit and explore Niagara County.



Travel Guide

With a circulation of more than 500,000, the Travel Guide provides an in-depth platform on which to tell the real story of Niagara Falls USA inspiring visitors from all over the world along with a two page augmented reality feature.

Tour Planner

This sales tool is used for both domestic and international tour planners. It provides information including suggested itineraries and businesses that are group-friendly, encouraging planners to book in the destination.

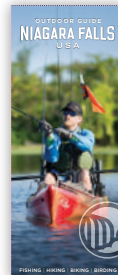


Meeting Planner Guide

As we continue to grow our meetings and convention business, our Meeting Planner Guide provides the tools needed to consider booking a meeting in Niagara Falls USA, including room specifications and unique venues in the region.

Outdoor Adventure Guide

As we continue to build on our Niagara Falls USA, Where Adventure Comes Naturally brand, we created The Niagara Falls USA Outdoor Guide featuring year-round fishing, birding, hiking and biking opportunities. This guide is distributed at outdoor consumer shows as well as our Visitor Center and is a popular planning tool for our in market visitor.



OUTDOOR PROMOTIONS

Niagara Falls USA is known for the wide variety of outdoor adventure it has to offer—and we're making sure that it is well known. From articles in national publications to hosting national events, we are recognized as a destination of choice for outdoor enthusiasts everywhere.

Publications

TV, radio, digital and print advertising in key markets have increased our exposure in publications including Great Lakes Angler, Outdoor Guide, Lake Ontario Counties Trout and Salmon Newspaper, NY Outdoor News Newspaper, Lake Ontario United, On The Water WLVL, WBEN & The Fisherman Magazine.

The Outdoor Beat

This LCTV show, hosted by Bill Hilts, Jr. completed its fourth full year and is one of the most popular outdoor shows in Western New York.

Fishing & Outdoor Expo

The 5th Annual Greater Niagara Fishing and Outdoor Expo was held at the Conference and Event Center Niagara Falls and saw a ten percent increase in attendance. Booth space from vendors was sold out and this provided additional overnight stays in Niagara Falls hotels, generating revenue for local businesses in January, a typically slower month.



Derbies and Tournaments

We support the following tournaments with financial, marketing and physical resources.

34th Annual Lake Ontario Pro Am Salmon Team Tournament:

- 50 teams from around the Northeast
- Approximately 300 people in the destination for a minimum of three days

42nd Annual Greater Niagara Fish Odyssey Derby:

- Approximately 400 participants

Lake Ontario Counties Trout and Salmon Derbies:

- Three annual events (Spring, Summer, Fall)
- Approximate number of attendees:
 - » Spring: more than 4,000
 - » Summer: 3,000
 - » Fall: 7,000

Outdoor Media Relations Highlights:



453

Outdoor coverage across all media channels (print, television, online, etc.)



37

Visiting Media Hosted



395,474,677

Total number of media impressions



Confederation Internationale de la Pêche Sportive (CIPS) is an International Fishing Congress that we hosted May 10-13, 2018 in Niagara Falls USA. This was the first time it was ever held in the United States and allowed us to showcase the region, especially our fishery. Many of the delegates in attendance participated in pre- and post-Congress angling tours.

BUFFALO NIAGARA FILM COMMISSION

The Buffalo Niagara Film Commission promotes film production throughout WNY. These numbers reflect only Niagara County.



18

Completed Productions



17

Completed Scouts
& Inquiries

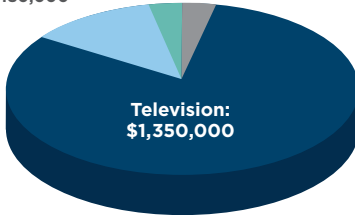


44

Production Days

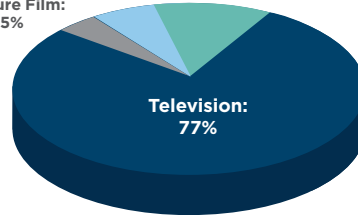
Local Spend By Type

Still Photography: \$180,000
Documentary: \$30,000
Feature Film: \$30,000



Production Days By Type

Still Photography: 7%
Documentary: 11%
Feature Film: 5%



TOTAL ESTIMATED ECONOMIC IMPACT

\$1,600,000^{\$}

Return on Investment – 32:1

Totals determined by production reports, and AFCI calculations based upon industry accepted totals including production day counts, production type, and crew member counts in Niagara County

^{\$}Above amount used in calculation of organization ROI on page 15.

BOARD & COMMITTEES

2018 Destination Niagara USA Board of Directors

Name	Business	Category
Carol Calato	Calato Manufacturing	General Business
John DiGuiseppe	Platter's Chocolates	General Business
Mark Laurrie	Niagara Falls City Schools	General Business
Lucy Muto	M&T Bank	General Business
Lynn Oswald	Small Business Development Center	General Business
Doug Nickerson	American Niagara Hosp/Sheraton Niagara Falls	Hospitality/Tourism
Melissa Free	Seneca Gaming Corporation	Hospitality/Tourism
Galeb Rizek	Econo Lodge	Hospitality/Tourism
Lou Paonessa	NYPA - Niagara Power Vista	Hospitality/Tourism
Brett Stewart	Merani Hotel Group	Hospitality/Tourism
Mayor Paul Dyster	City of Niagara Falls	Investor Appointment
Mayor Anne McCaffrey/Mayor Dave Wohleben	City of Lockport	Investor Appointment
Richard Updegrove	Niagara County Legislature Representative	Investor Appointment
Angela Berti	NYS Parks (Permanent Seat)	Ex-Officio/Non-Voting
Mark Mistriner	NCCC/Culinary Institute/Hospitality	Ex-Officio/Non-Voting
John Percy	Destination Niagara USA	Ex-Officio/Non-Voting
Paul Tronolone	USA Niagara Development	Ex-Officio/Non-Voting
Dr. Kurt Stahura	Niagara University	Ex-Officio/Non-Voting

Committees

Executive	Brett Stewart	Galeb Rizek	Lynn Oswald	Lucy Muto
Title	Chair	Vice Chair	Treasurer	Secretary

Finance
Galeb Rizek
Lucy Muto
Doug Nickerson
Lynn Oswald
Carol Calato
Mark Laurrie
Brett Stewart

Nominating
Lucy Muto
Galeb Rizek
Mark Laurrie
Seth Piccirillo
Brett Stewart

FINANCE

2018 Financial Summary*

Revenue		% of Revenue
Niagara Falls Bed Tax	\$2,391,154	61.5%
Lockport Bed Tax	\$75,268	1.9%
Niagara County Bed Tax	\$236,367	6.1%
Business Generated Revenue	\$843,195	21.7%
Grants	\$342,874	8.8%
Casino Revenue	\$0	
Total	\$3,888,857	

Expenses		% of Revenue
Personnel	\$1,296,910	29.5%
Marketing	\$2,293,688	52.3%
Group Leisure	\$98,547	2.2%
Convention and Meeting	\$138,016	3.1%
International Markets	\$111,764	2.5%
Visitor Services	\$179,270	4.1%
Outdoor Promotion	\$85,501	1.9%
General and Administration	\$185,826	4.2%
Total	\$4,389,522	

Overall Organization ROI – **21:1**

Hotel Data

SMITH TRAVEL RESEARCH DATA (STR REPORT)



\$115.19

Average Daily Rate
(1.2% increase from 2017)



57%

Occupancy
(.08% decrease from 2017)



\$65.65

REVPAR
(.49% increase from 2017)

SUPPLY:

1,187,692

(8% increase from 2017)

DEMAND:

676,923

(7.1% increase from 2017)

*Interim unaudited statements

Destination Niagara USA

Our Mission: We are a private non-profit with a mission to expand the economic prosperity of the Niagara Falls USA communities by generating individual and group visitation.



Positioning Statement: For those who would rather go and do rather than just see, Niagara Falls USA is the embodiment of America's adventurous spirit, connecting people to nature through immersive experiences that move, challenge and inspire them.