



### Niagara Falls, NY 2017 Visitor Research



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#### Introduction

- ✓ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ✓ In 2007, our proprietary Longwoods Travel USA® program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ✓ It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ✓ This report provides an overview for Niagara Falls' domestic tourism business in 2017.



#### Research Objectives

- ✓ The visitor research program is designed to provide:
  - ✓ Estimates of domestic overnight and day visitor volumes to Niagara Falls, NY.
  - ✓ A profile of Niagara Falls' performance within its overnight travel market.
  - ✓ Domestic visitor expenditures in Niagara Falls, NY.
  - ✓ Profiles of Niagara Falls' day travel market.
  - ✓ Relevant trends in each of these areas.



#### Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA®** survey:
  - Selected to be representative of the U.S. adult population
- For the 2017 travel year, this yielded:
  - > 329,470 trips for analysis nationally:
    - > 232,317 overnight trips
    - > 97,153 day trips
- For Niagara Falls, the following sample was achieved in 2017:
  - > 745 trips:
    - > 444 overnight trips
    - 301 day trips (2016 and 2017 combined sample)
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

#### **Analytical Note**

- The results of this report are based on two time frames:
  - ➤ Niagara Falls overnight data and all U.S. norms are reported for the 2017 travel year.
  - > To maximize statistical reliability, day data are based on two years' combined sample from 2016 and 2017







## **Key Findings**



#### **Key Findings**

- ➤ In 2017, Niagara Falls, NY had 7.6 million person trips, increasing 3.3% from 2016. 46% were overnight trips and 54% were day trips.
- ➤ The overnight trips generated \$694 million in spending, increasing 4.1% from 2016.
- When asked about the main purpose of their overnight trip, 28% responded that they were visiting friends and relatives, while 61% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip types were touring through the region and city trips.
- The top states of origin for visitors on overnight trips to Niagara Falls were New York, California and Ohio. The top DMA's of origin were New York City, Cleveland and Boston.



#### **Key Findings (Cont'd)**

- Almost three quarters (73%) of visitors on an overnight trip to Niagara Falls were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were sightseeing/attractions at 70% and friendliness of the local people at 59%.
- Among those on overnight trips to Niagara Falls, 61% have visited Niagara Falls at least once before and 35% have visited in the past 12 months.
- Overnight trips to Niagara Falls tend to be planned further in advance of travel than the national average 57% of overnight trips to Niagara Falls were planned more than two months ahead vs 51% nationally.
   35% of overnight trips were planned less than two months ahead, while only 8% of overnight trips to Niagara Falls were not planned ahead at all vs 14% nationally.
- ➤ Online travel agencies, advice from friends/relatives and destination websites were the most common planning sources for a Niagara Falls overnight trip. Online travel agencies and hotel/resort were the most common booking sources.



#### **Key Findings (Cont'd)**

- ➤ The average number of nights spent in Niagara Falls on an overnight trip was 2.4 nights, up from 2.3 nights in 2016. The average travel party size was 3.3 persons.
- Over half (60%) of overnight Niagara Falls travelers arrived by personal car or truck, but visitors are also more likely to use a rental car during their visit than the national average (28% vs 17%).
- The top activities and experiences engaged in during an overnight trip to Niagara Falls were shopping, visiting a state/national park, visiting a landmark/historic site visits, going to a museum or to a casino.
- Overnight visitors to Niagara Falls are more likely to travel with family and friends than to travel alone.



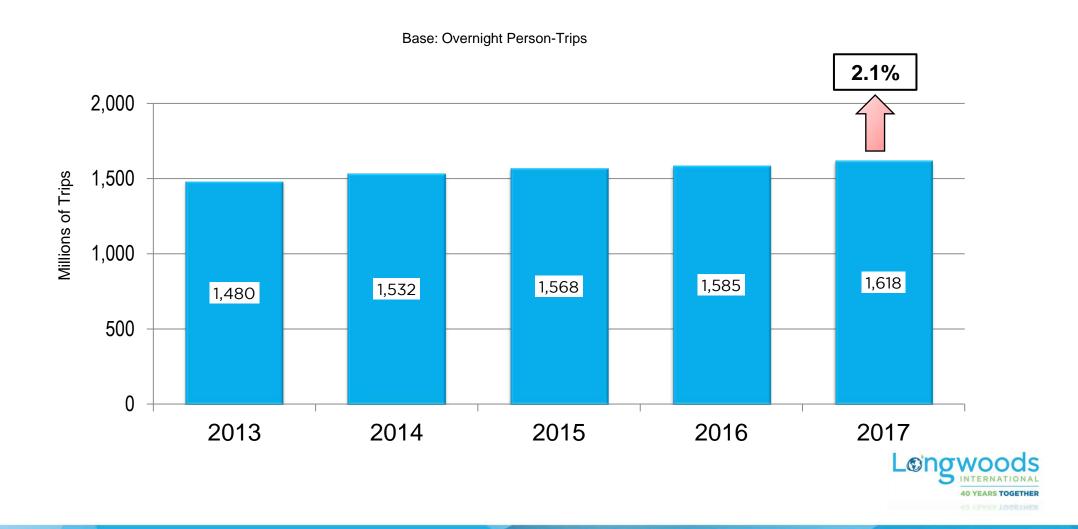




## Size & Structure of the U.S. Travel Market

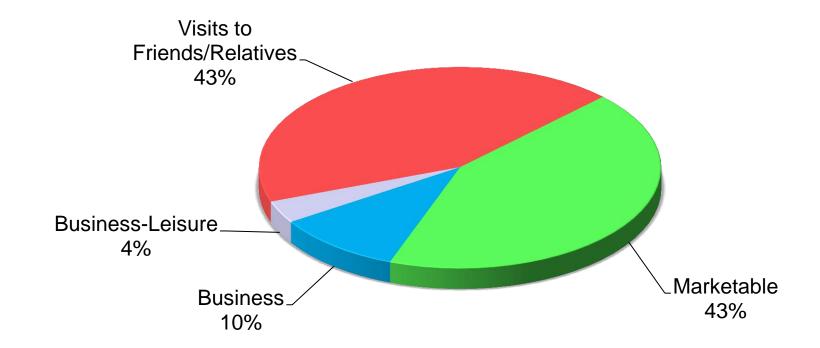


## Total Size of the U.S. Travel Market — 2013-2017



## Structure of the U.S. Travel Market — 2017 Overnight Trips

Base: Overnight Person-Trips





## U.S. Market Trends for Overnight Trips — 2017 vs. 2016

All Overnight Trips 2 Visiting Friends/Relatives 5 Marketable Trips Business-Leisure Trips 3 **Business Trips** 2 -5 Percent Change

Base: Overnight Person-Trips



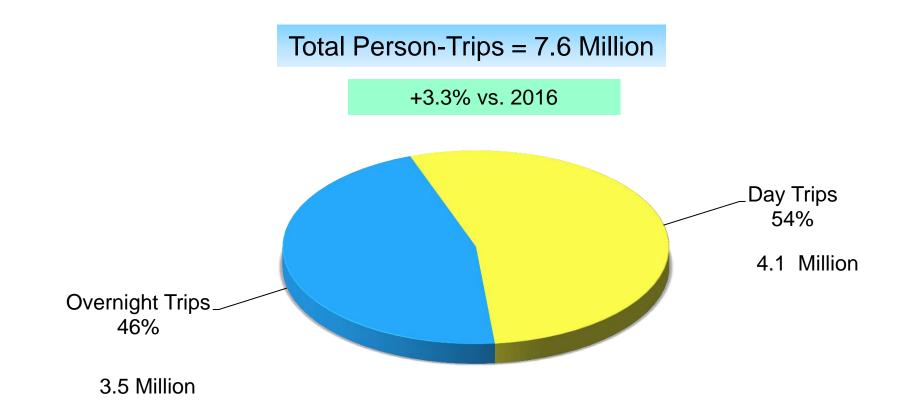




# Size & Structure of the Niagara Falls, NY Domestic Travel Market



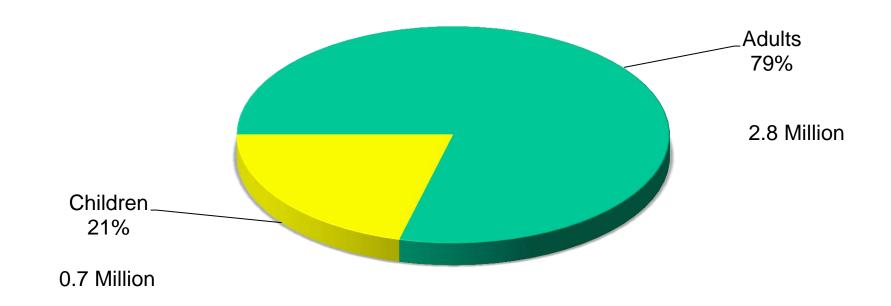
### Total Size of Niagara Falls, NY's 2017 Domestic Travel Market





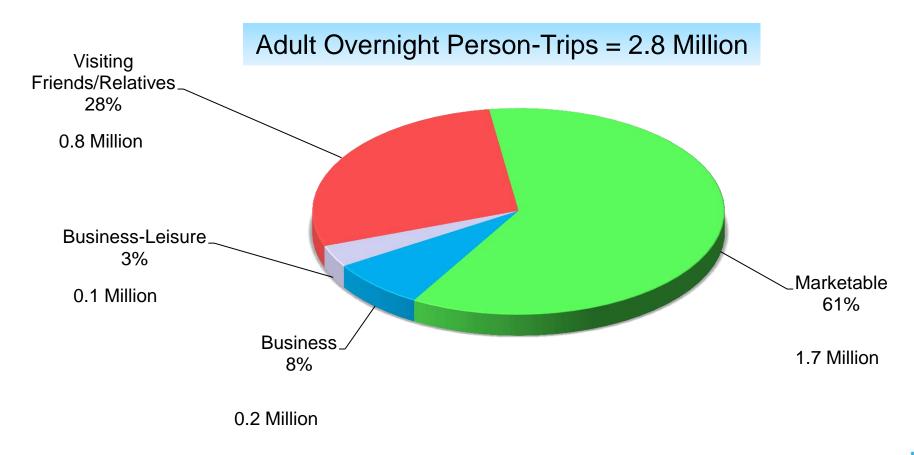
## Size of Niagara Falls, NY's Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 3.5 Million



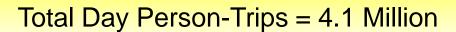


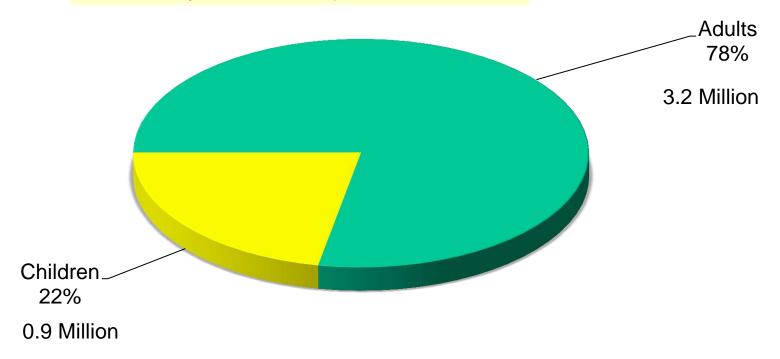
## Niagara Falls, NY's Overnight Travel Market — by Main Trip Purpose





## Size of Niagara Falls, NY's Day Travel Market — Adults vs. Children

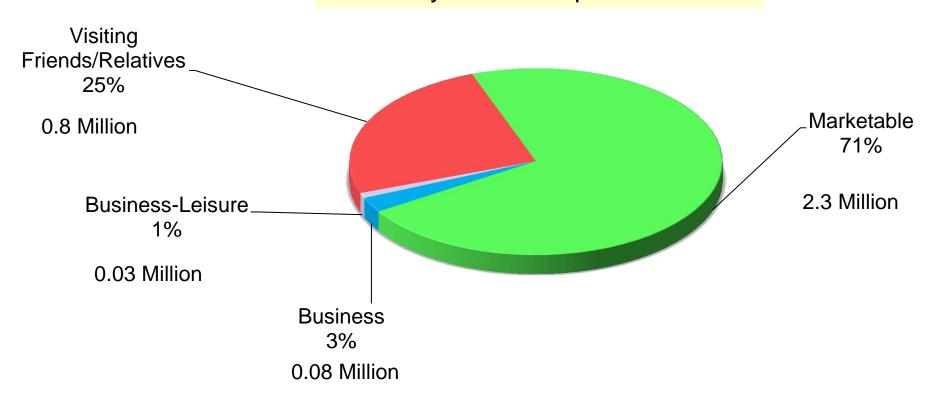






## Niagara Falls, NY's Day Travel Market — by Trip Purpose

#### Adult Day Person-Trips = 3.2 Million







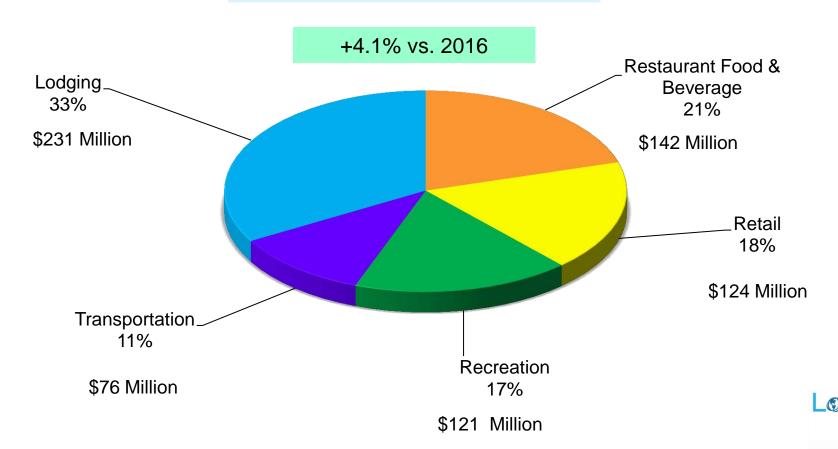


### Overnight Trip Expenditures

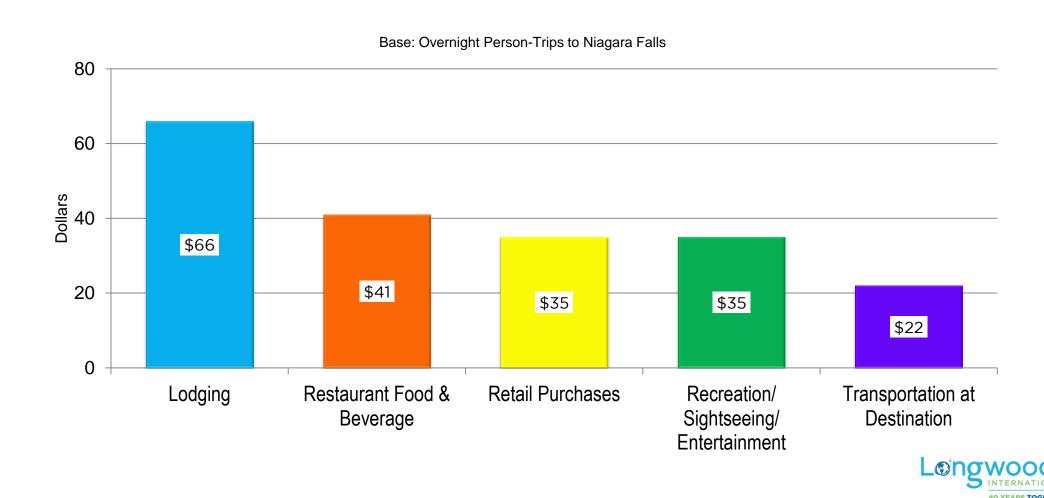


## Domestic Overnight Expenditures — by Sector

#### Total Spending = \$694 Million



## Average Per Person Expenditures on Domestic Overnight Trips — By Sector



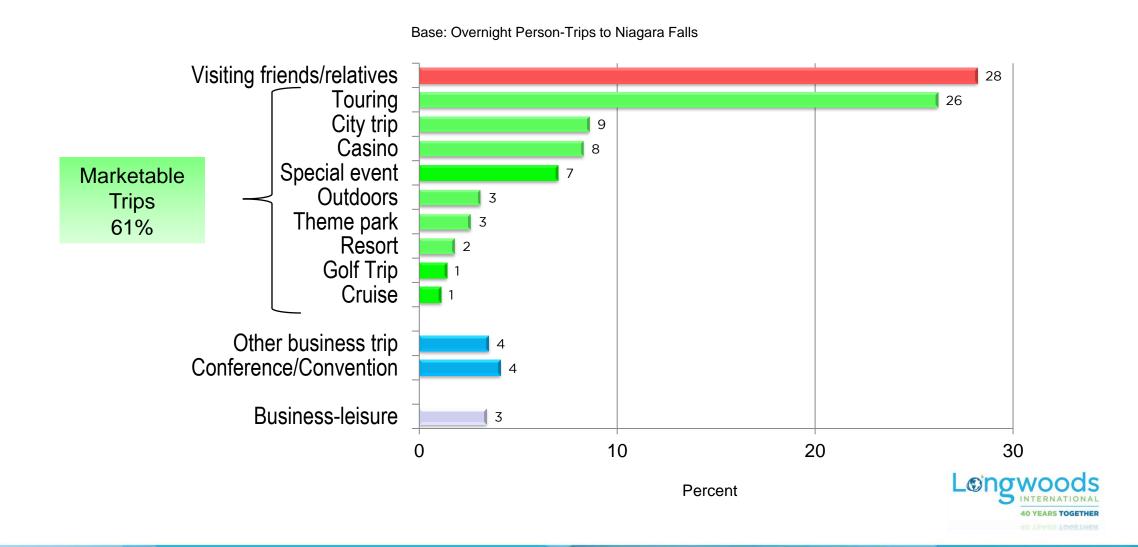




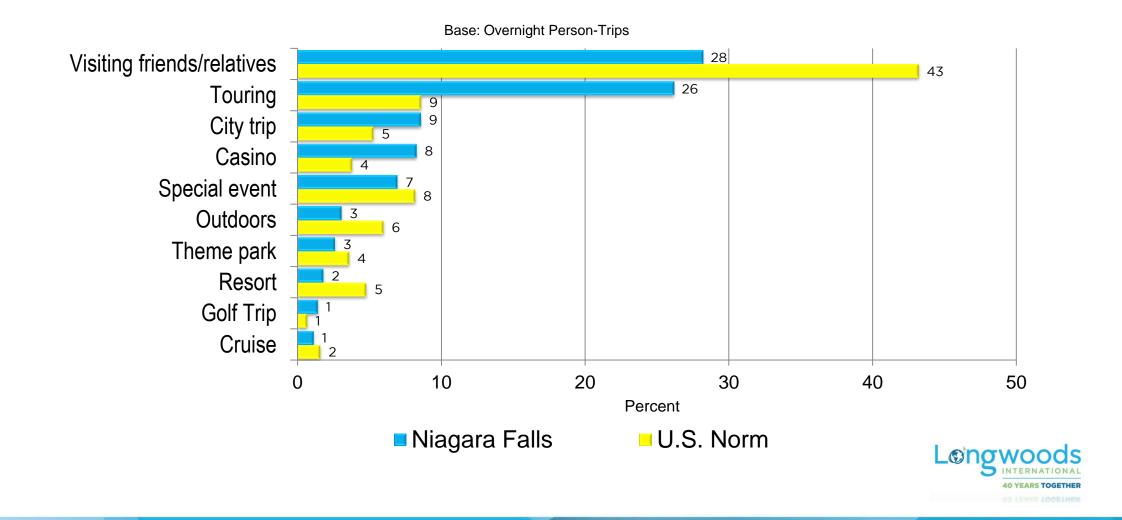
## **Overnight Trip Characteristics**



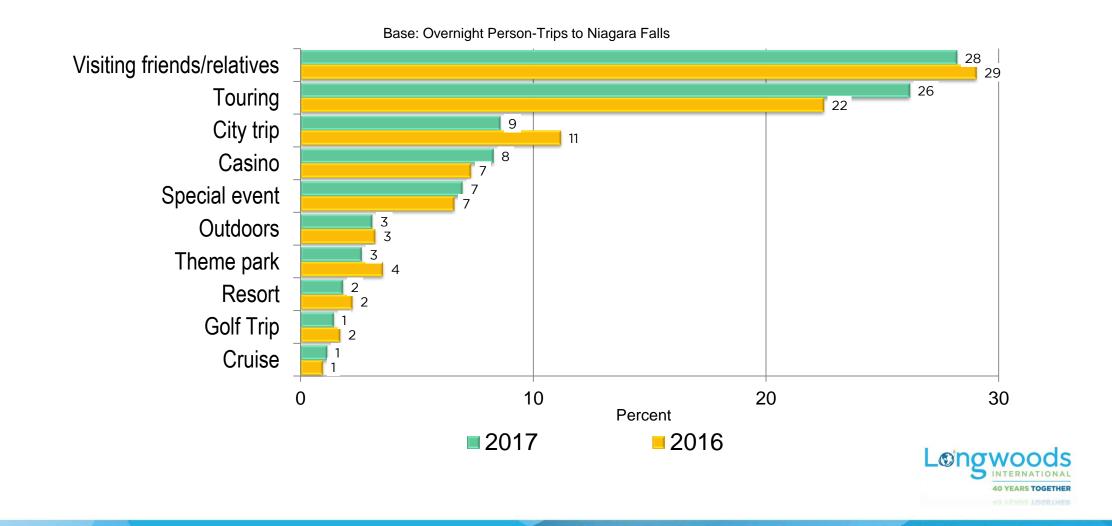
### Main Purpose of Trip



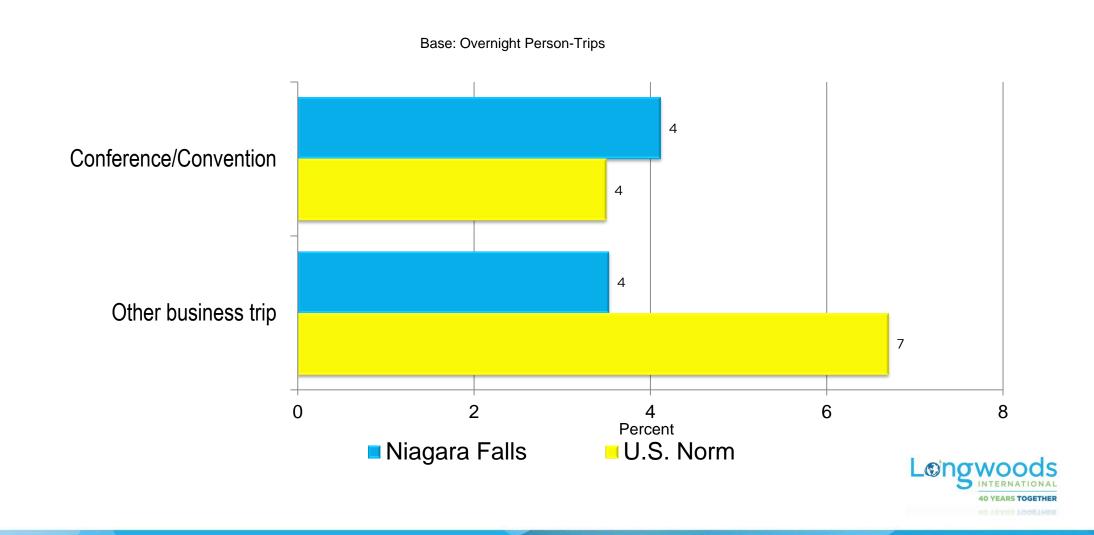
### Main Purpose of Leisure Trip



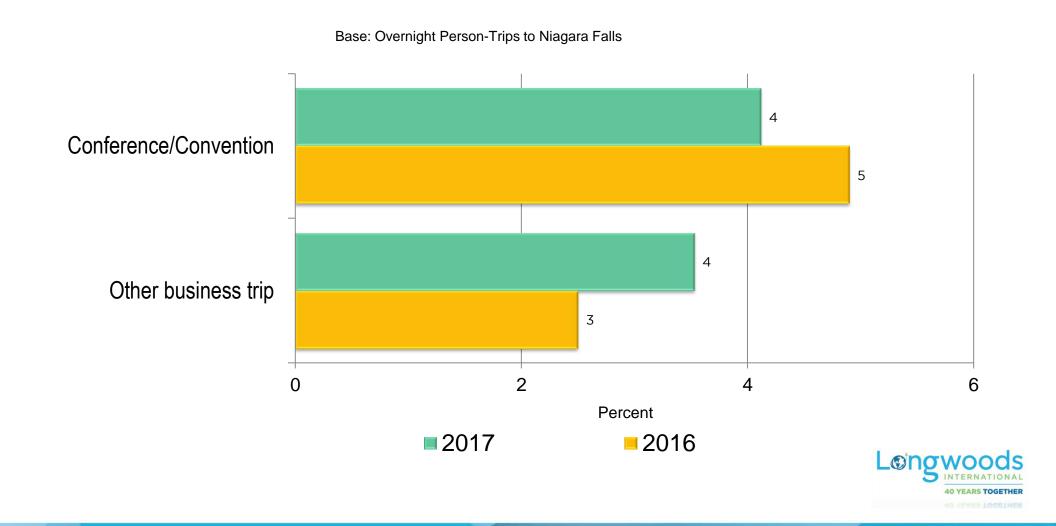
## Main Purpose of Overnight Leisure Trip — 2017 vs. 2016



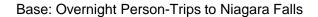
### Main Purpose of Business Trip

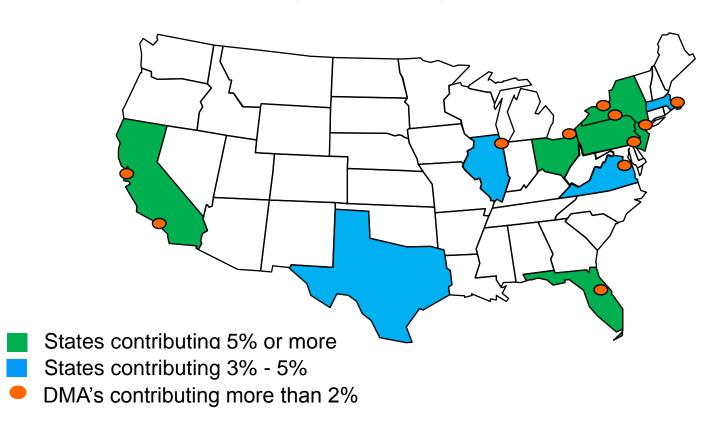


## Main Purpose of Overnight Business Trip — 2017 vs. 2016



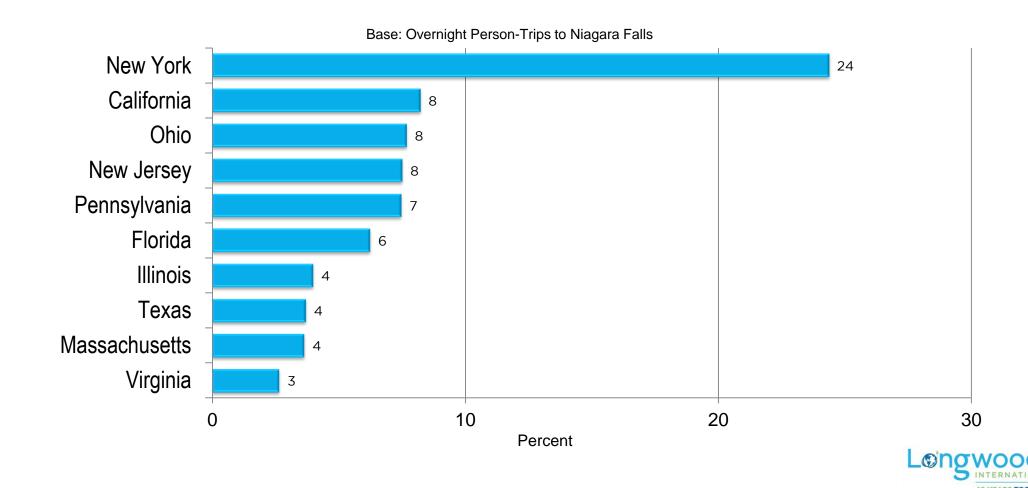
#### **Sources of Business**



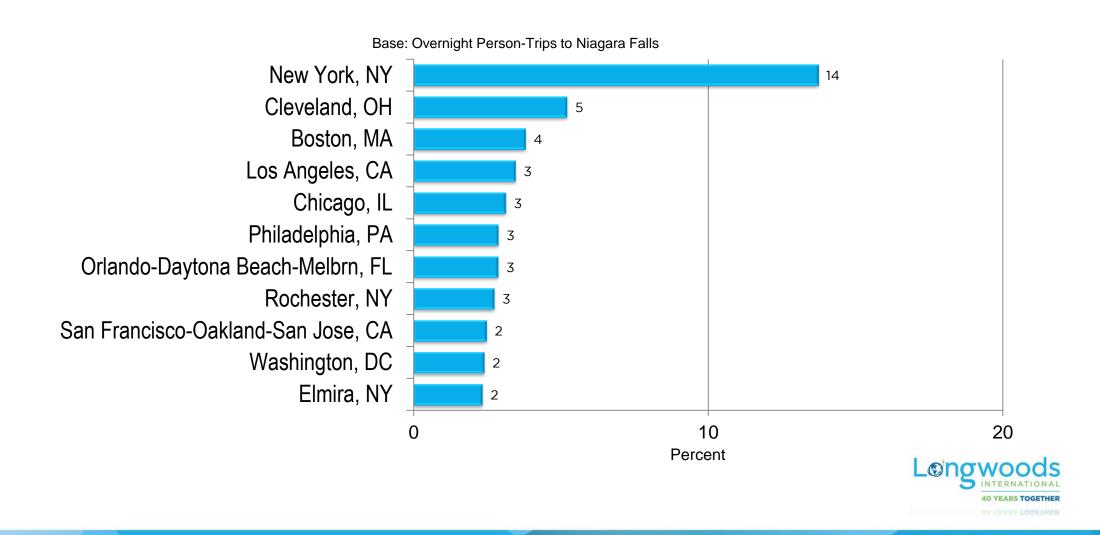




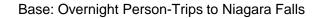
### **State Origin Of Trip**

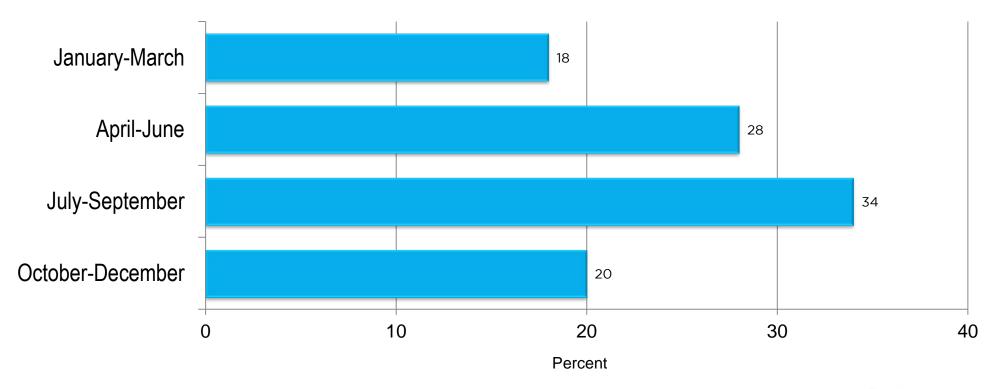


### **DMA Origin Of Trip**



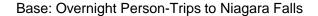
### **Season of Trip**

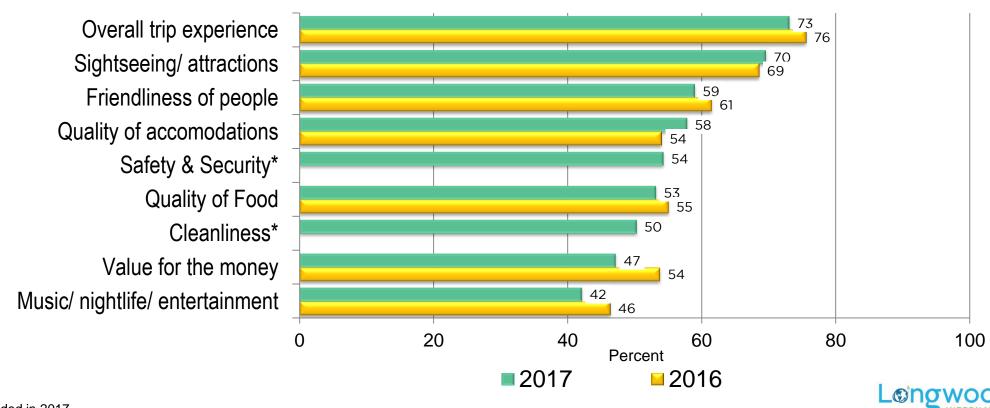






### % Very Satisfied with Trip\*\*

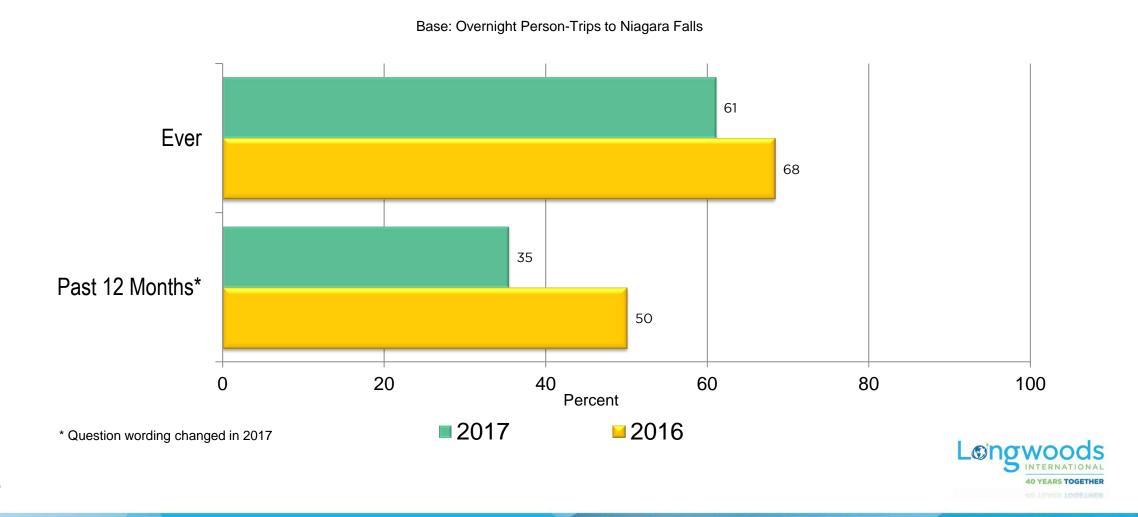




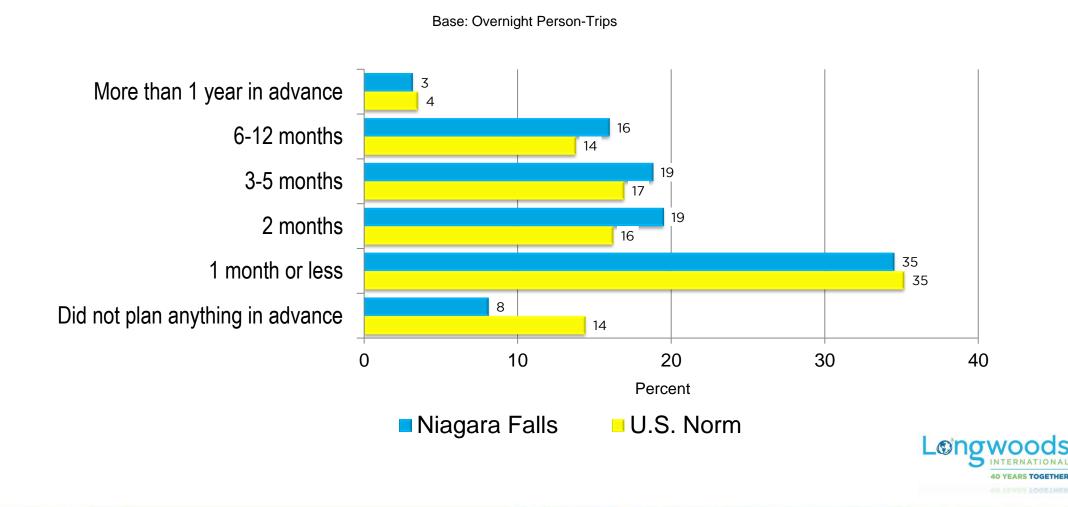
<sup>\*</sup> Added in 2017

<sup>\*\*</sup> Those who ranked their Niagara Falls experience a 5 on a 5-point scale

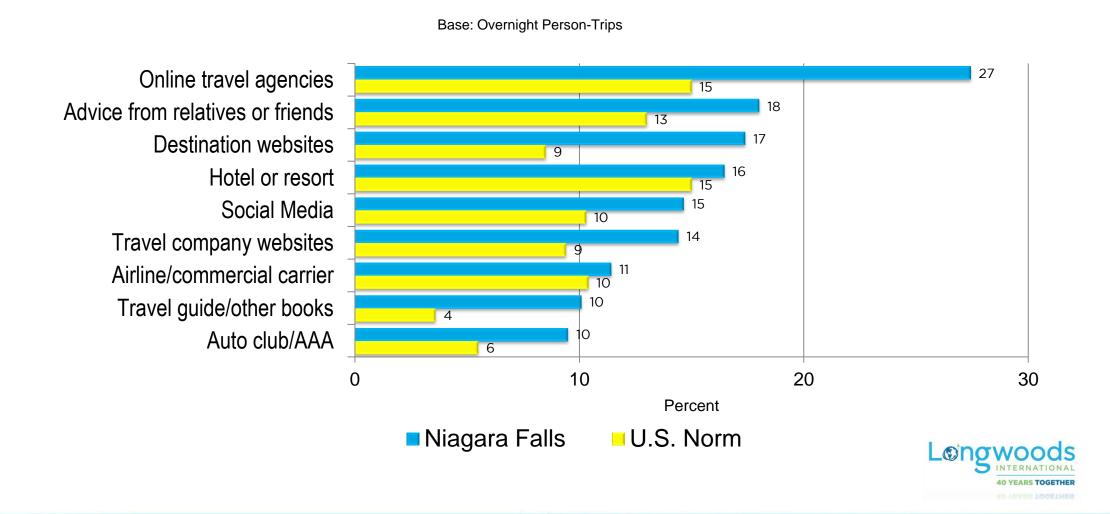
### Past Visitation to Niagara Falls, NY



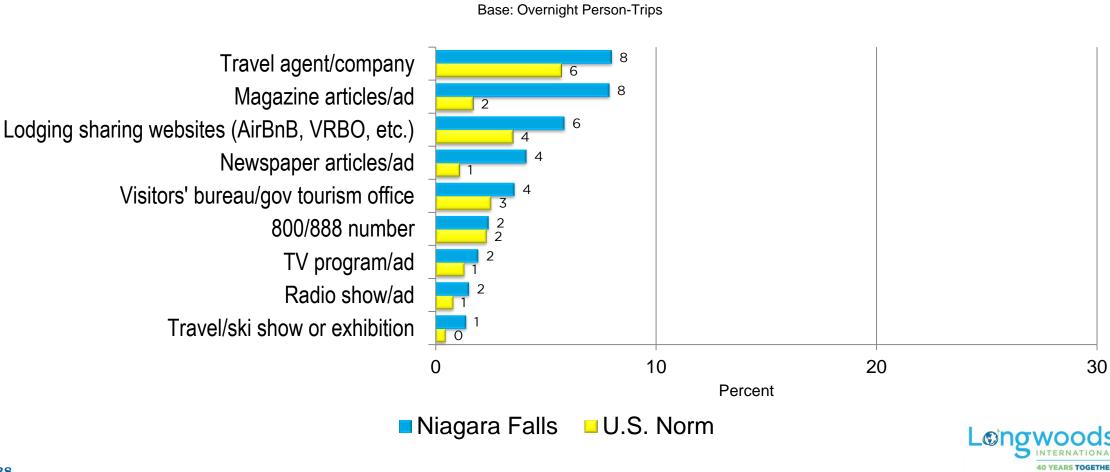
### Length of Trip Planning



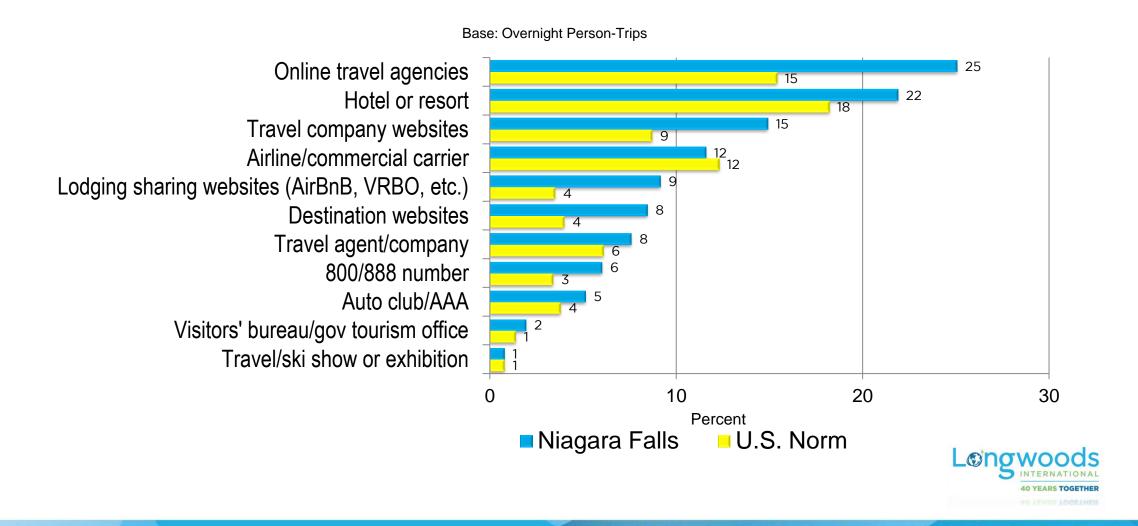
#### **Trip Planning Information Sources**



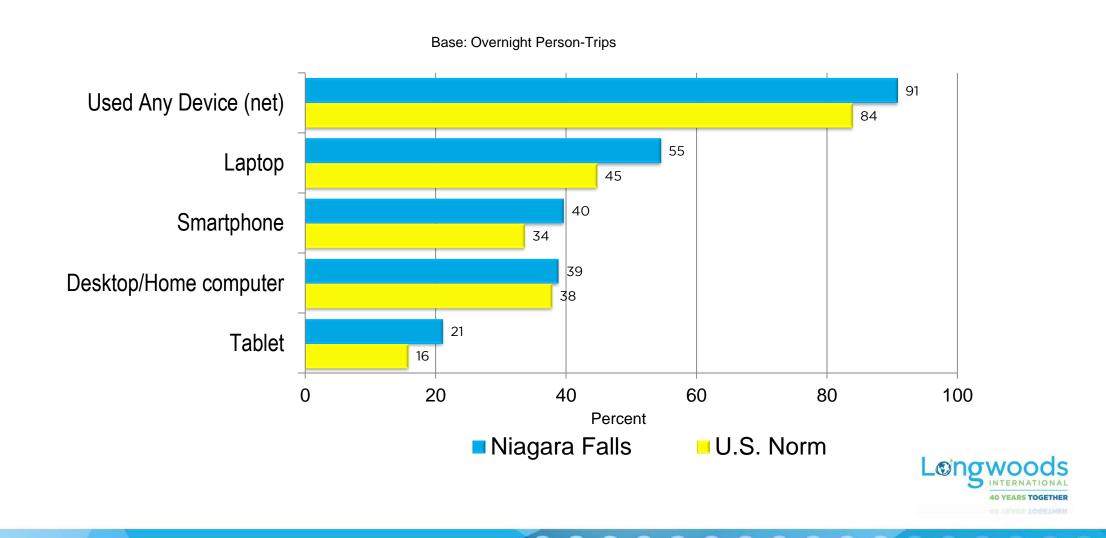
#### Trip Planning Information Sources (Cont'd)



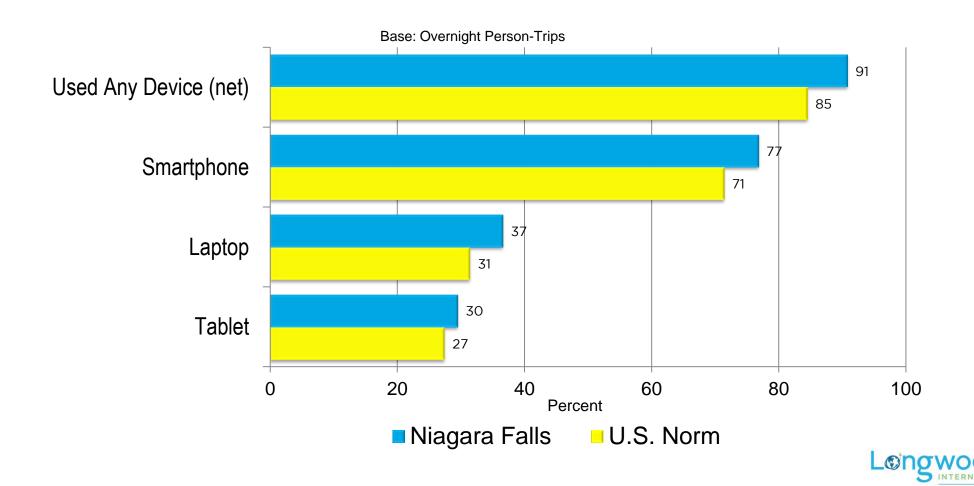
#### **Method of Booking**



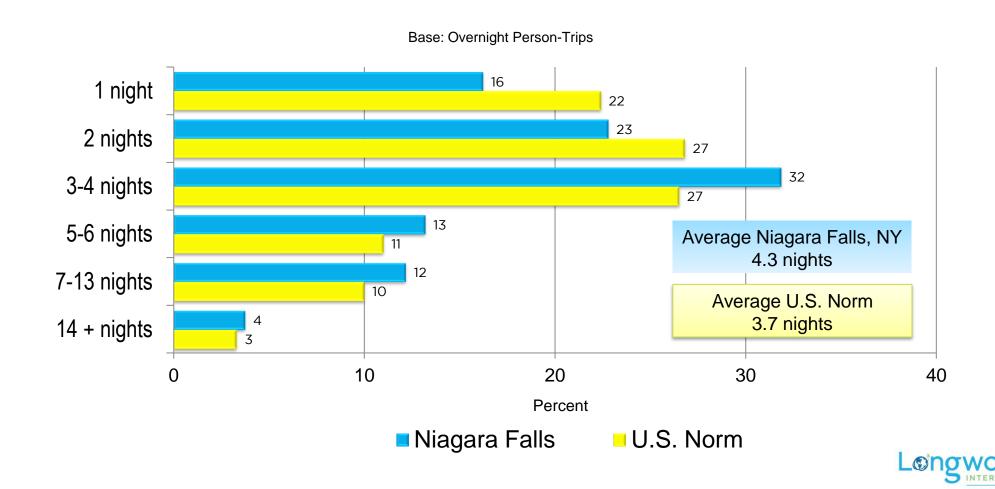
#### **Devices Used for Trip Planning**



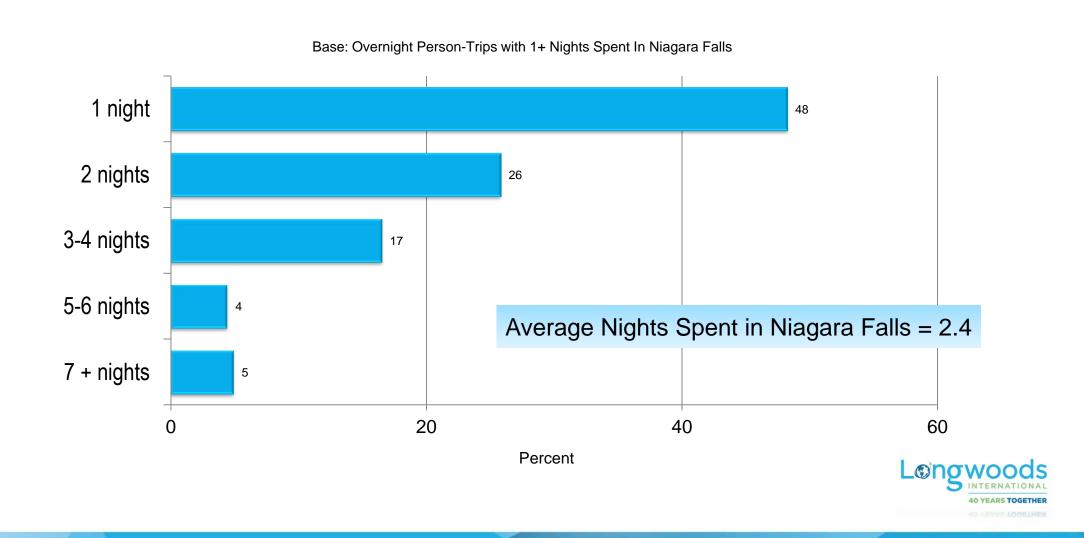
#### **Devices Used During Trip**



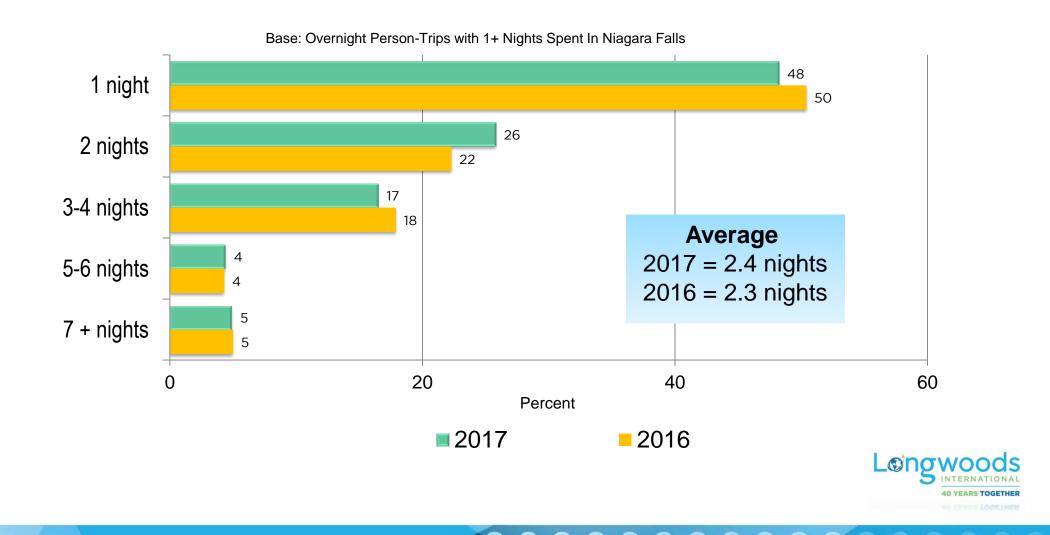
### **Total Nights Away on Trip**



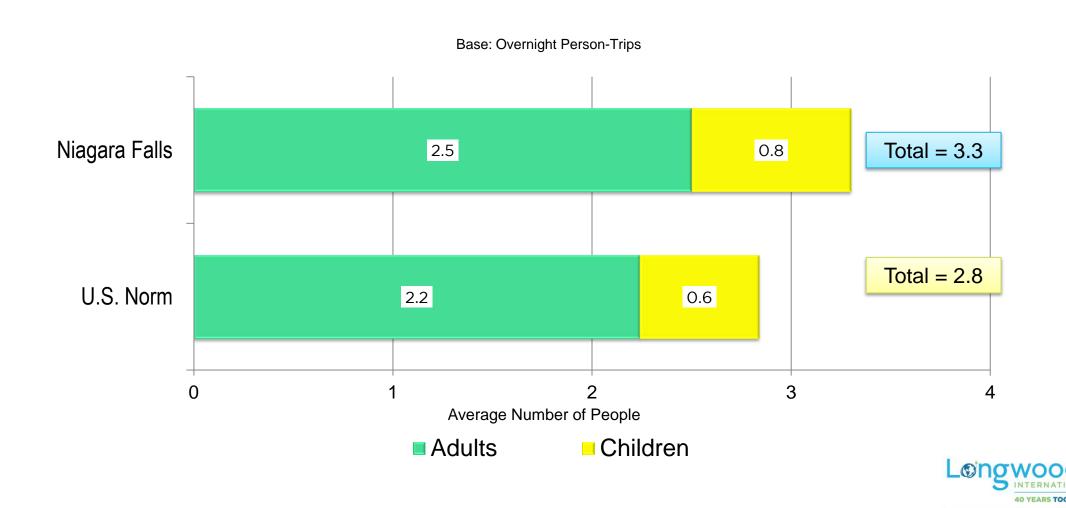
### Number of Nights Spent in Niagara Falls, NY



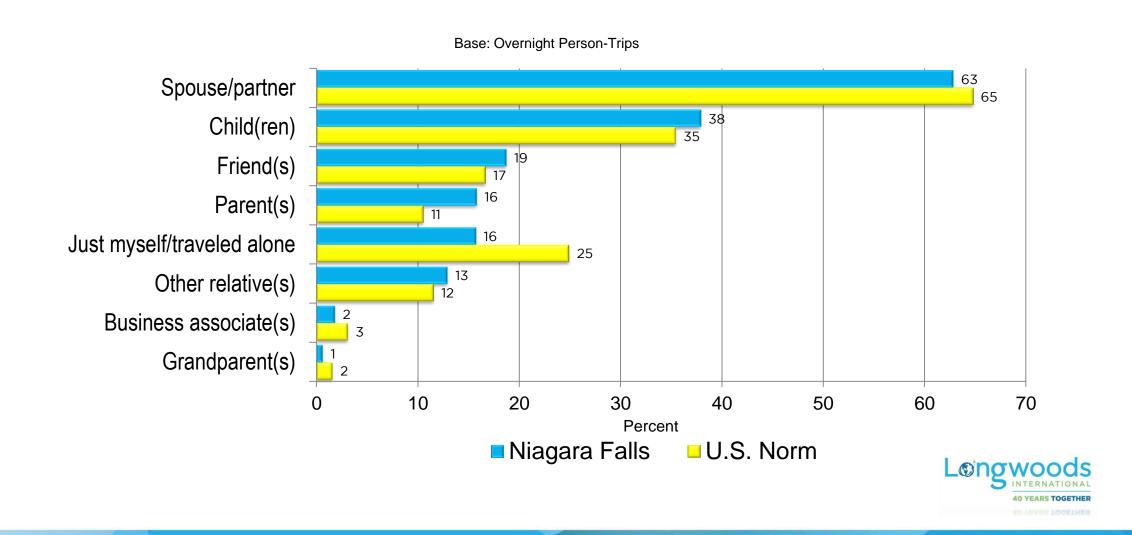
## Number of Nights Spent in Niagara Falls, NY - 2017 vs. 2016



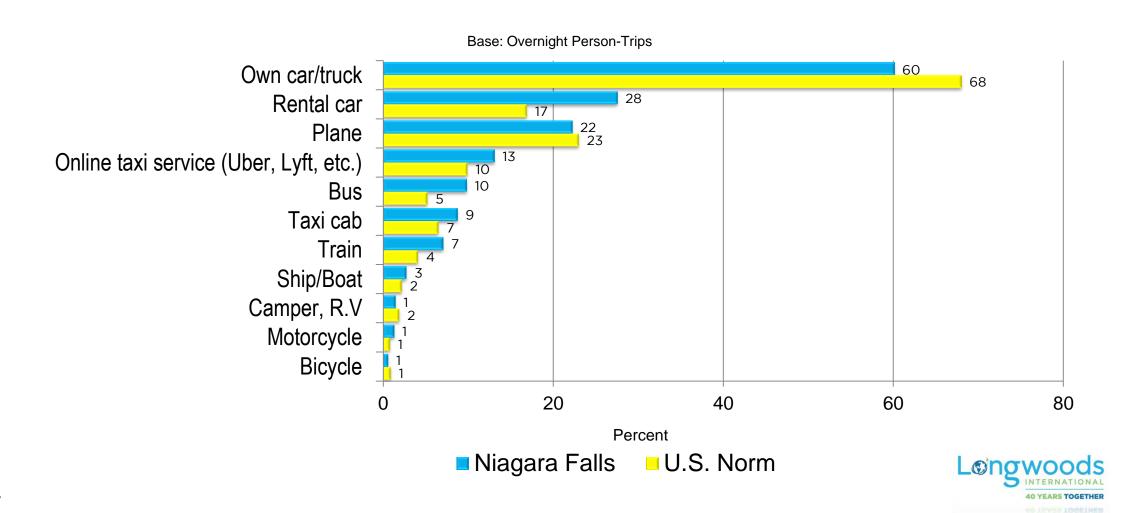
### **Size of Travel Party**



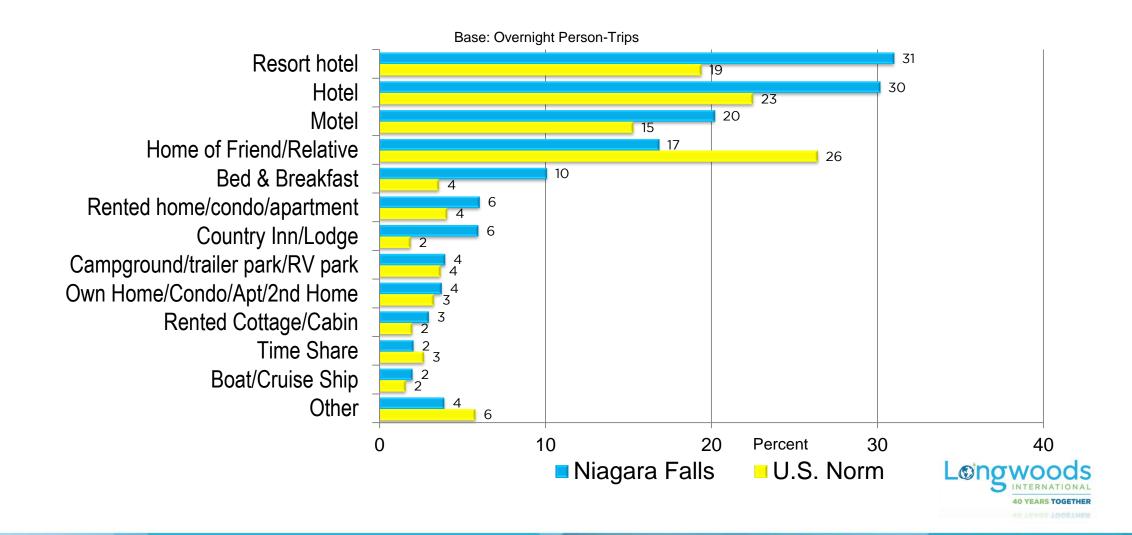
#### **Composition of Immediate Travel Party**



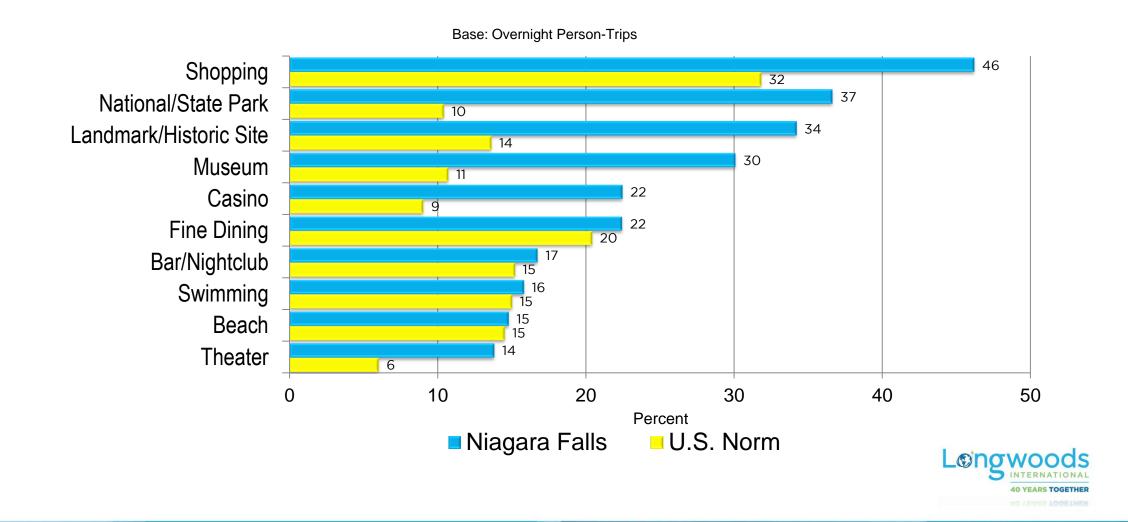
#### **Transportation**

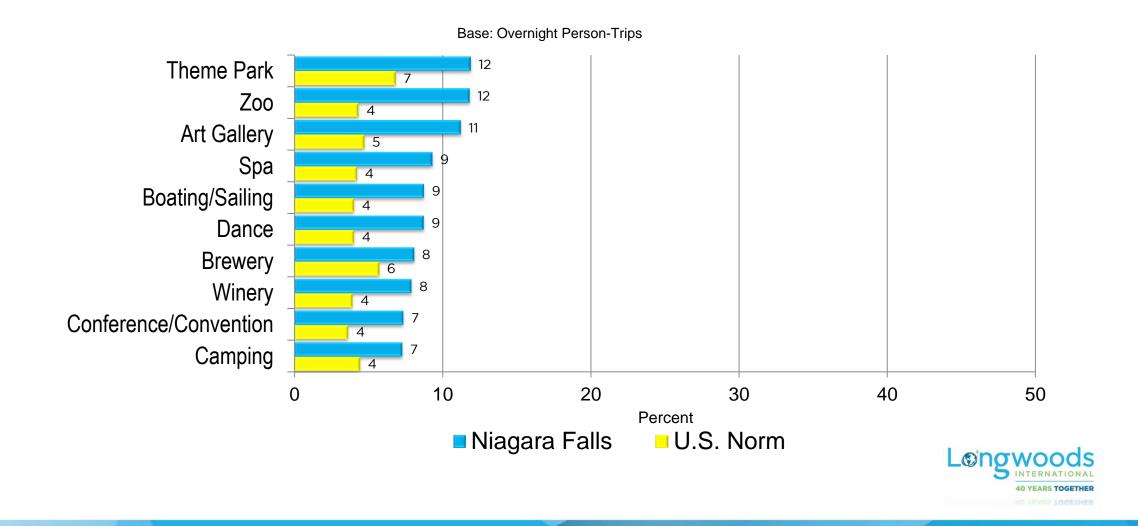


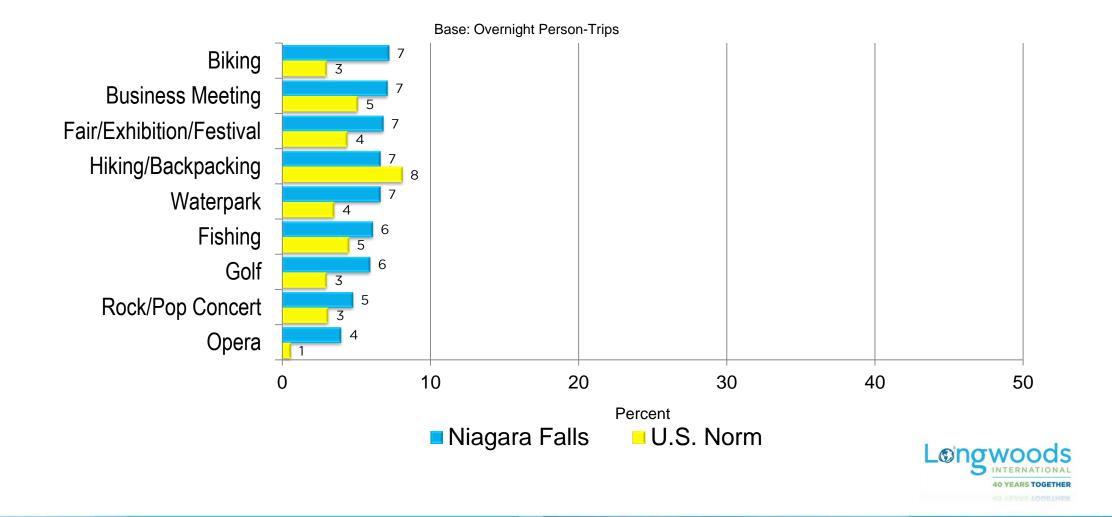
#### Accommodations

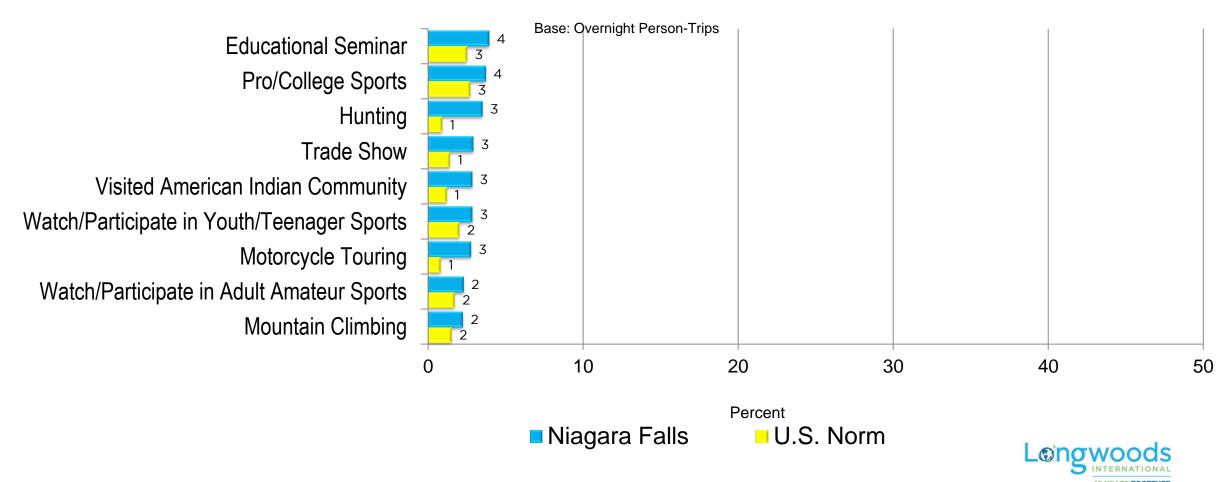


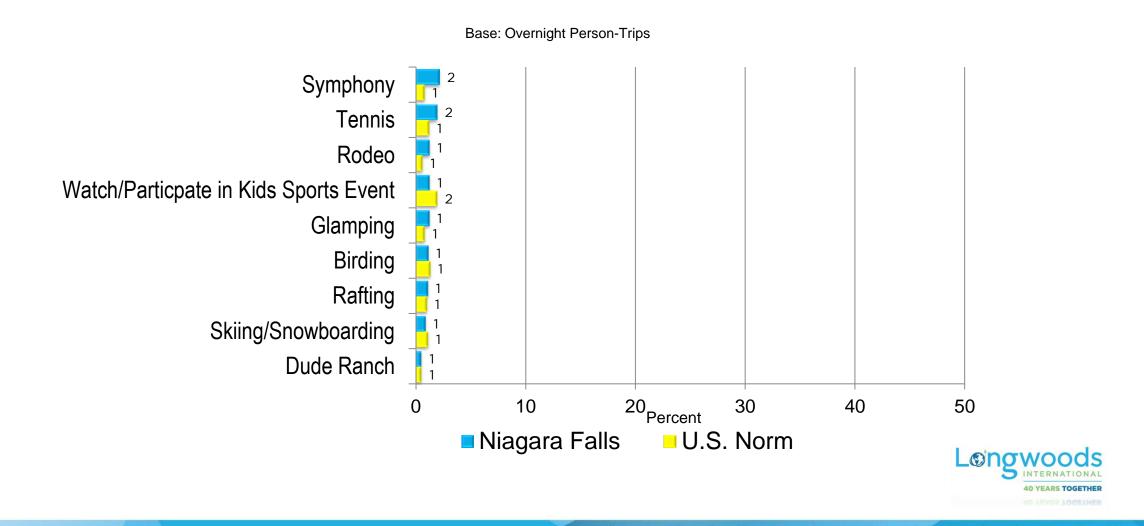
### **Activities and Experiences**



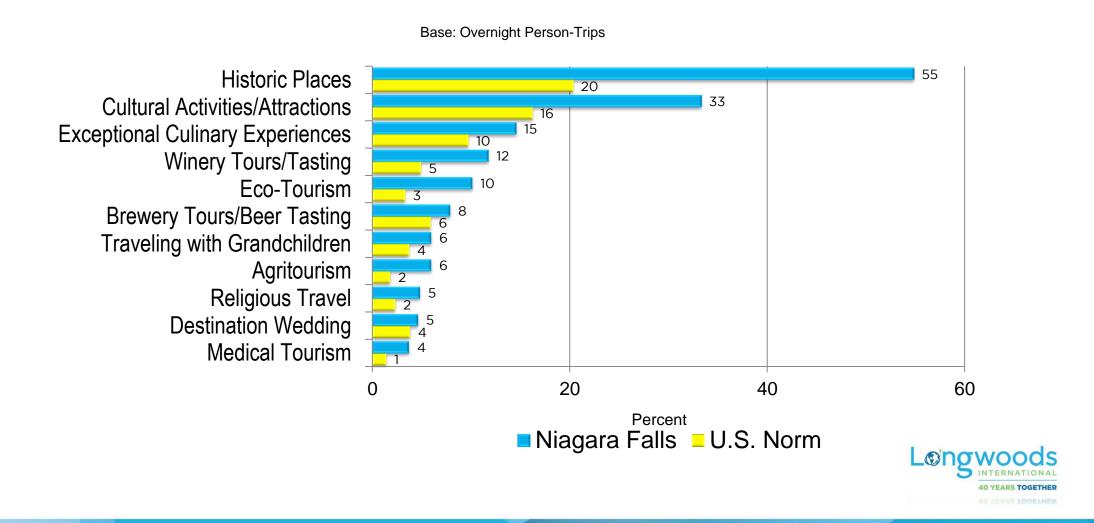




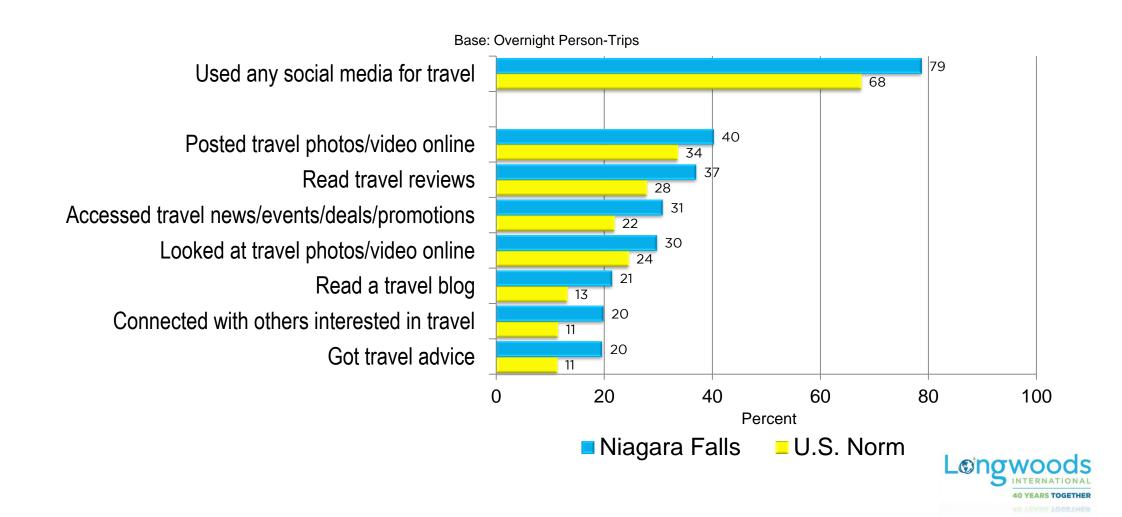




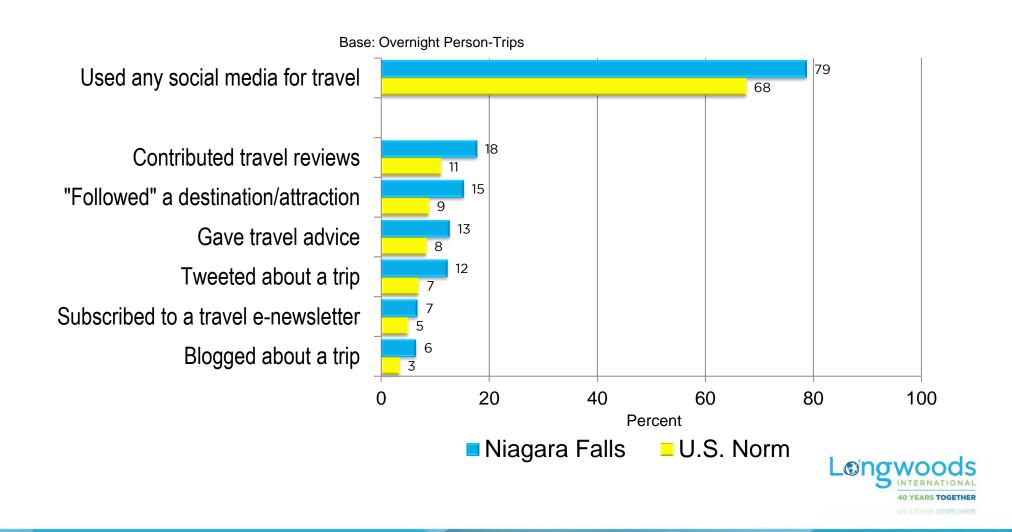
#### **Activities of Special Interest**



#### Online Social Media Use by Travelers

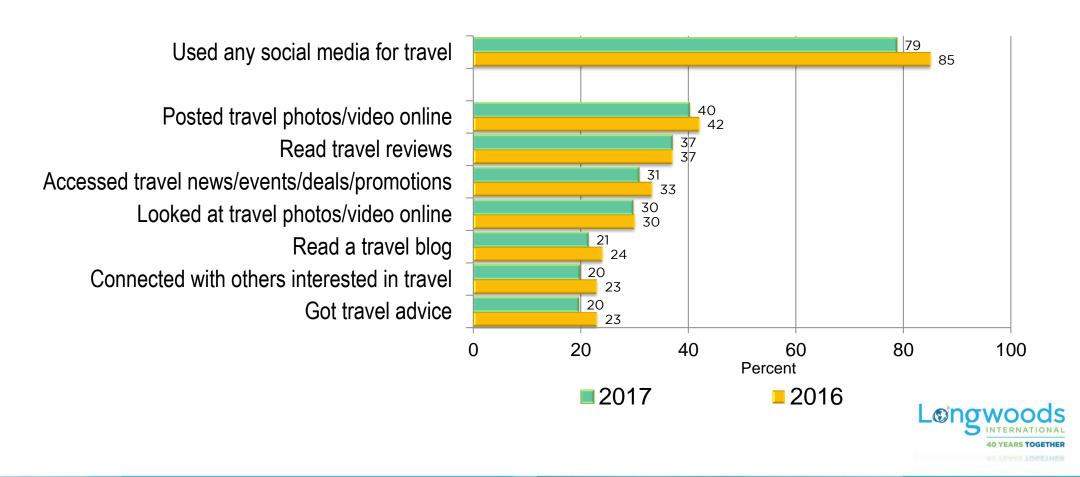


#### Online Social Media Use by Travelers (Cont'd)



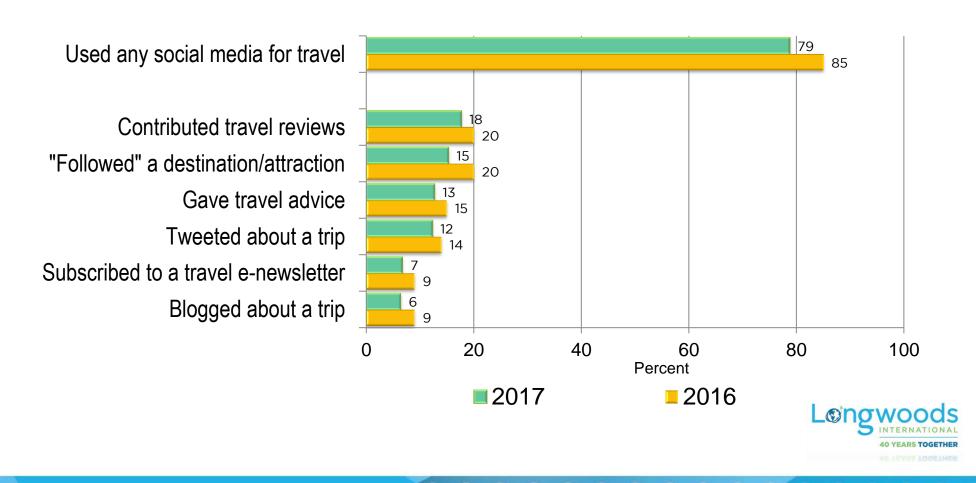
### Online Social Media Use by Travelers – 2017 vs. 2016

Base: Overnight Person-Trips to Niagara Falls

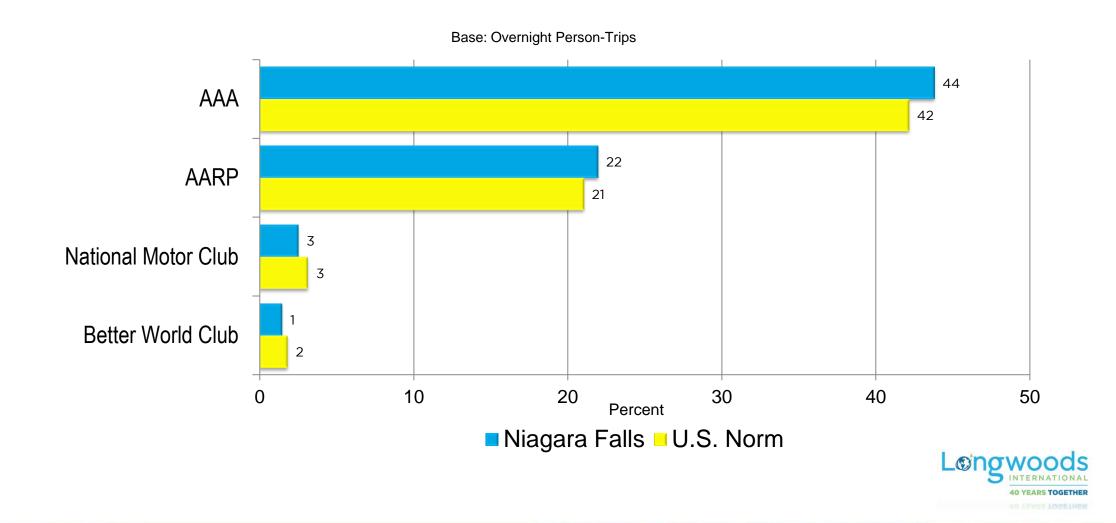


# Online Social Media Use by Travelers – 2017 vs. 2016 (Cont'd)

Base: Overnight Person-Trips to Niagara Falls



### **Organization Membership**



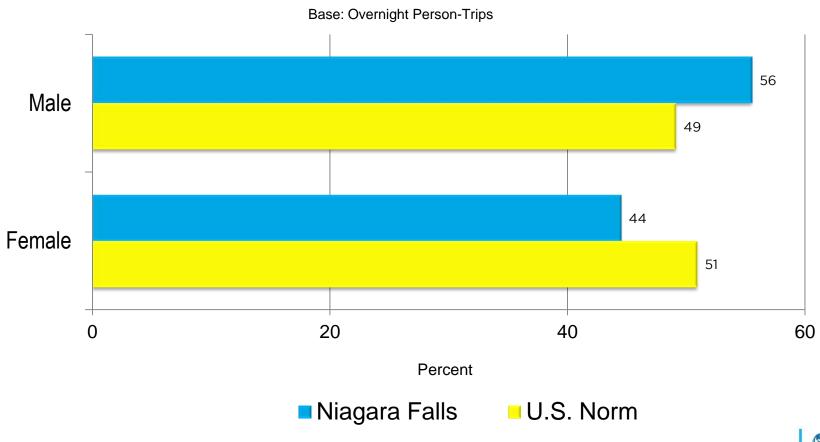




# **Demographic Profile**of Overnight Visitors

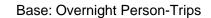


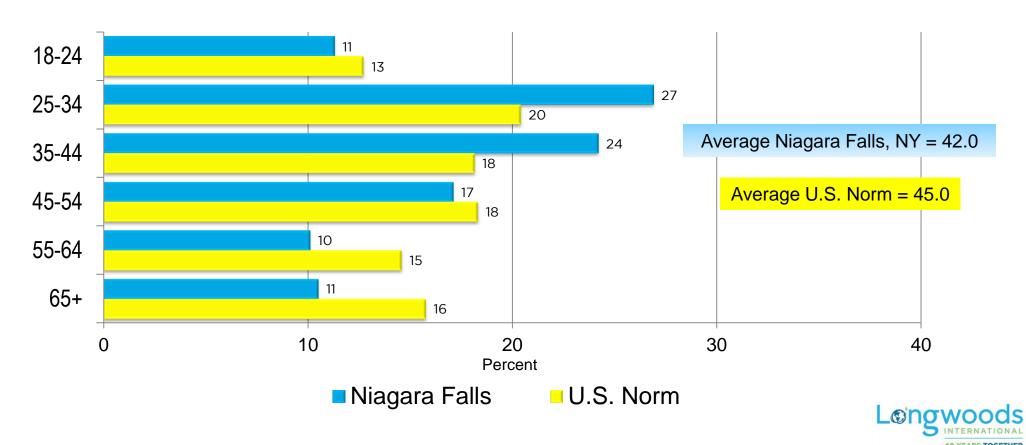
#### Gender



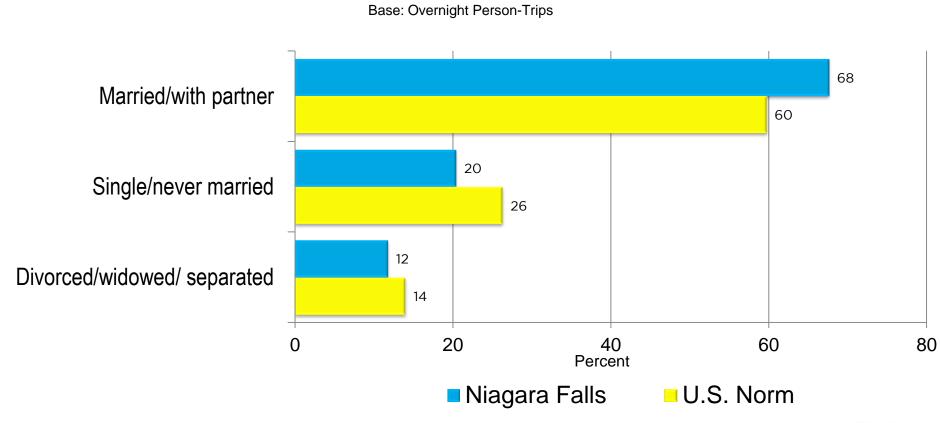


#### Age



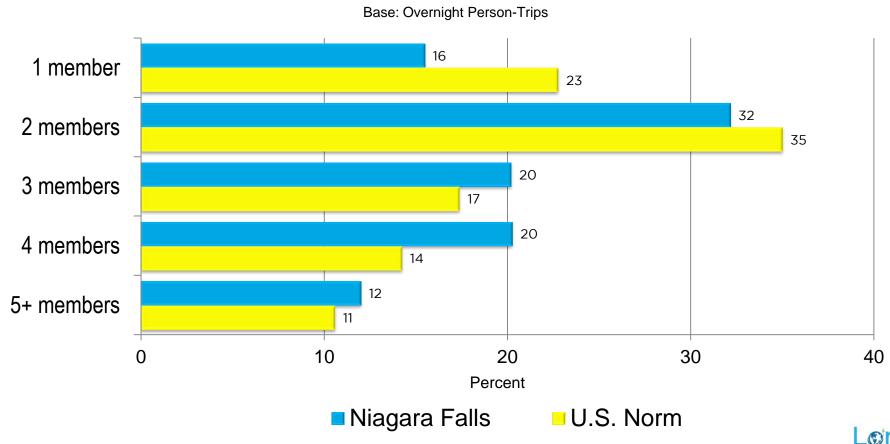


#### **Marital Status**

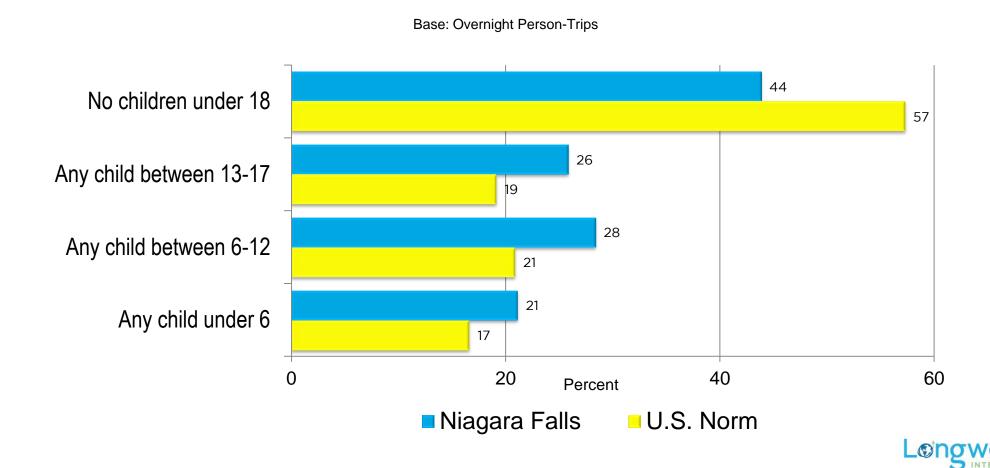




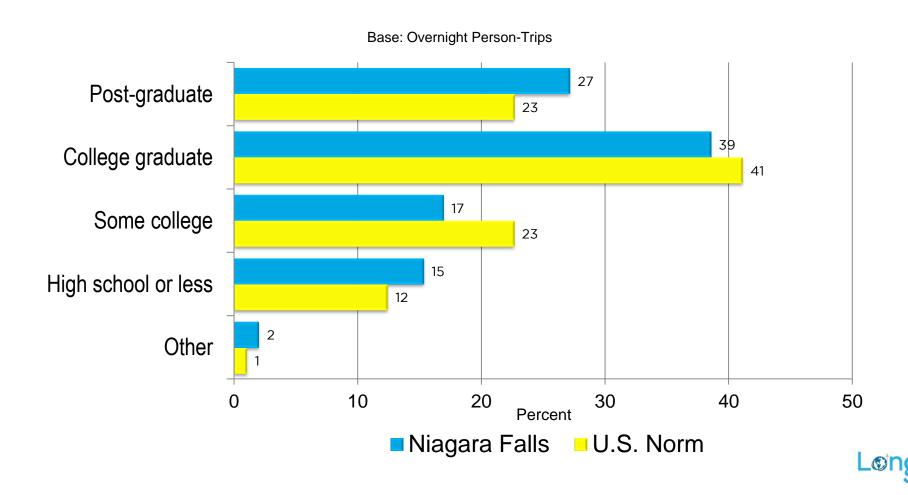
#### **Household Size**



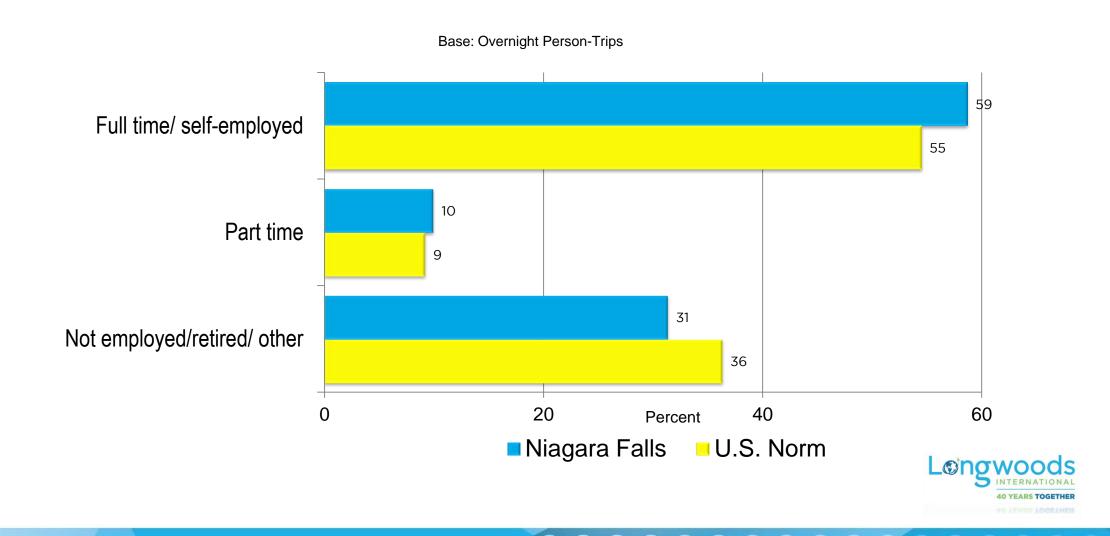
#### Children in Household



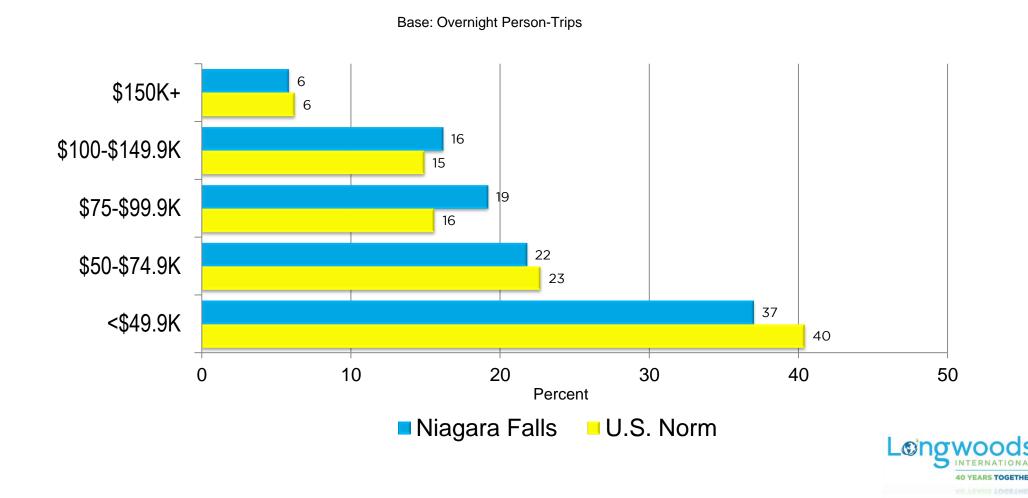
#### Education



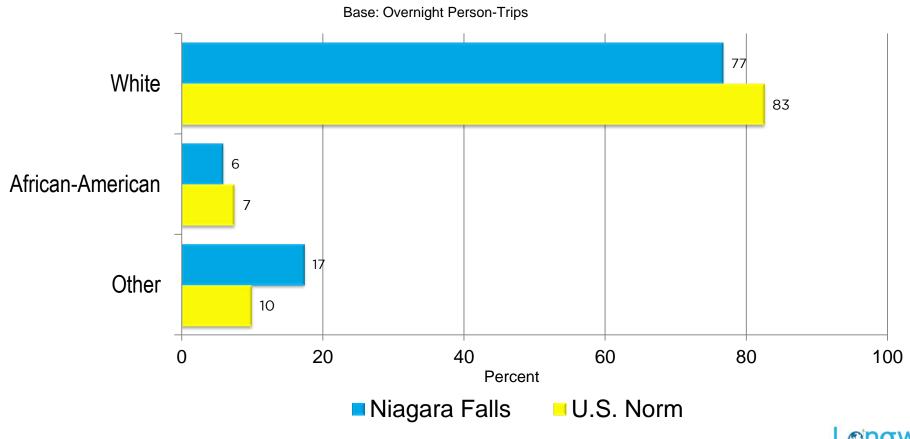
### **Employment**



#### **Household Income**

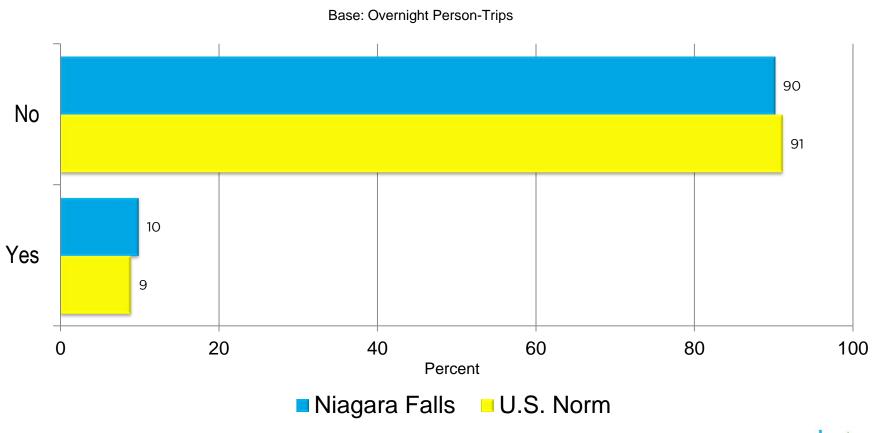


#### Race





### Hispanic Background





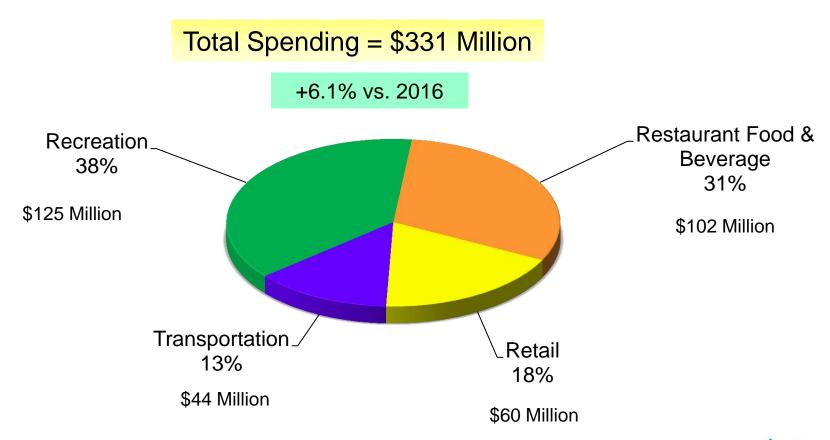




# Day Trip **Expenditures**



# Total Niagara Falls, NY's Domestic Day Trip Spending — by Sector





# Average Per Person Expenditures on Day Trips — By Sector





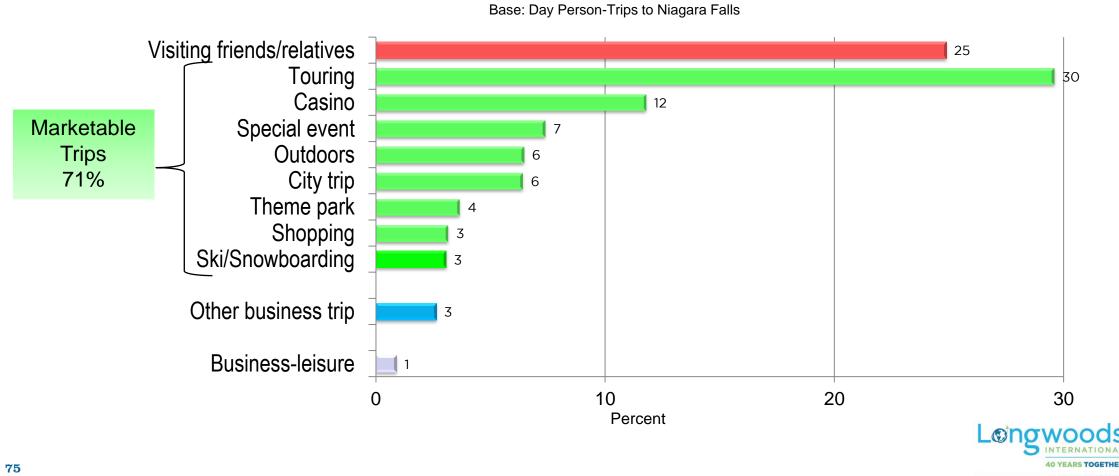




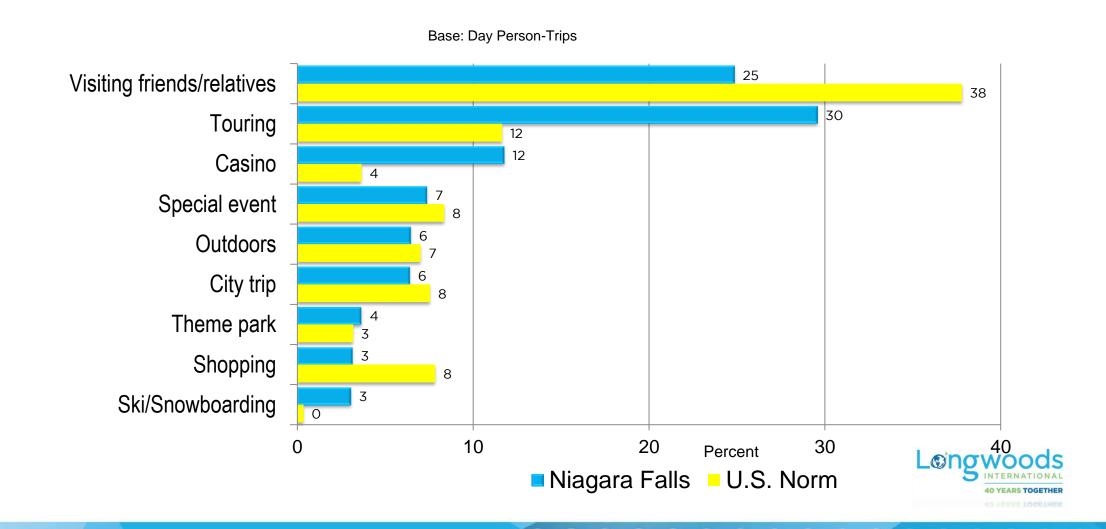
# Day Trip Characteristics



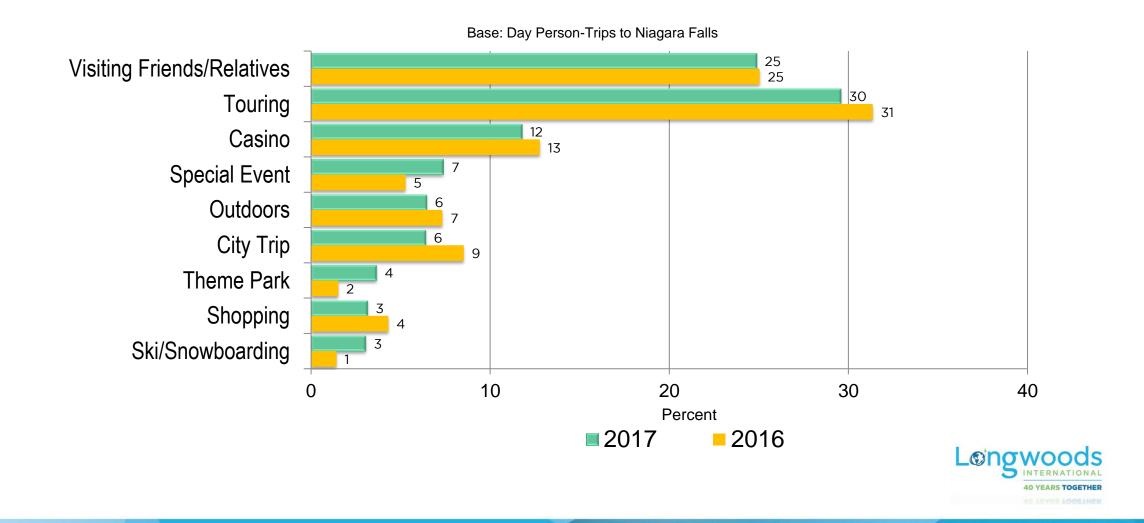
### **Main Purpose of Trip**



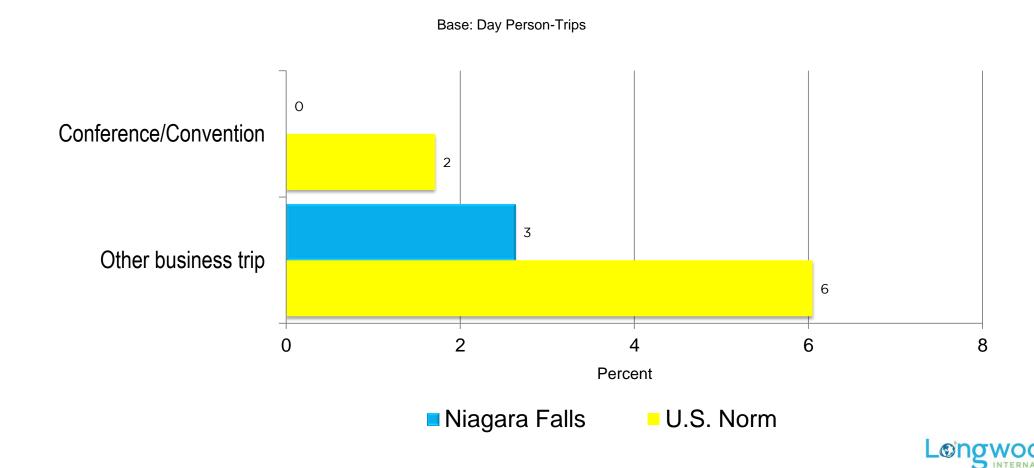
# Main Purpose of Leisure Trip — Niagara Falls vs. National Norm



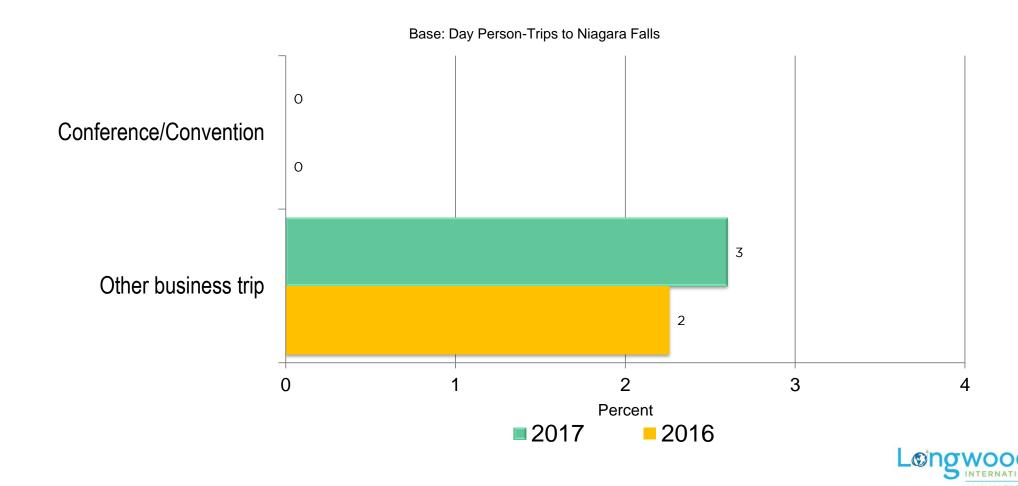
# Main Purpose of Day Leisure Trip — 2017 vs. 2016



# Main Purpose of Day Business Trip — Niagara Falls vs. National Norm

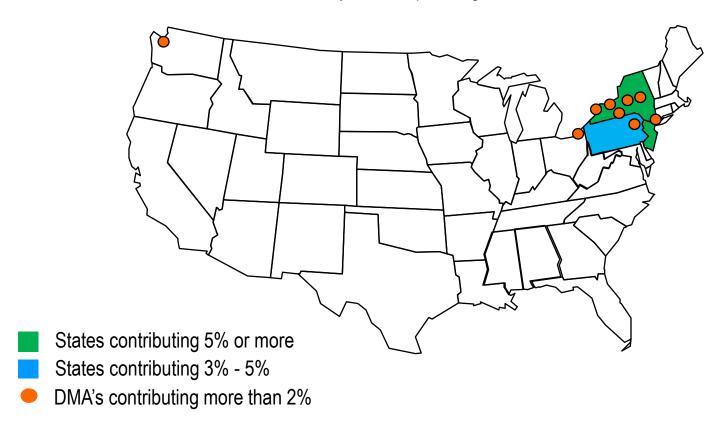


# Main Purpose of Day Business Trip — 2017 vs. 2016



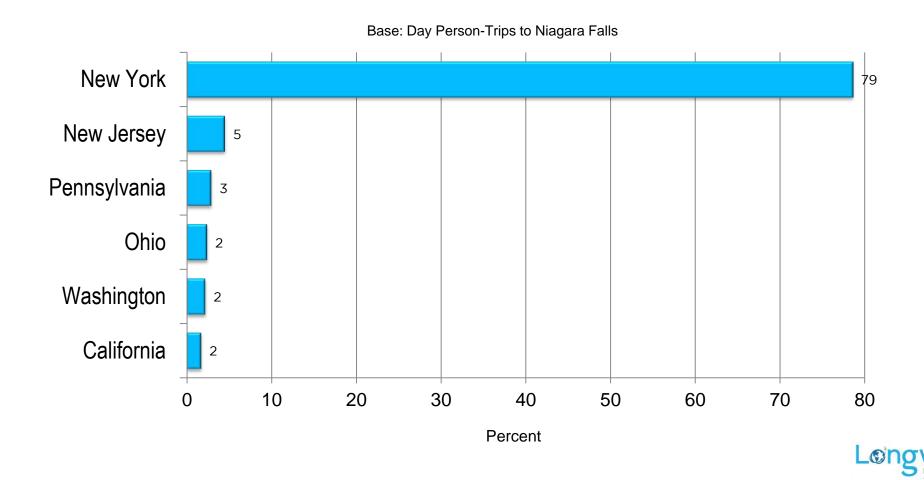
### **Sources of Business**





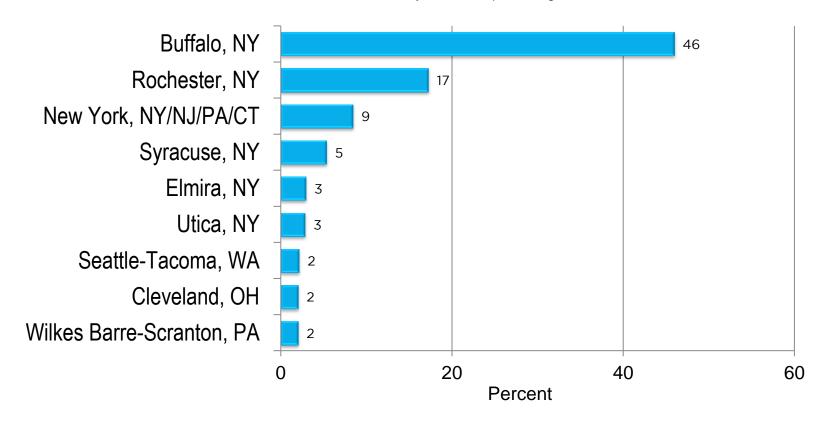


## **State Origin Of Trip**



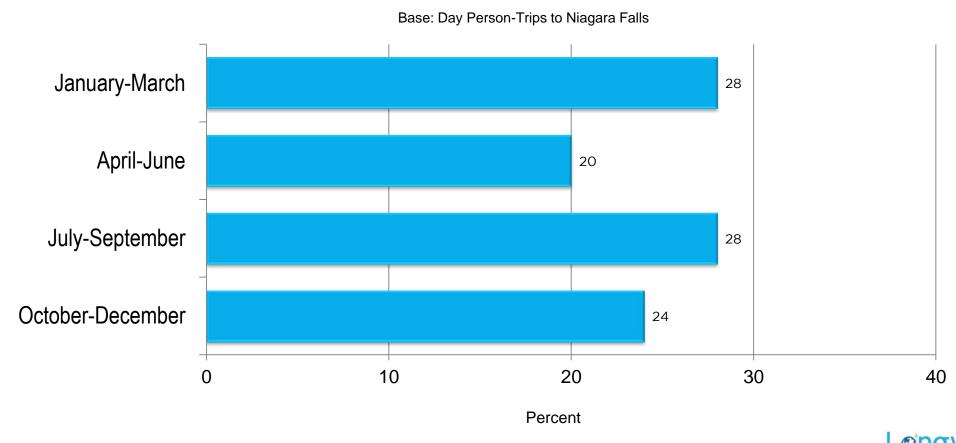
### **DMA Origin Of Trip**



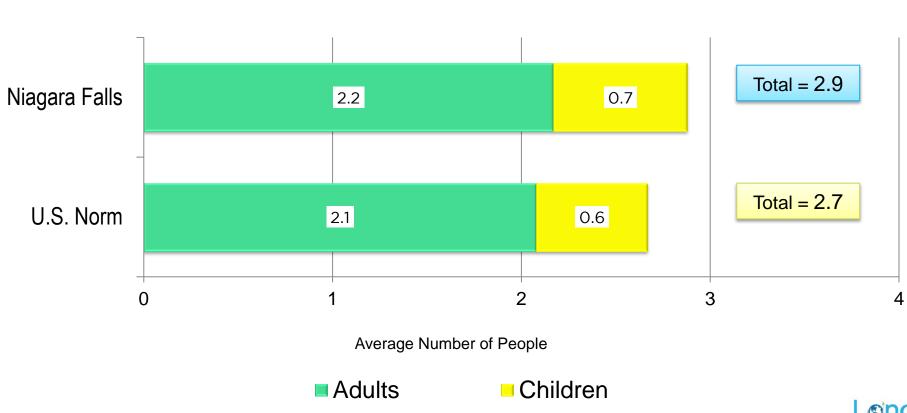




# **Season of Trip**



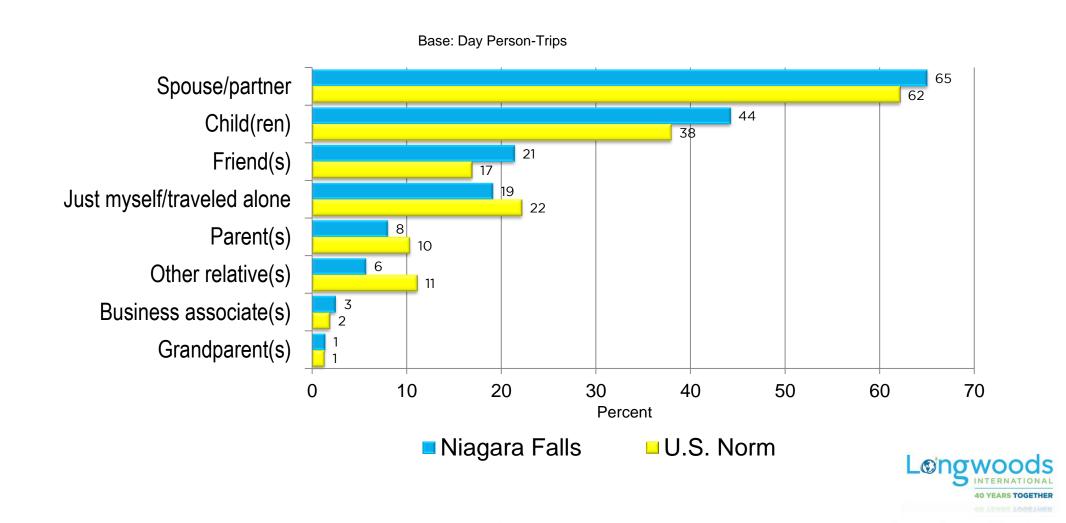
### **Size of Travel Party**



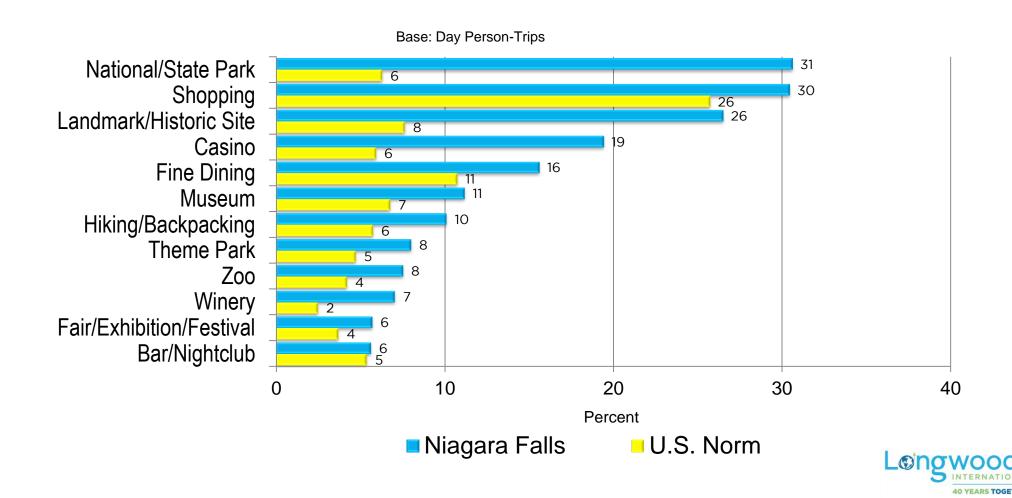
Base: Day Person-Trips



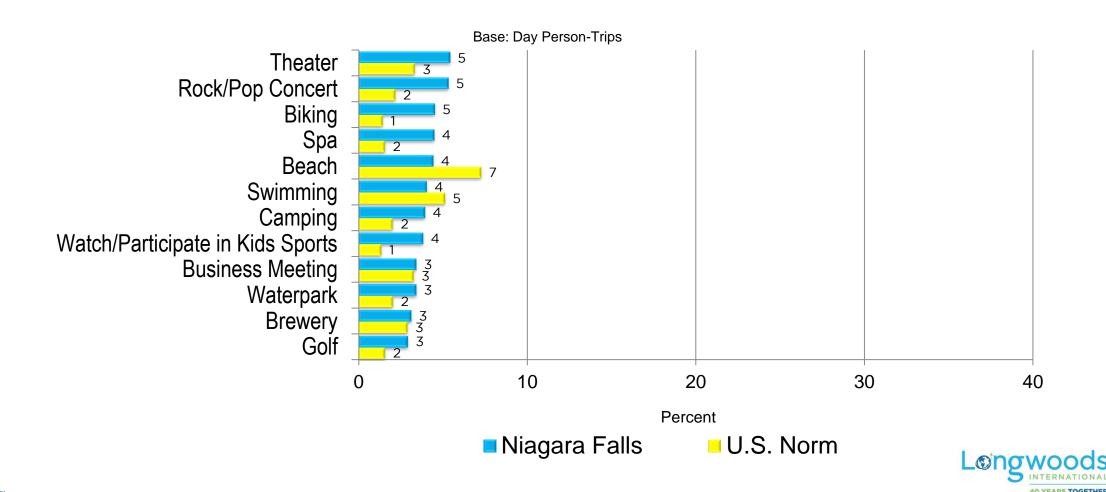
### **Composition of Immediate Travel Party**



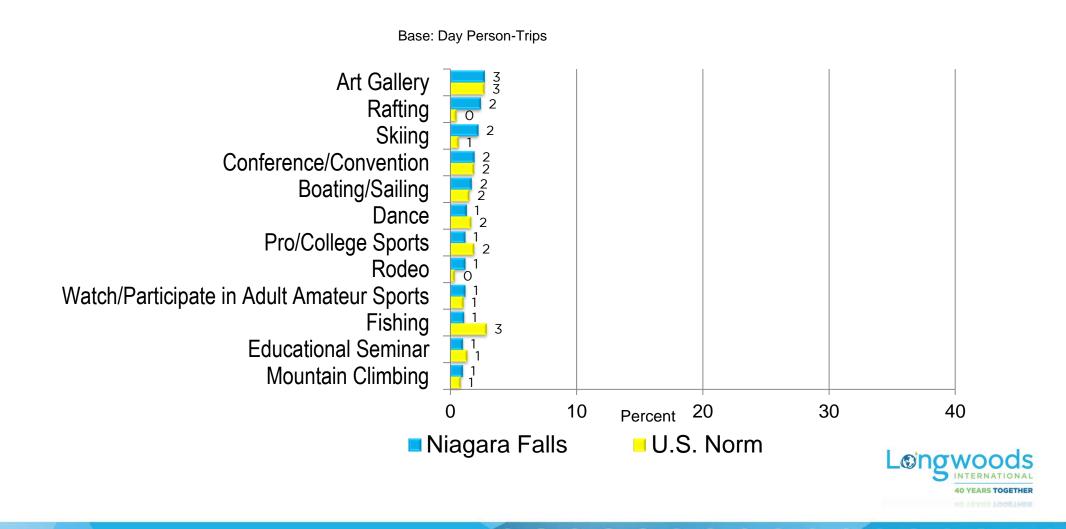
### **Activities and Experiences**



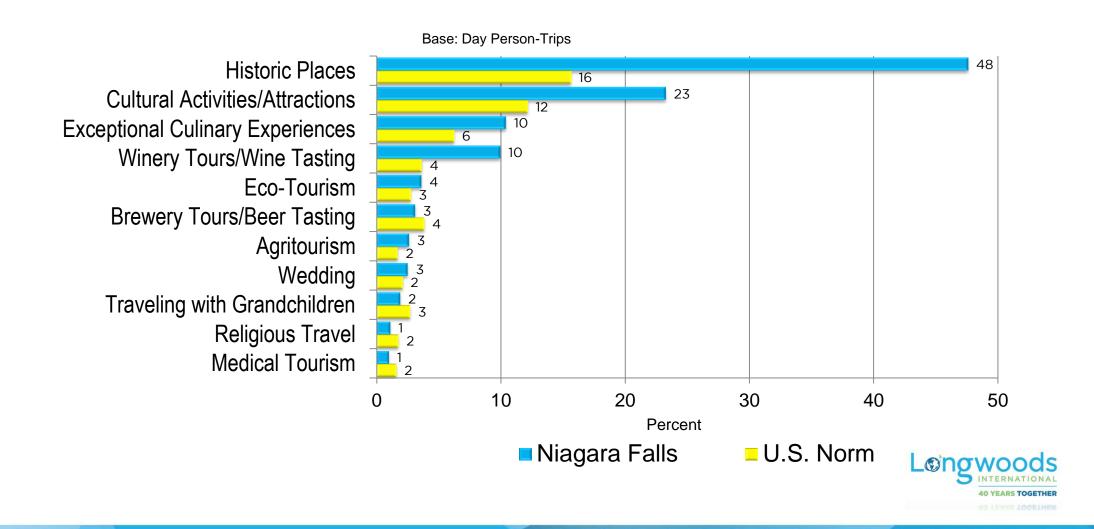
### **Activities and Experiences (Cont'd)**



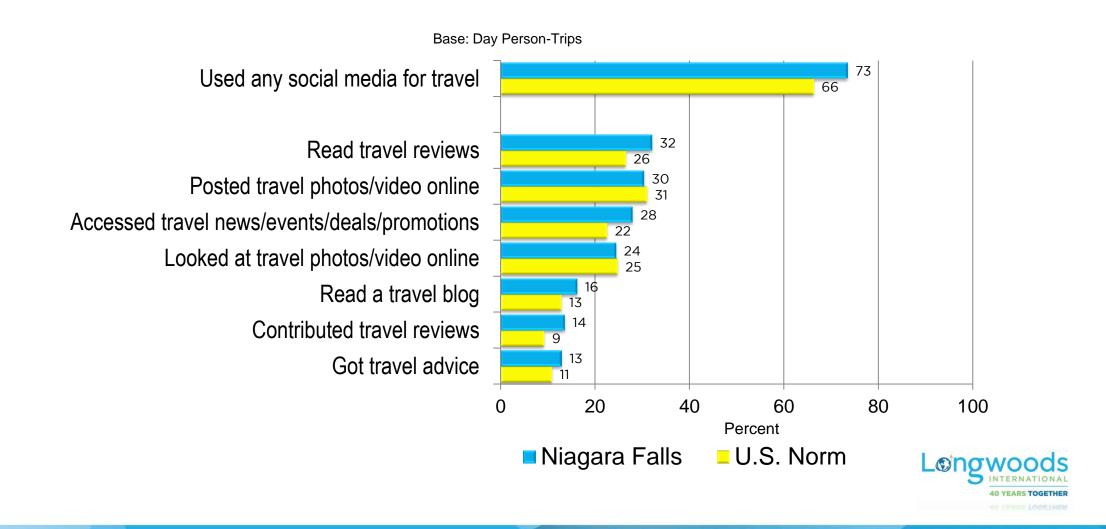
### Activities and Experiences (Cont'd)



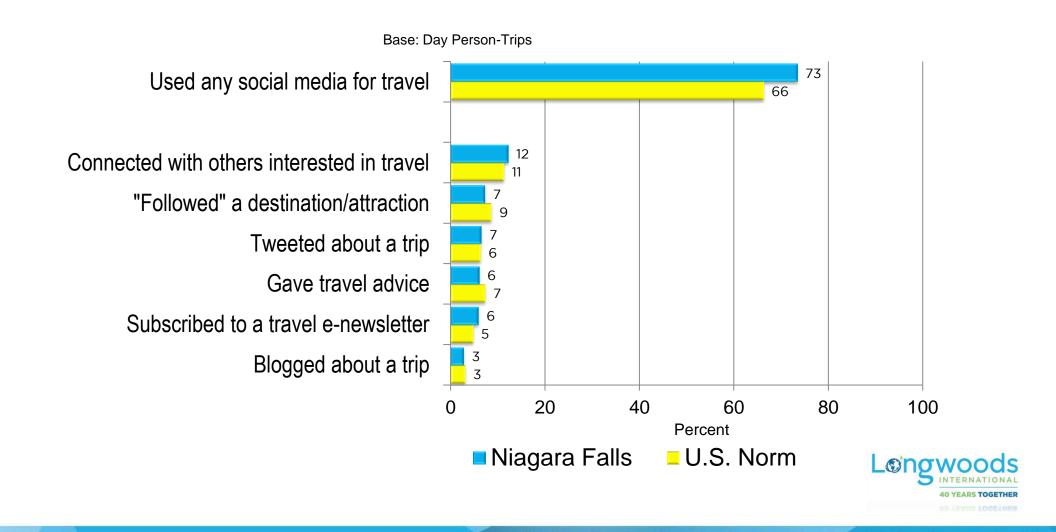
### **Activities of Special Interest**



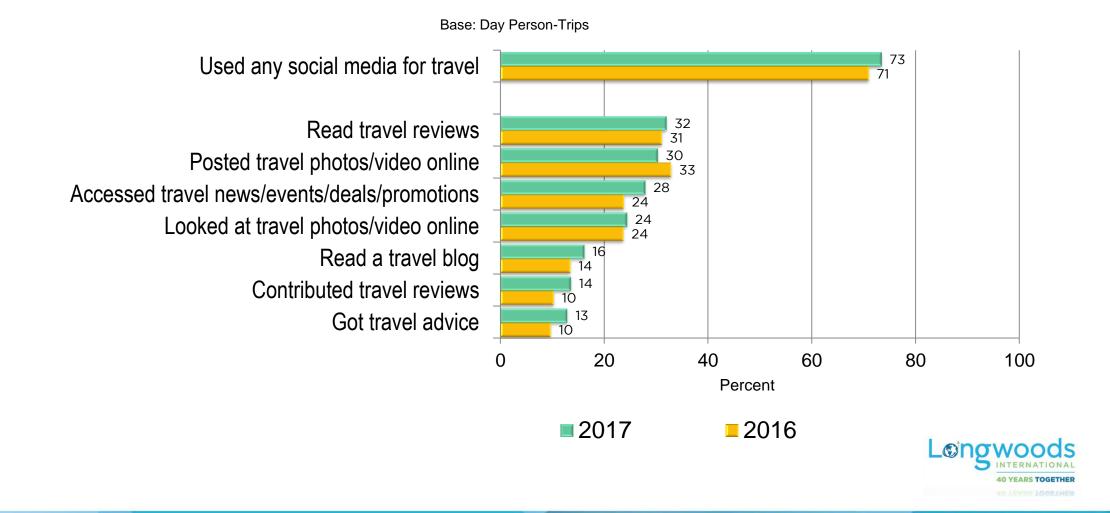
### Online Social Media Use by Travelers



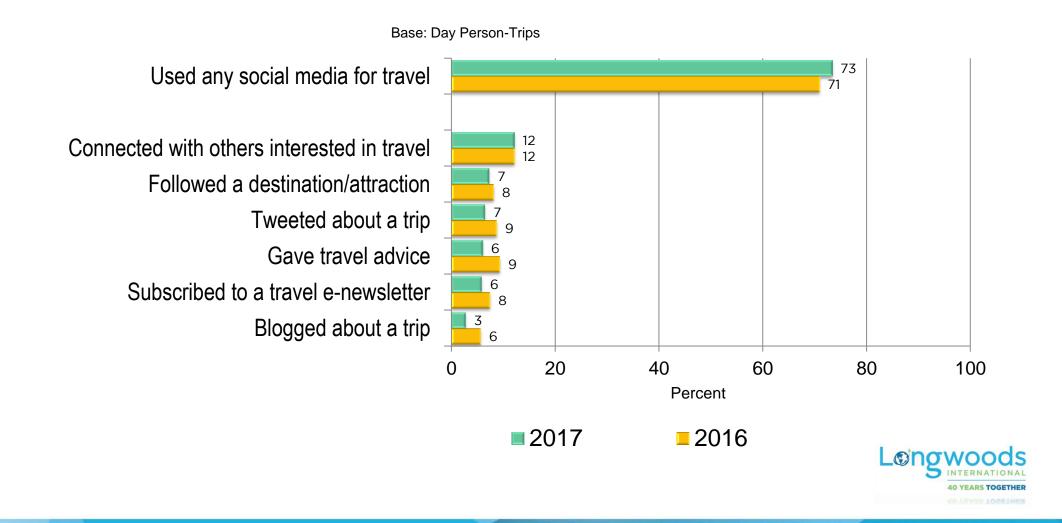
# Online Social Media Use by Travelers (Cont'd)



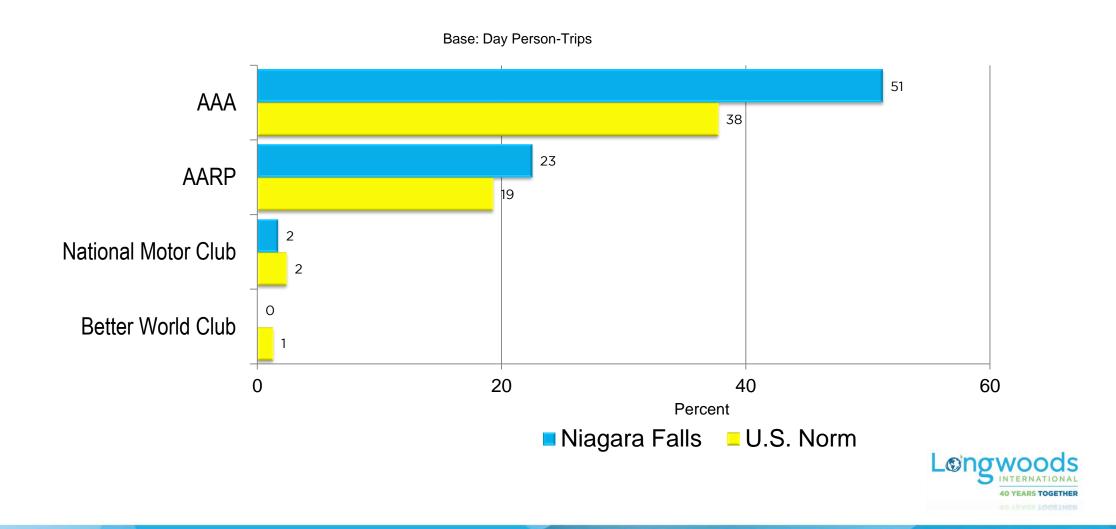
# Online Social Media Use by Travelers – 2017 vs. 2016



# Online Social Media Use by Travelers – 2017 vs. 2016 (Cont'd)



### **Organization Membership**



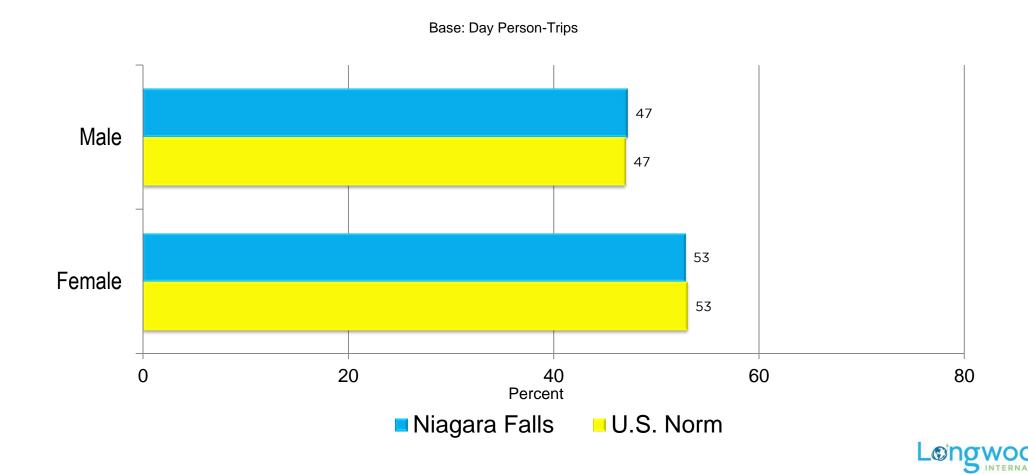




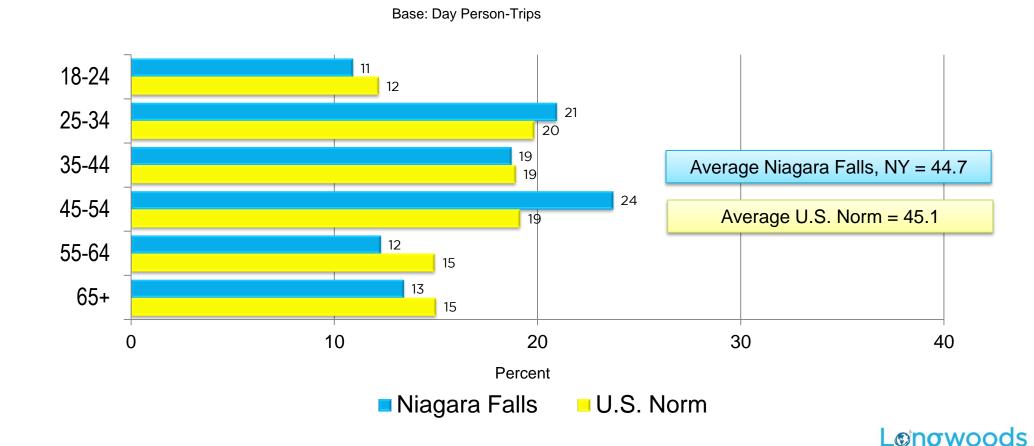
# Demographic Profile of Day Visitors



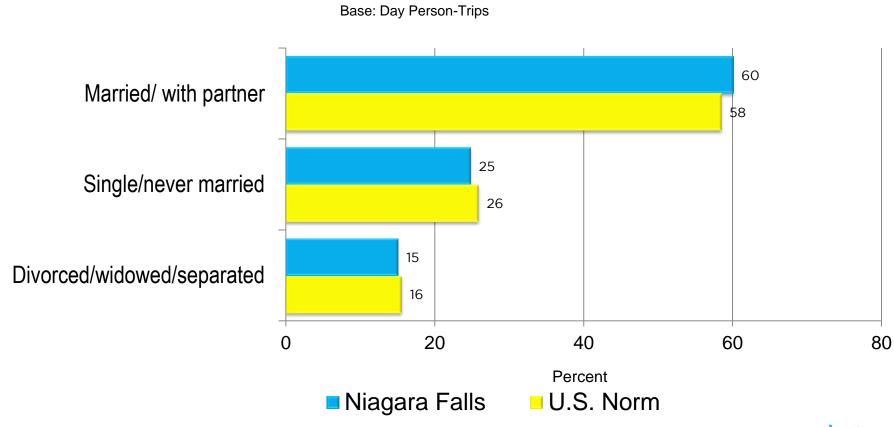
### Gender



### Age

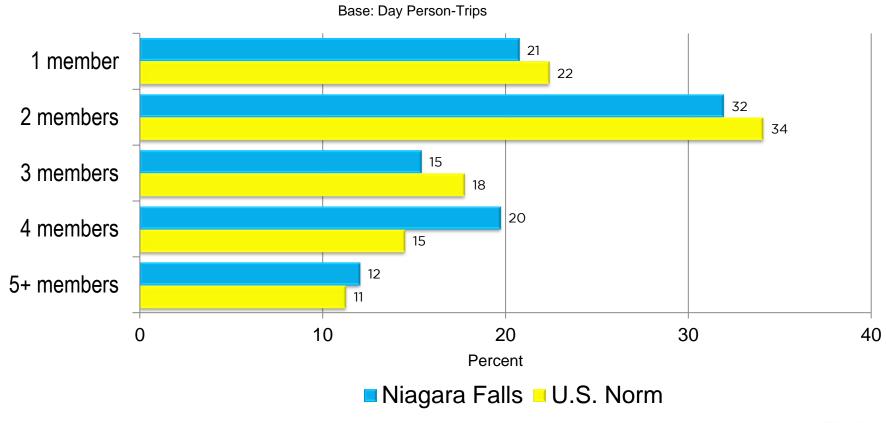


#### **Marital Status**



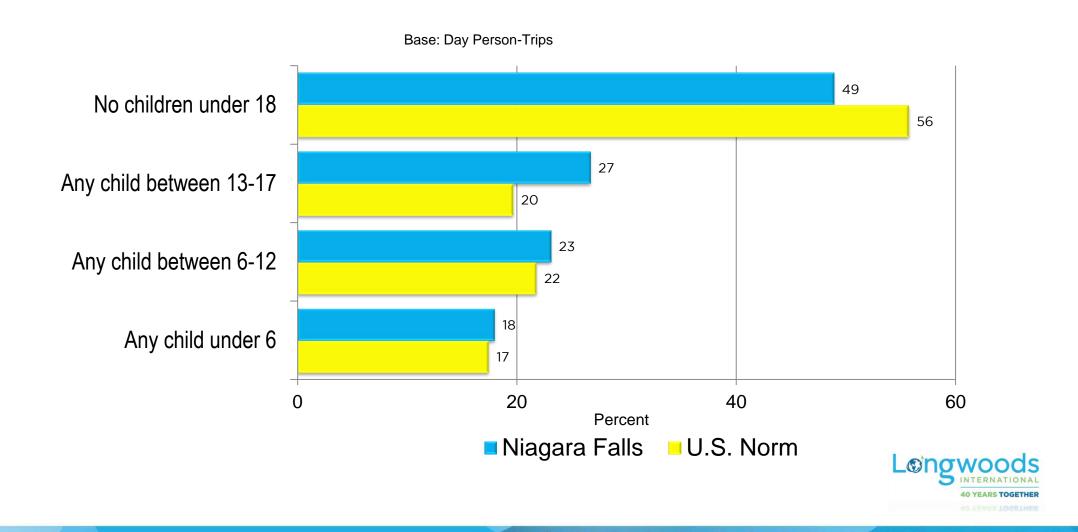


### **Household Size**

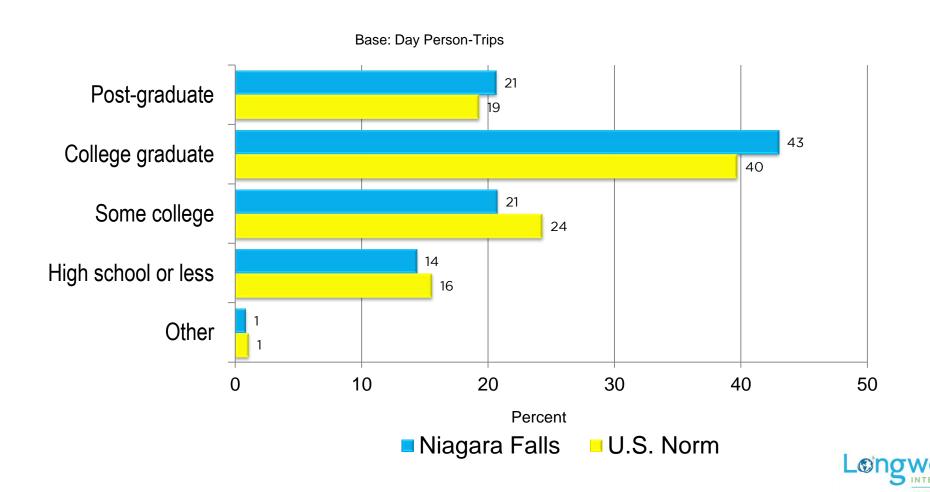




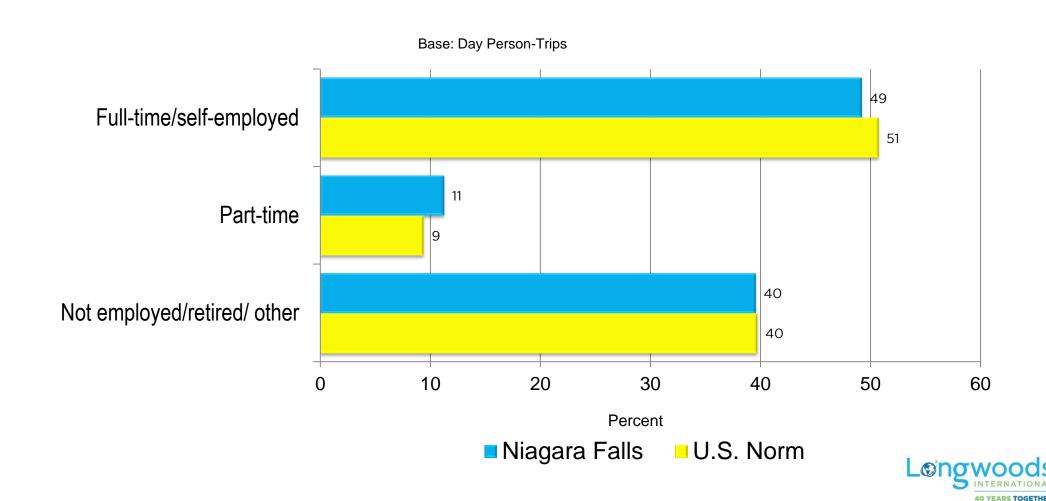
#### Children in Household



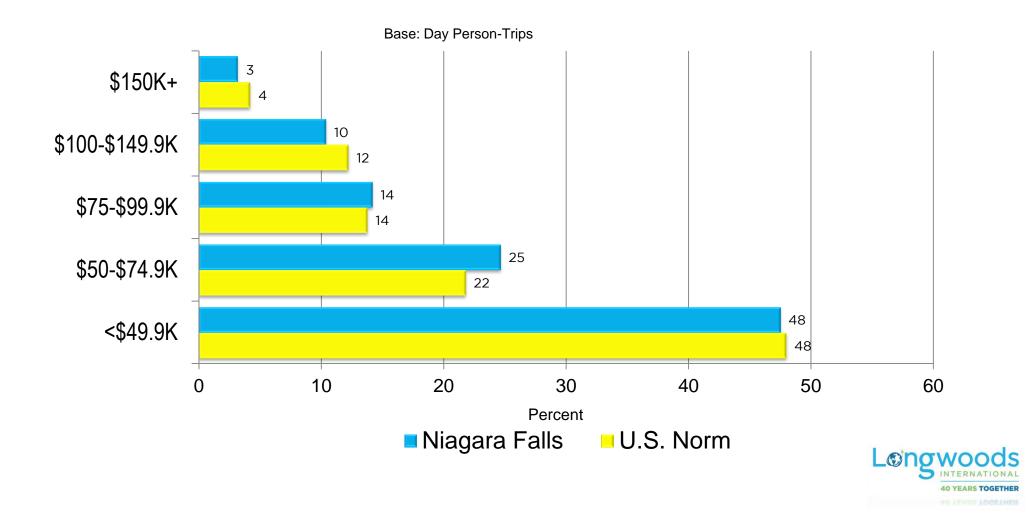
### Education



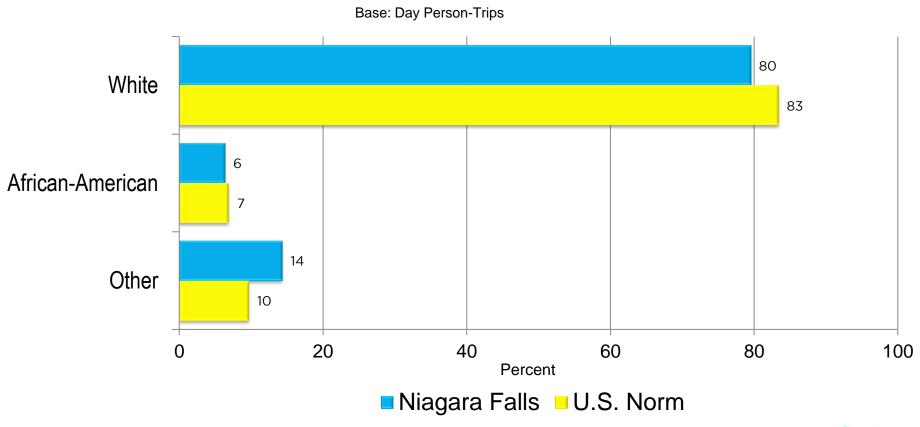
### **Employment**



### **Household Income**

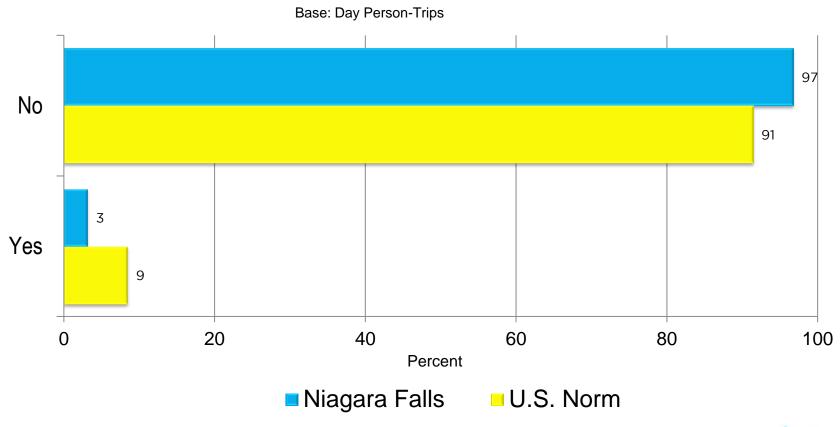


#### Race





## Hispanic Background







# Appendix: Key Terms Defined



#### **Key Terms Defined**

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- A Person-Trip is one trip taken by one visitor.
  - Person-trips are the key unit of measure for this report.



#### **Trip-Type Segments**

#### Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
  - Visiting friends/relatives
  - Touring through a region to experience its scenic beauty, history and culture
  - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
  - Special event, such as a fair, festival, or sports event
  - City trip
  - Cruise
  - Casino
  - Theme park
  - > Resort (ocean beach, inland or mountain resort)
  - Skiing/snowboarding
  - ➢ Golf
- Business Trips:
  - Conference/convention
  - > Other business trip
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.



# Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives