COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

NIAGARA FALLS™ USA

WHERE ADVENTURE COMES NATURALLY

2021

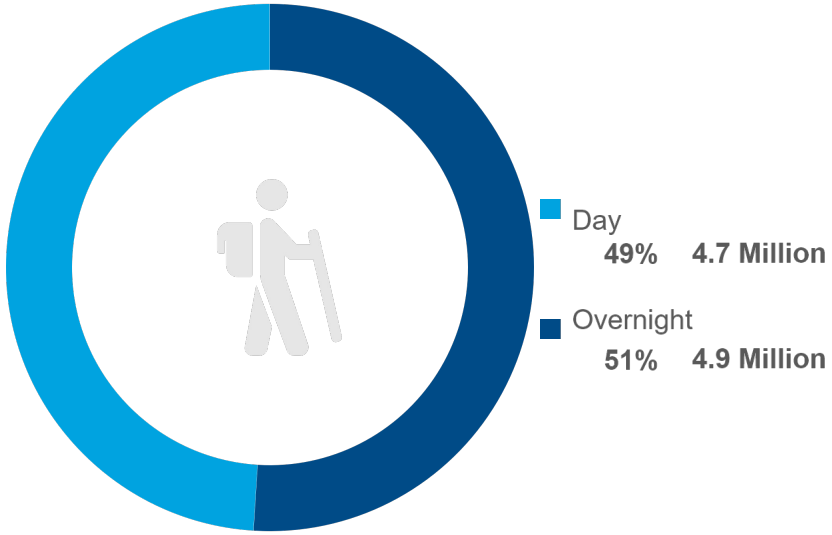
Size of the Niagara Falls Travel Market

Base: 2021 Person-Trips

Total Size of Niagara Falls 2021 Domestic Travel Market

Total Person-Trips

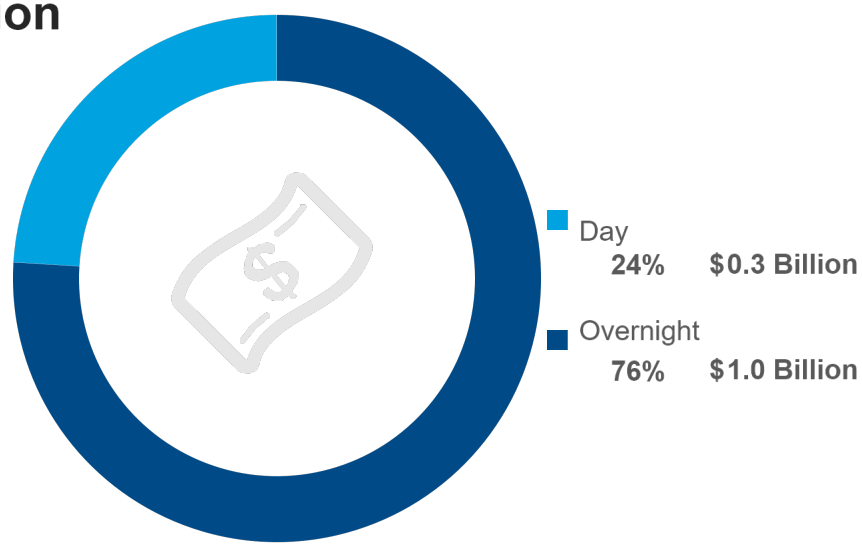
9.6 Million



Total Expenditures for Niagara Falls 2021 Domestic Travel Market

Total Spending

$ 1.4 Billion



COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Overnight Visitation

NIAGARA FALLS™ USA

WHERE ADVENTURE COMES NATURALLY

2021

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- 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.
- This report provides an overview for Niagara Falls' domestic tourism business in 2021.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Niagara Falls, the following sample was achieved in 2021:

Overnight Base Size

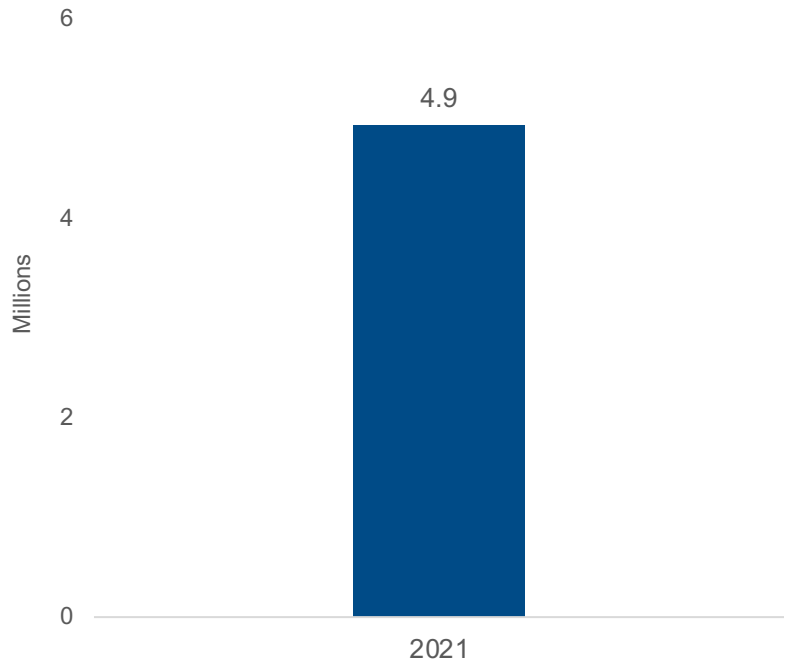
405

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Size and Structure of Niagara Falls's Domestic Travel Market

Base: 2021 Overnight Person-Trips

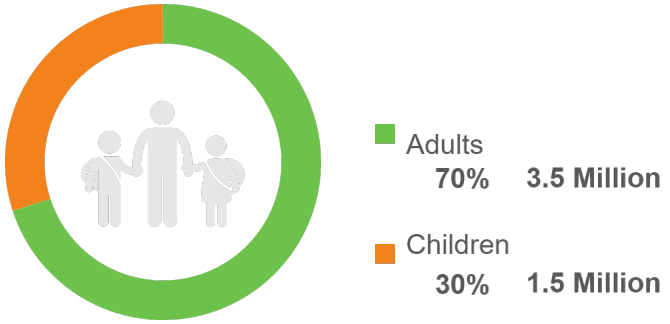
Overnight Trips to Niagara Falls



Size of Niagara Falls Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips

4.9 Million



Past Visitation to Niagara Falls

64% of overnight travelers to Niagara Falls are repeat visitors

41% of overnight travelers to Niagara Falls had visited before in the past 12 months

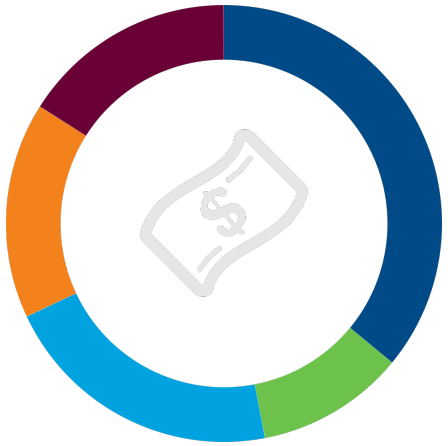
Niagara Falls's Overnight Trip Expenditures

Base: 2021 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

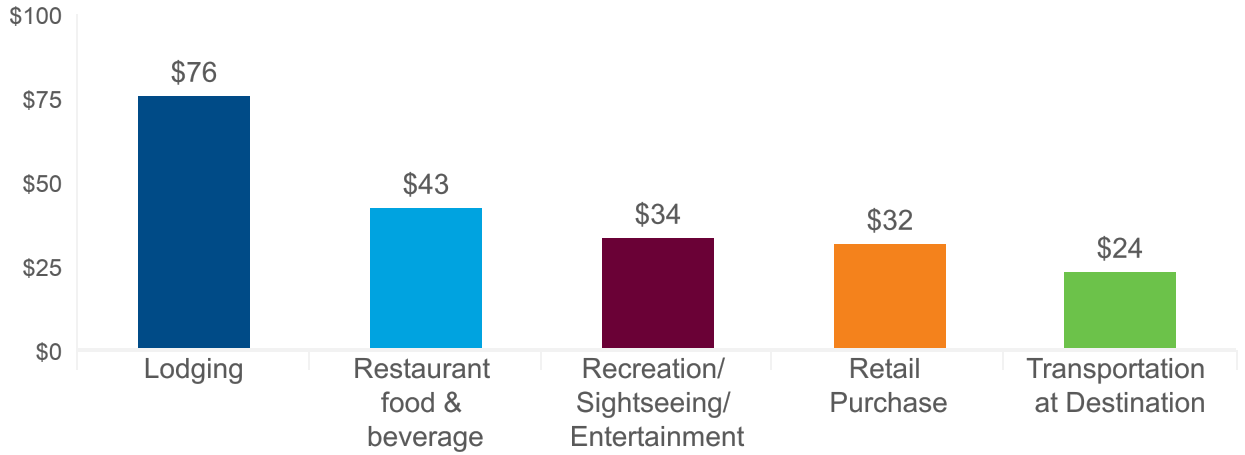
$ 1.030 Billion



Lodging	36%	$373 Million
Transportation at Destination	11%	$118 Million
Restaurant Food & Beverage	21%	$212 Million
Retail Purchase	16%	$160 Million
Recreation/Entertainment	16%	$167 Million

Average Per Person Expenditures on Domestic Overnight Trips - by Sector

Average Per Person: $ 209



Average Per Person:

Leisure $198

Niagara Falls's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

Main Purpose of Trip

33% Visiting friends/ relatives

20% Touring

10% Outdoors

9% City trip

5% Casino

4% Theme park

3% Special event

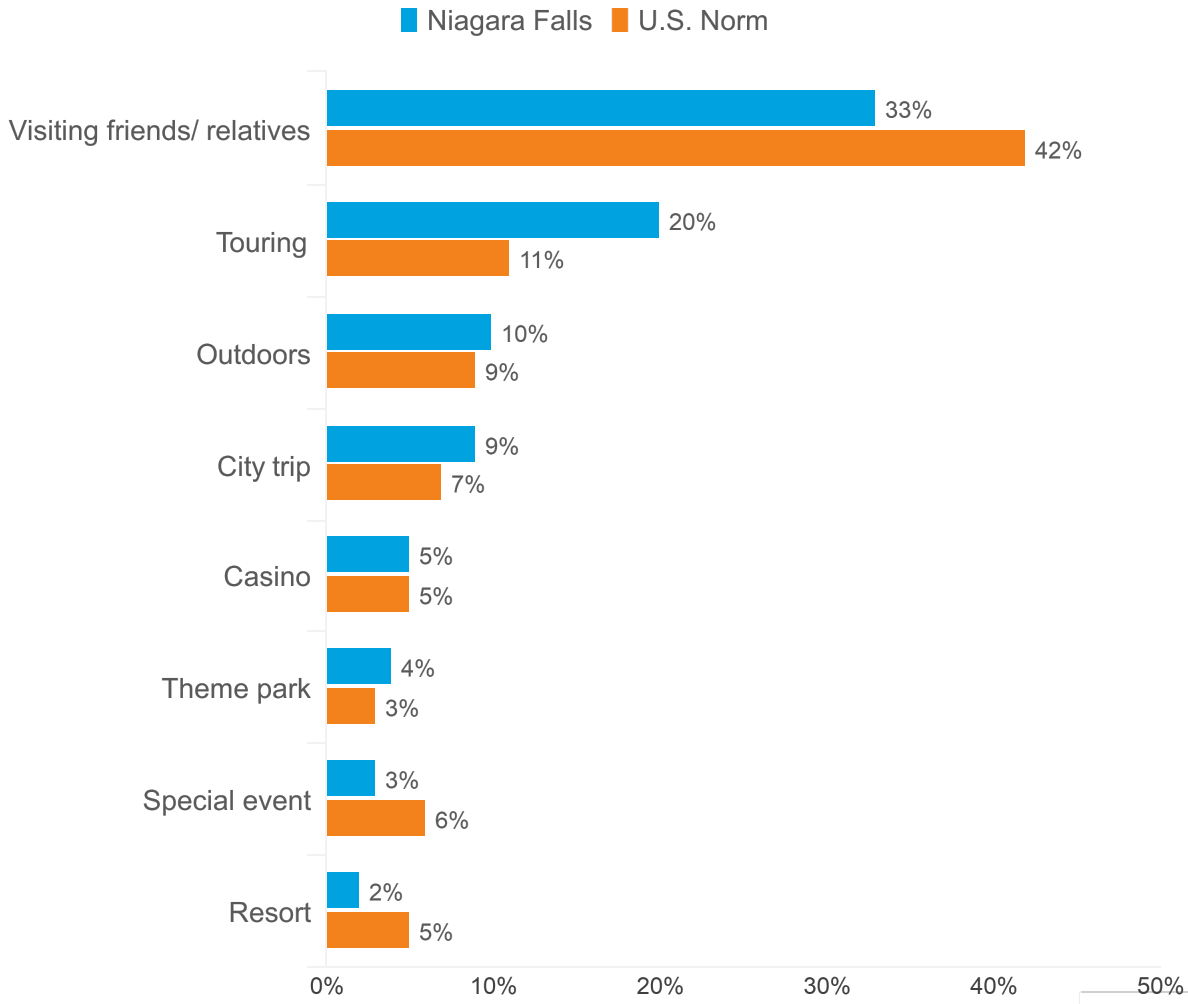
2% Resort

4% Conference/ Convention

2% Other business trip

5% Business-Leisure

Main Purpose of Leisure Trip



Structure of the U.S. and Niagara Falls Overnight Travel Market

Base: 2021 Overnight Person-Trips

2021 U.S. Overnight Trips

Visiting friends/relatives	42%
Marketable	48%
Business	6%
Business-leisure	4%

2021 Niagara Falls Overnight Trips

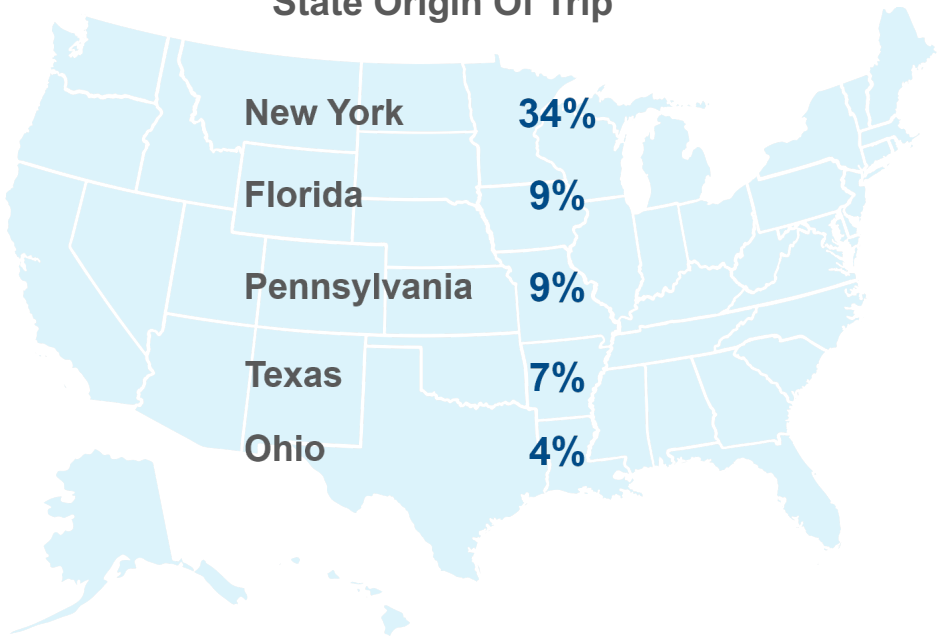
Visiting friends/relatives	33%
Marketable	55%
Business	7%
Business-leisure	5%

Longwoods INTERNATIONAL

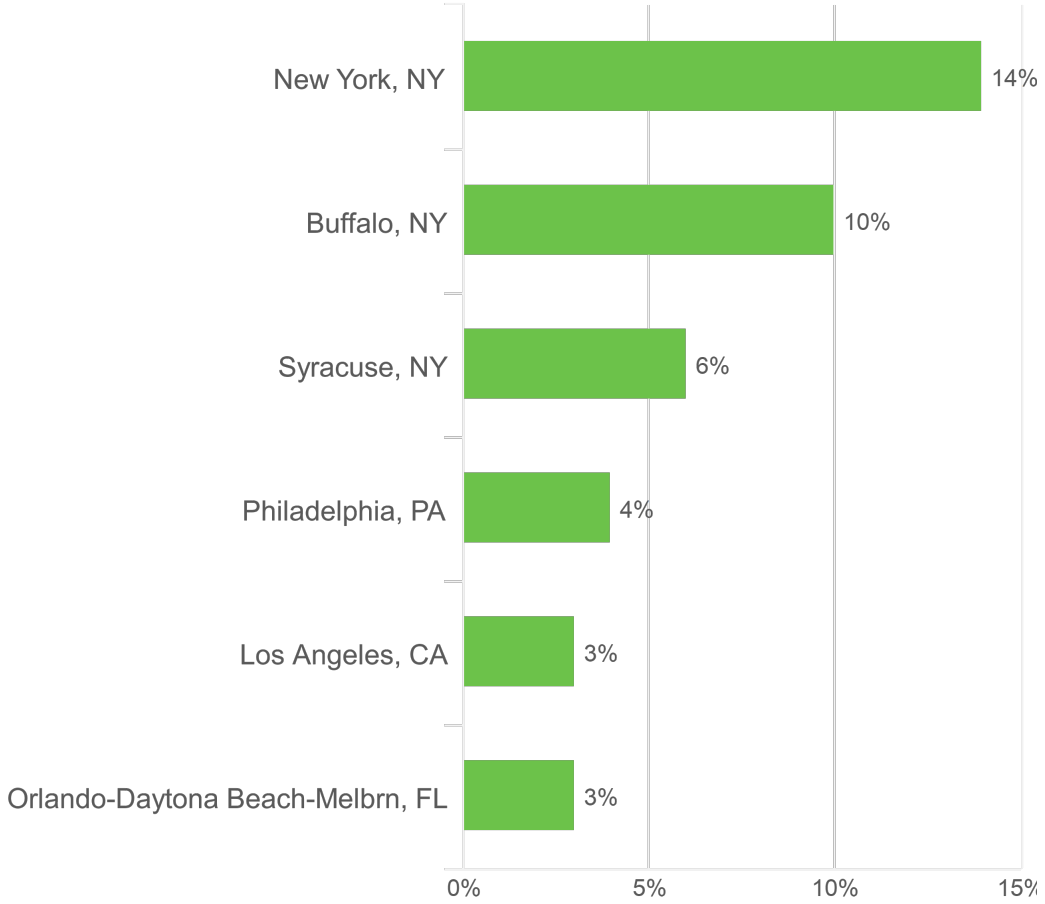
Niagara Falls's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

State Origin Of Trip



DMA Origin Of Trip



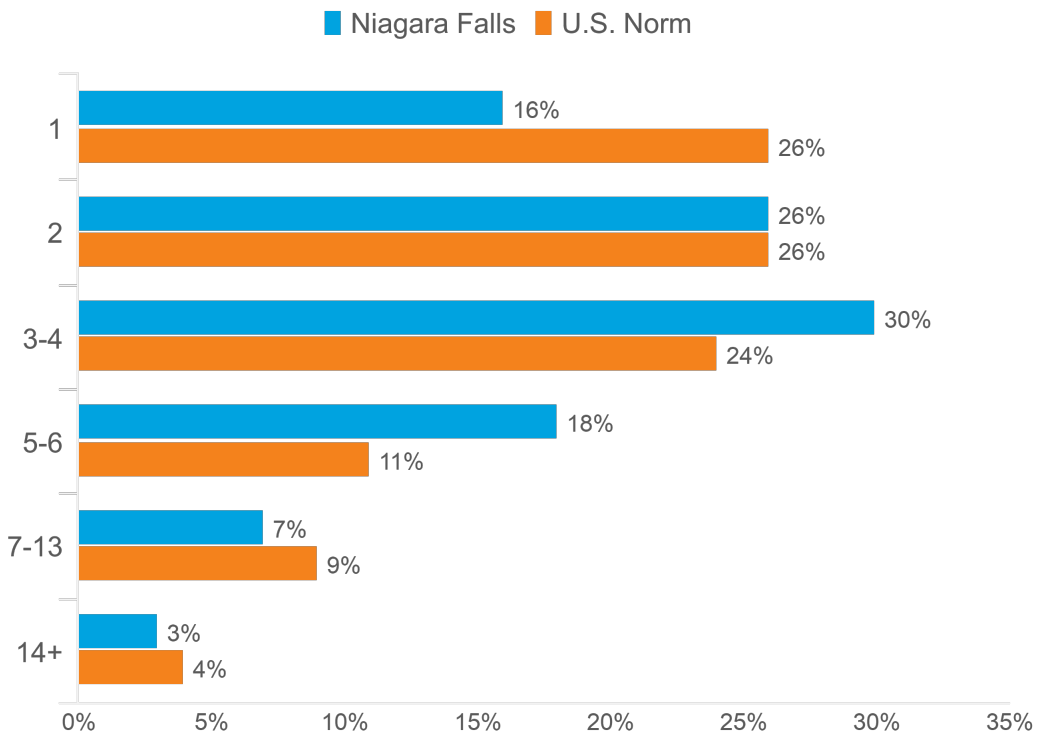
Season of Trip

Total Overnight Person-Trips

Niagara Falls's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

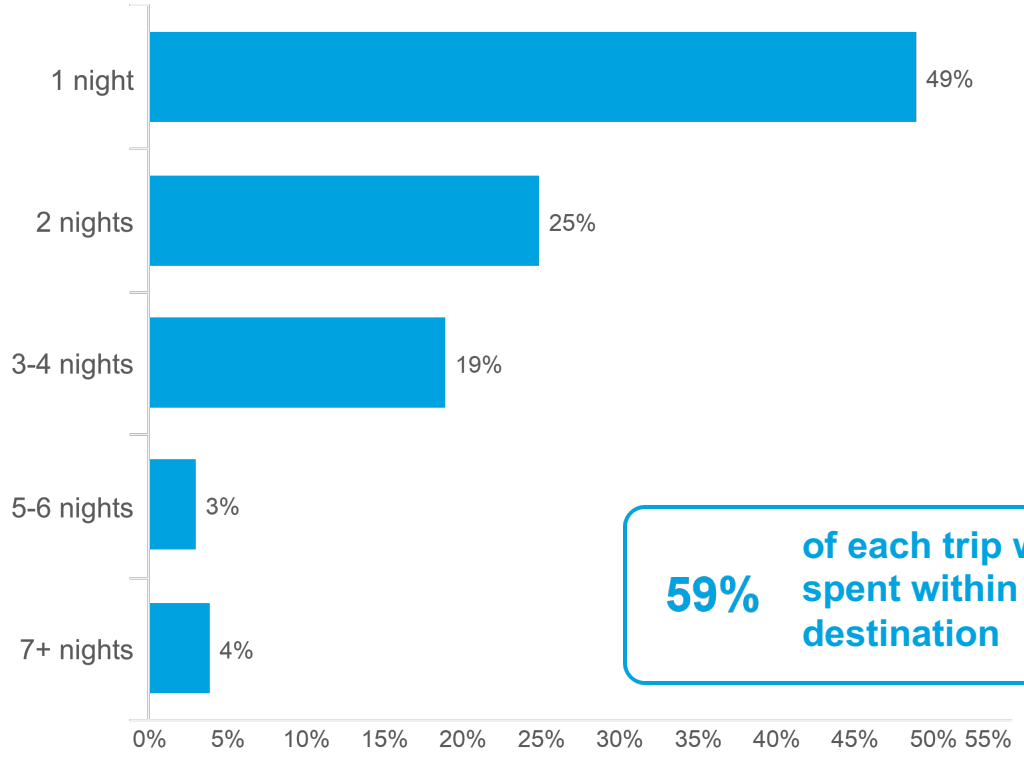
Total Nights Away on Trip



Niagara Falls
3.9
Average Nights

U.S. Norm
3.9
Average Nights

Nights Spent in Niagara Falls



59% of each trip was spent within the destination

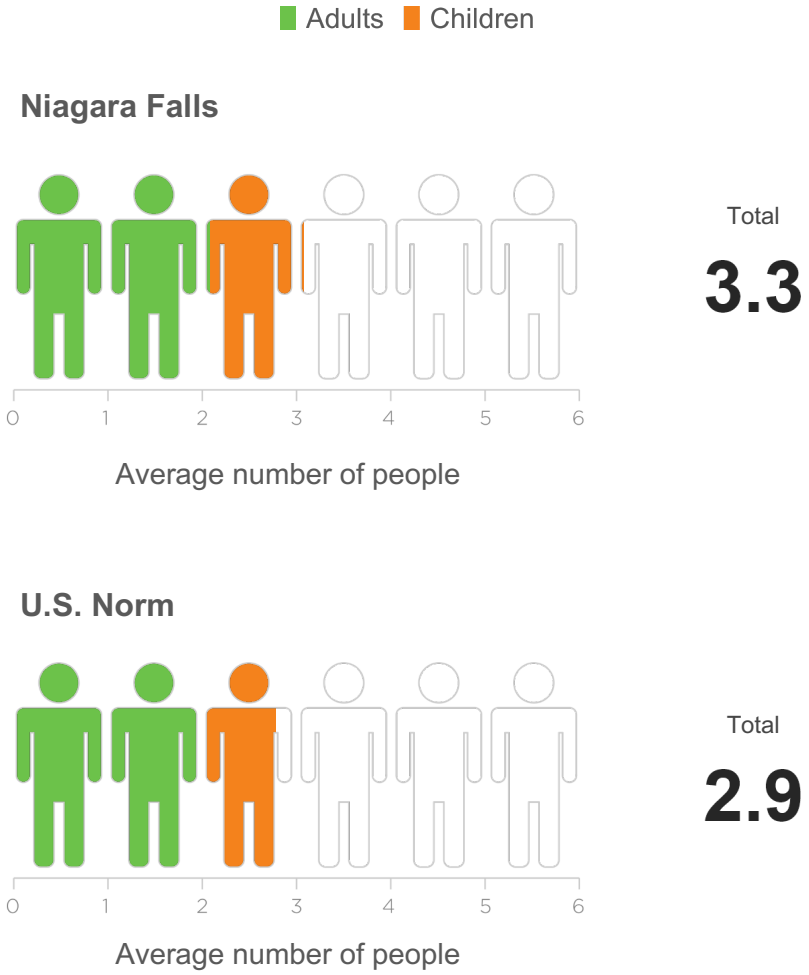
Average number of nights
2.3

Average last year
2.1

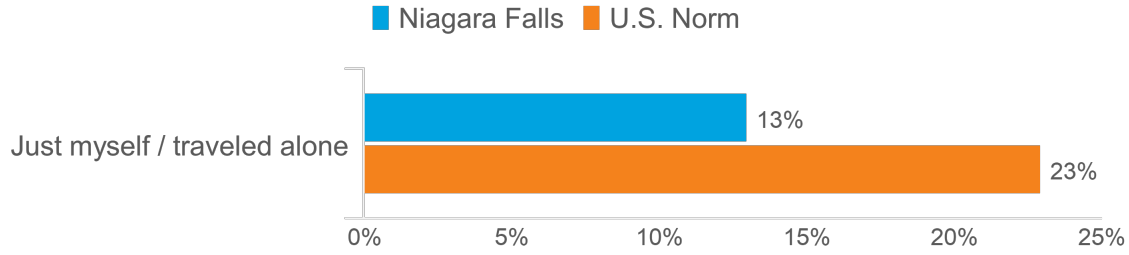
Niagara Falls's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

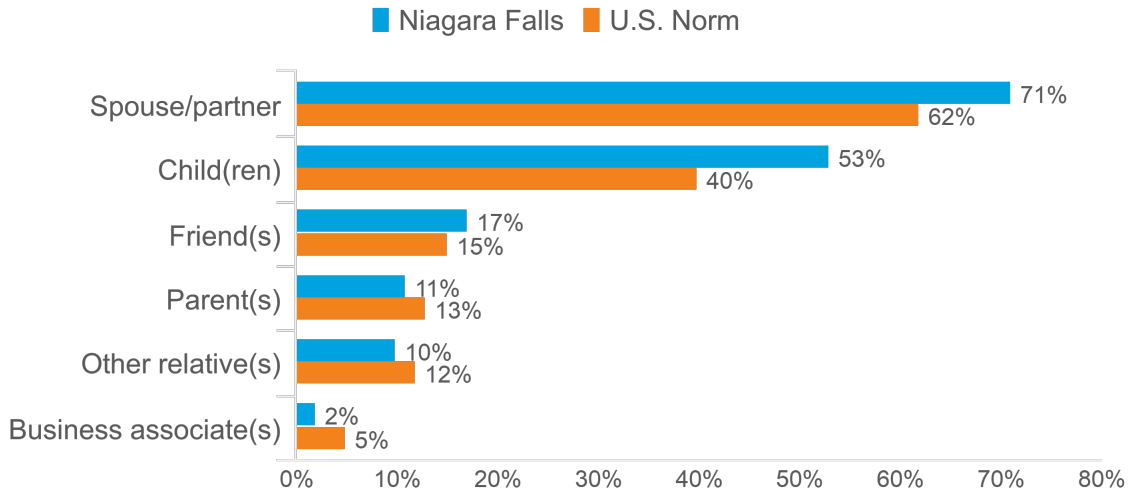
Size of Travel Party



Percent Who Traveled Alone



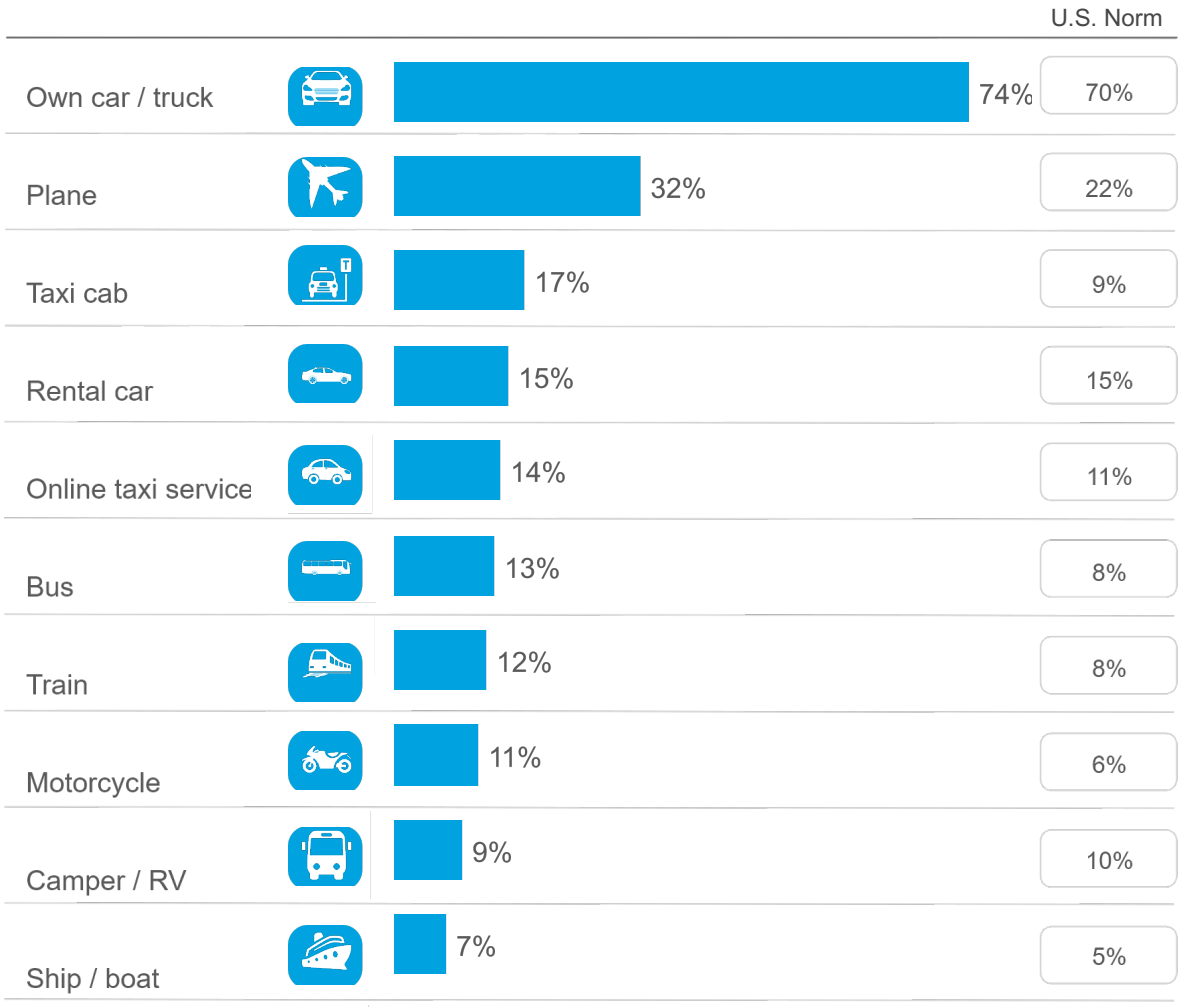
Composition of Immediate Travel Party



Niagara Falls's Overnight Trip Characteristics

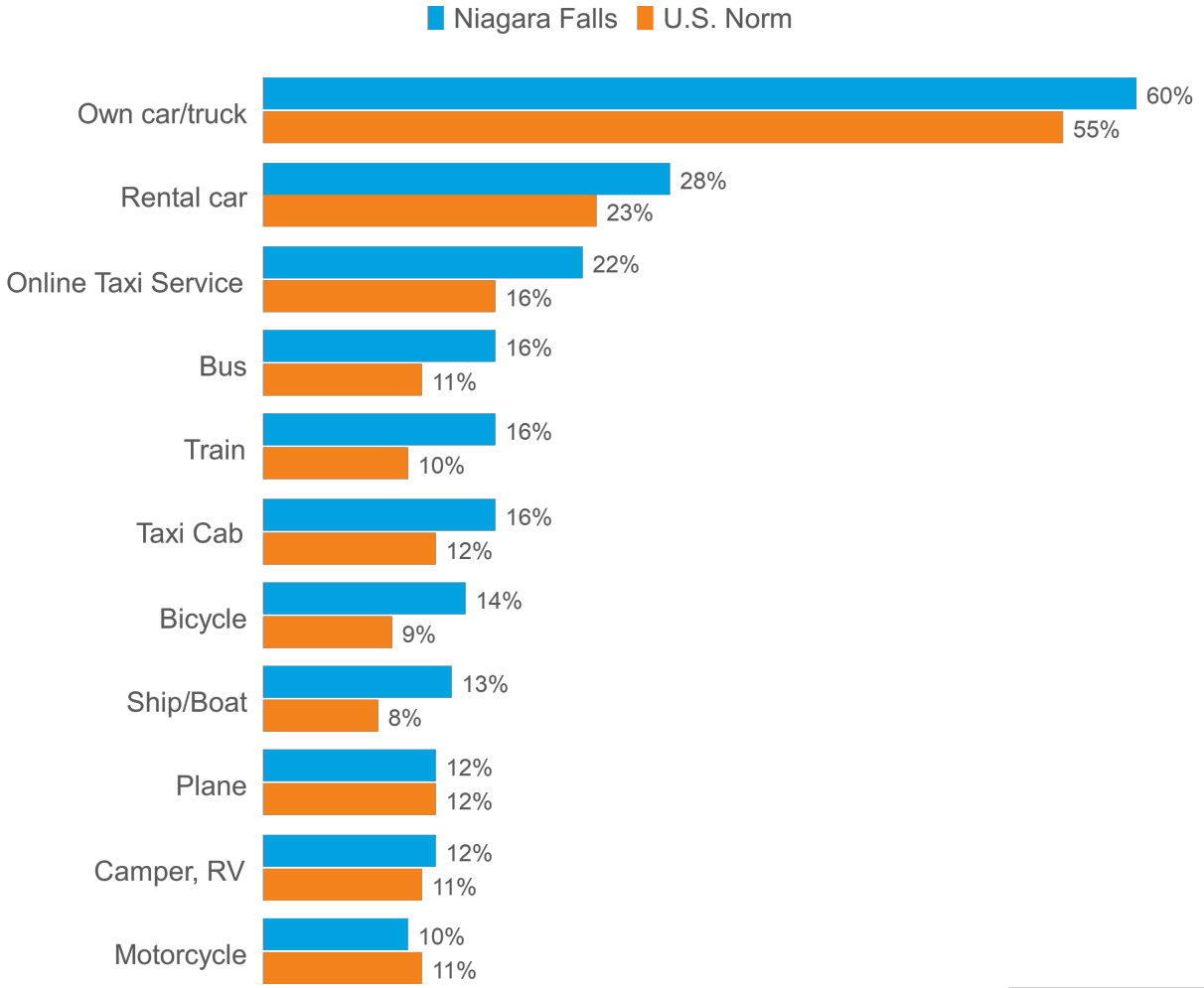
Base: 2021 Overnight Person-Trips

Transportation Used to get to Destination



Question updated in 2020

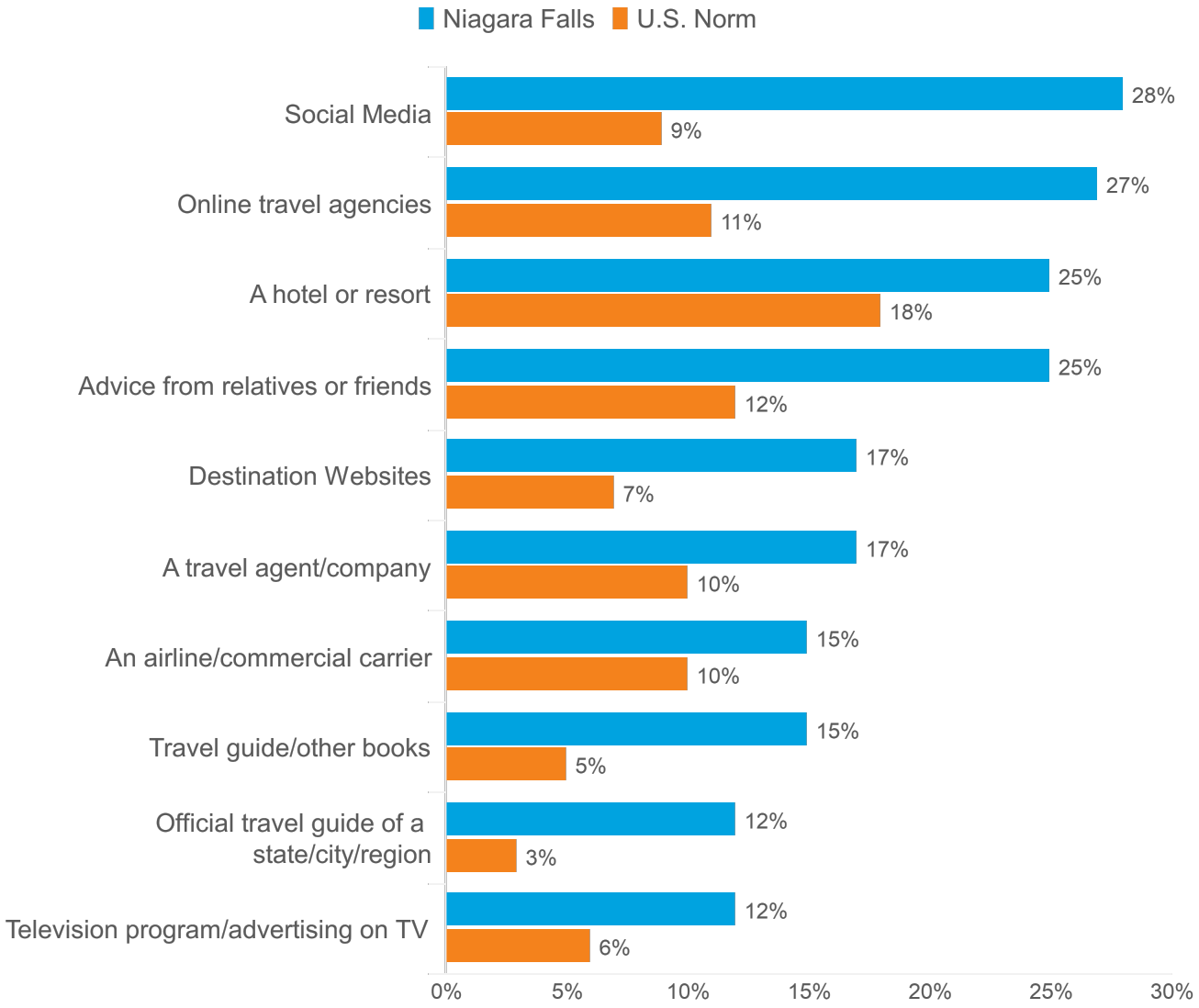
Transportation Used within Destination



Niagara Falls: Pre-Trip

Base: 2021 Overnight Person-Trips

Trip Planning Information Sources



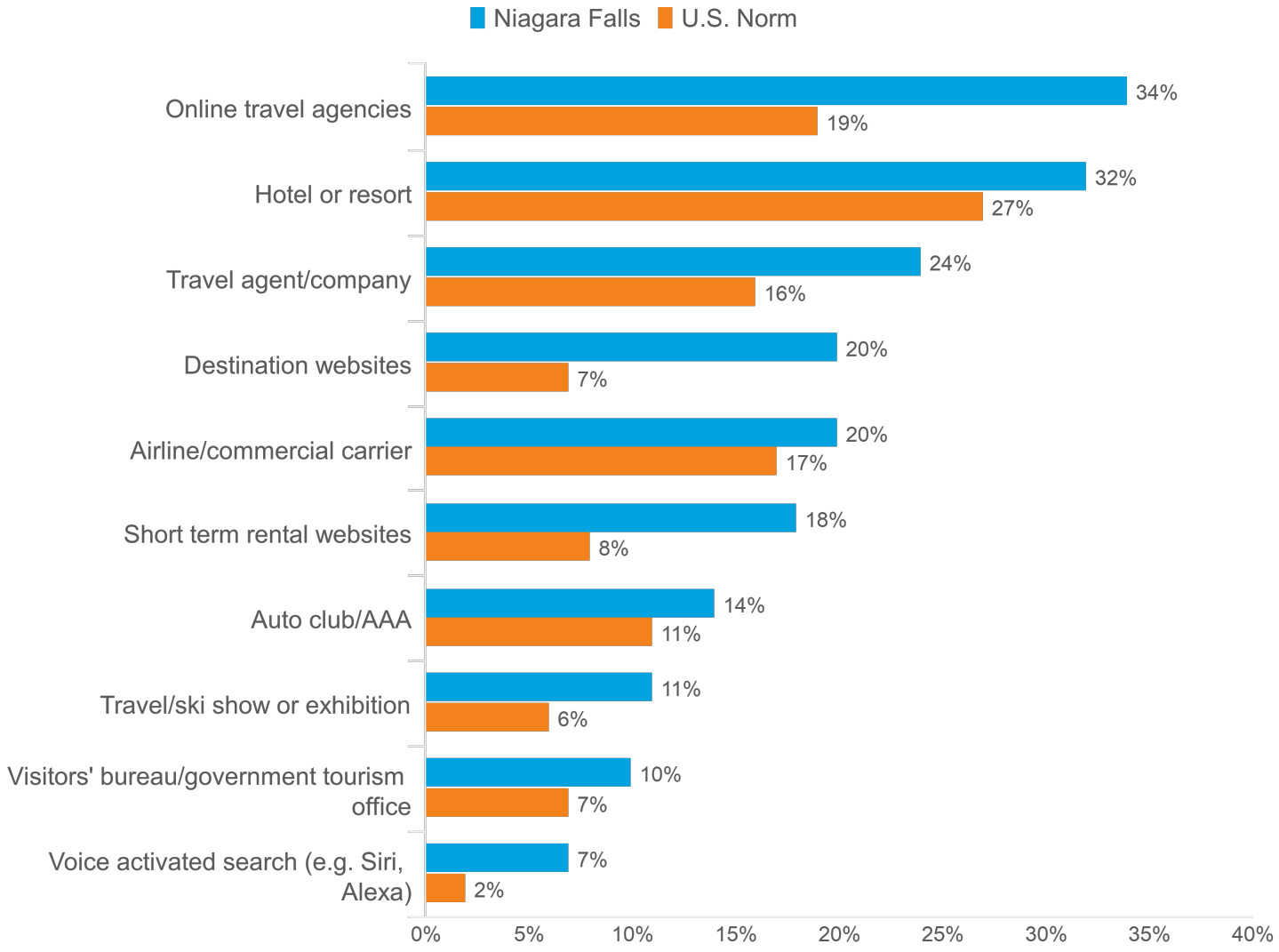
Length of Trip Planning

	Niagara Falls	U.S. Norm
1 month or less	**43%**	**30%**
2 months	**19%**	**15%**
3-5 months	**17%**	**18%**
6-12 months	**11%**	**14%**
More than 1 year in advance	**4%**	**6%**
Did not plan anything in advance	**6%**	**17%**

Niagara Falls's Overnight Trip Characteristics

Base: 2021 Overnight Person-Trips

Method of Booking



Accommodations

	Niagara Falls	U.S. Norm
Hotel	**55%**	**38%**
Home of friends / relatives	**18%**	**19%**
Resort hotel	**18%**	**12%**
Motel	**16%**	**13%**
Bed & breakfast	**15%**	**8%**
Campground / RV park	**11%**	**6%**
Rented home / condo / apartment	**11%**	**6%**

Niagara Falls: During Trip

Base: 2021 Overnight Person-Trips

Activity Groupings

Outdoor Activities

72%

U.S. Norm: 48%

Entertainment Activities

80%

U.S. Norm: 55%

Cultural Activities

54%

U.S. Norm: 29%

Sporting Activities

34%

U.S. Norm: 24%

Business Activities

29%

U.S. Norm: 18%

Activities and Experiences (Top 10)

	Niagara Falls	U.S. Norm
Shopping	38%	22%
Sightseeing	32%	16%
Museum	28%	10%
Landmark/historic site	27%	11%
National/state park	24%	7%
Casino	23%	10%
Swimming	23%	12%
Nature tours/wildlife viewing/birding	20%	7%
Attending celebration	20%	13%
Art gallery	17%	7%

Niagara Falls: During Trip

Base: 2021 Overnight Person-Trips

Shopping Types on Trip

	Niagara Falls	U.S. Norm
Outlet/mall shopping	60%	47%
Souvenir shopping	52%	39%
Big box stores (Walmart, Costco)	43%	33%
Convenience/grocery shopping	43%	42%
Boutique shopping	39%	28%
Antiquing	17%	13%

Base: 2021 Overnight Person-Trips that included Shopping

Dining Types on Trip

	Niagara Falls	U.S. Norm
Unique/local food	54%	40%
Food delivery service (UberEATS, DoorDash, etc.)	39%	21%
Fine/upscale dining	38%	22%
Street food/food trucks	35%	21%
Picnicking	23%	14%
Gastropubs	19%	10%

Niagara Falls: During Trip

Base: 2021 Overnight Person-Trips

68%

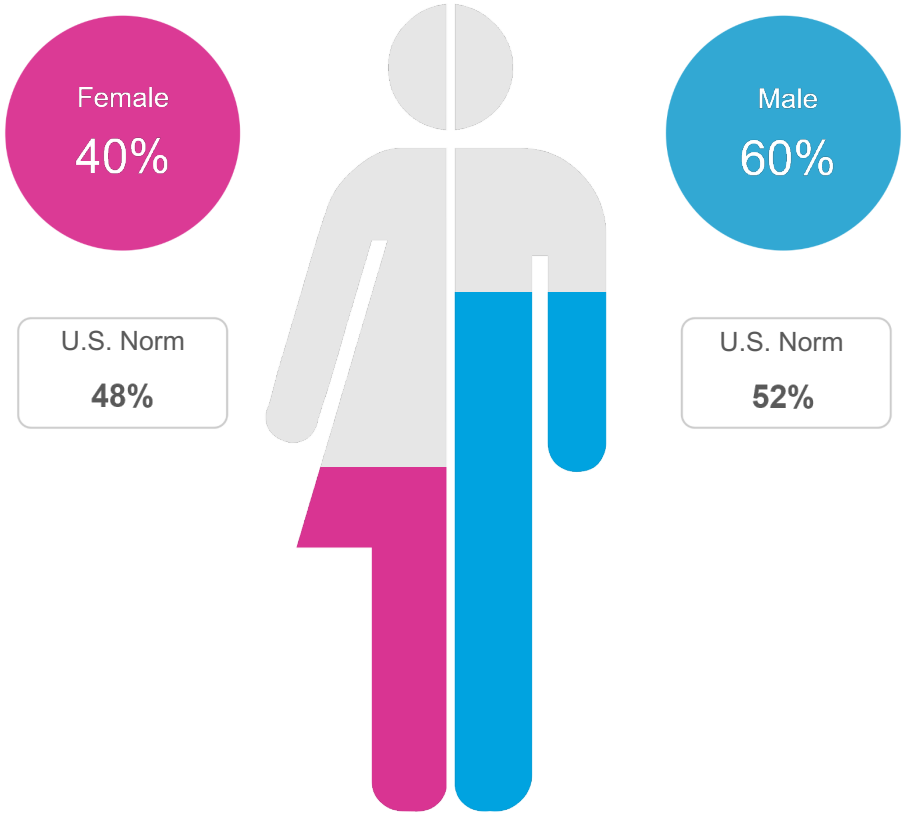
of overnight travelers were very satisfied with their overall trip experience

Question updated in 2020

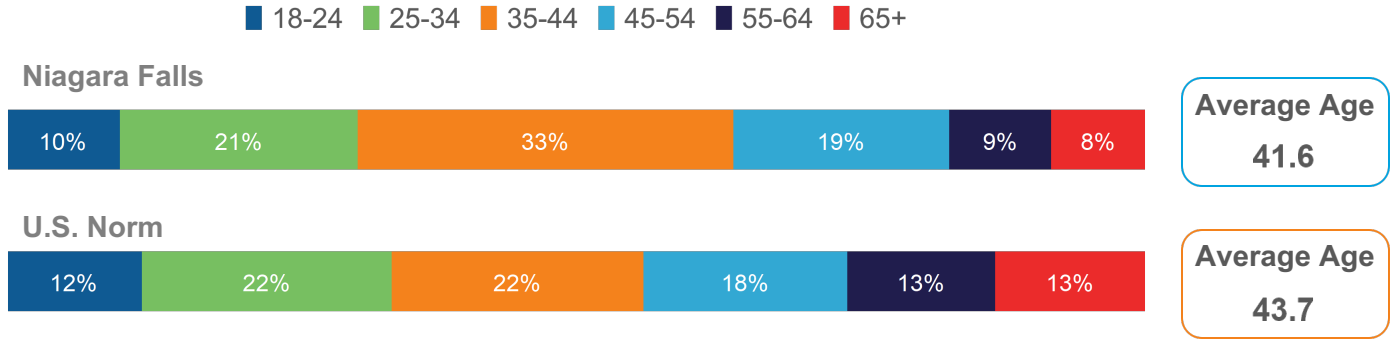
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2021 Overnight Person-Trips

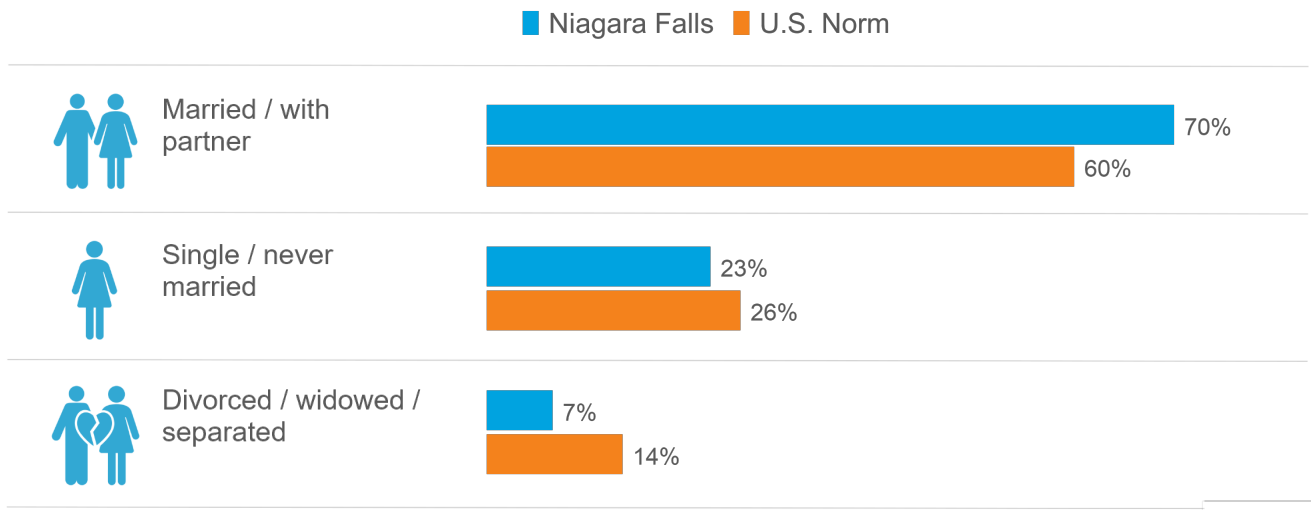
Gender



Age



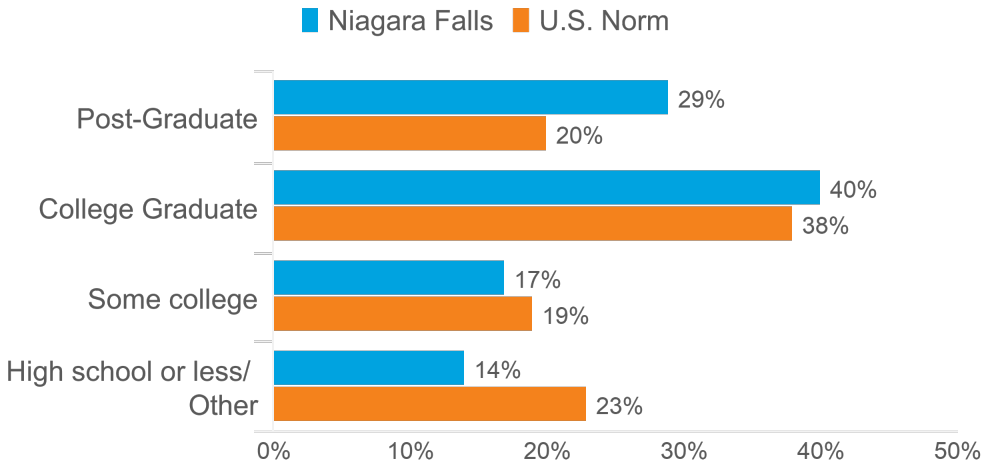
Marital Status



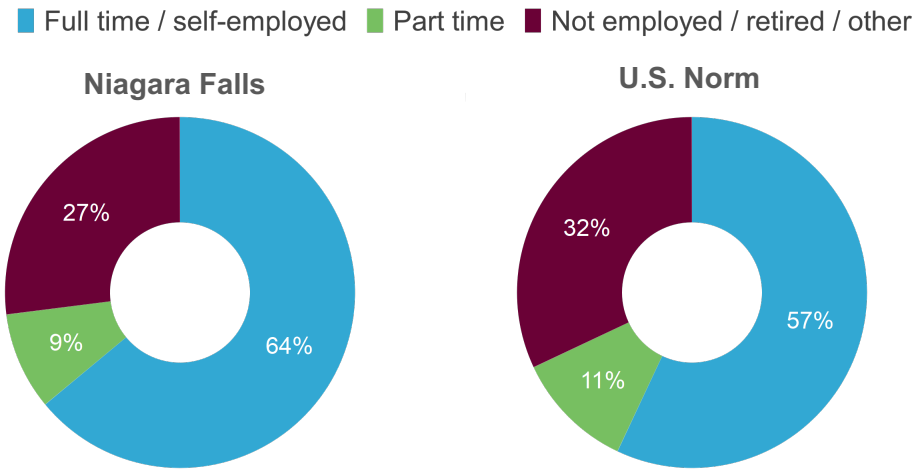
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2021 Overnight Person-Trips

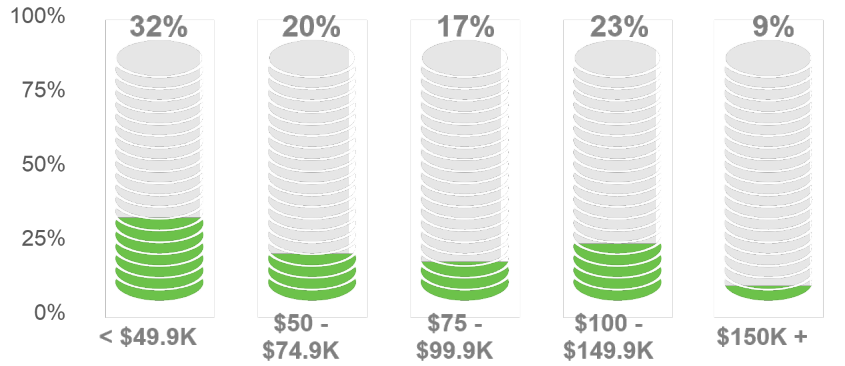
Education



Employment

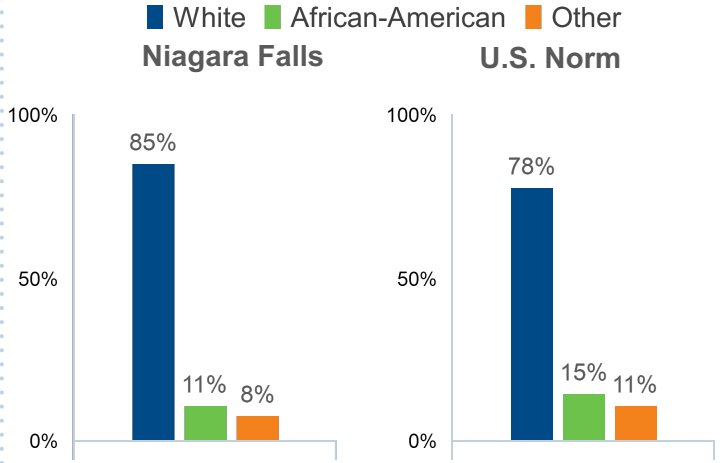


Household Income

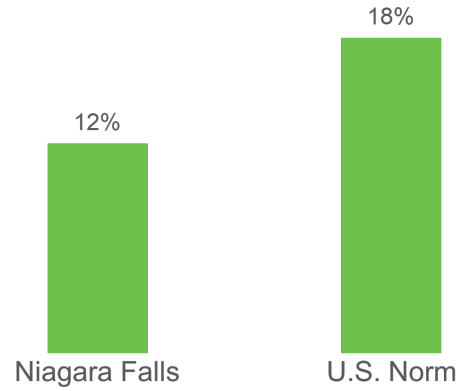


	< $49.9K	$50 - $74.9K	$75 - $99.9K	$100 - $149.9K	$150K +
U.S. Norm	41%	20%	15%	17%	8%

Race



Hispanic Background



Demographic Profile of Overnight Niagara Falls Visitors

Base: 2021 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	17%	25%	17%	23%	18%
U.S. Norm	21%	32%	19%	15%	13%

Children in Household

Niagara Falls

No children under 18	40%
Any 13-17	24%
Any 6-12	45%
Any child under 6	26%

U.S. Norm

No children under 18	50%
Any 13-17	22%
Any 6-12	29%
Any child under 6	20%

Longwoods INTERNATIONAL

COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Day Visitation

NIAGARA FALLS™ USA

WHERE ADVENTURE COMES NATURALLY

2020/2021

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2020 and 2021 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes and expenditures represent 2021 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Niagara Falls, the following sample was achieved in 2020/2021:

Day Base Size

241

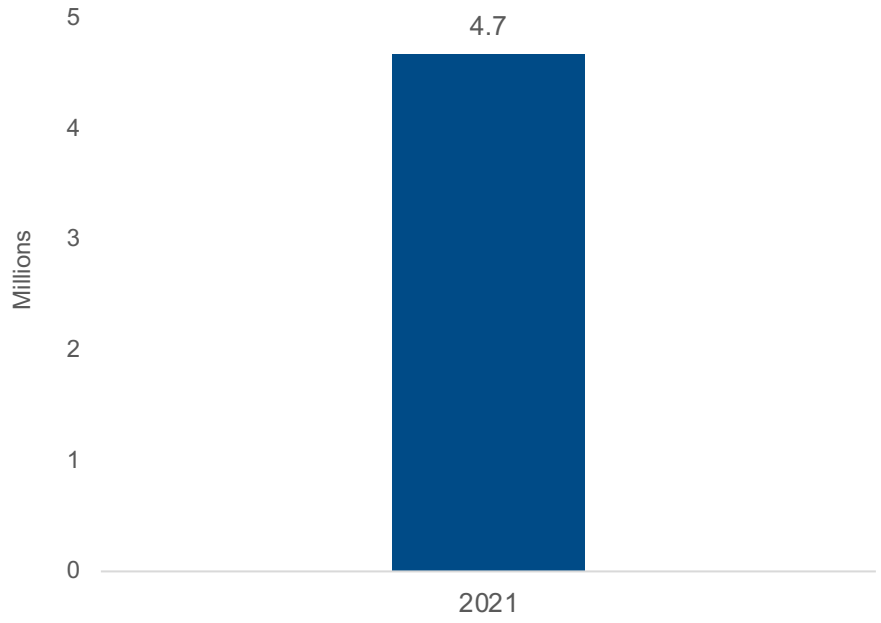
A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Size and Structure of Niagara Falls's Domestic Travel Market

Base: 2021 Day Person-Trips

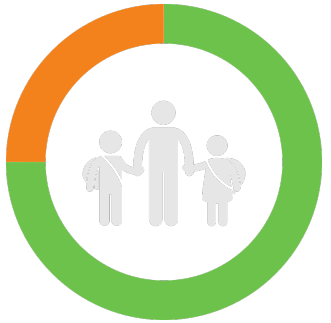
Day Trips to Niagara Falls



Size of Niagara Falls Day Travel Market - Adults vs. Children

Total Day Person-Trips

4.7 Million



Adults
75% **3.5 Million**

Children
25% **1.2 Million**

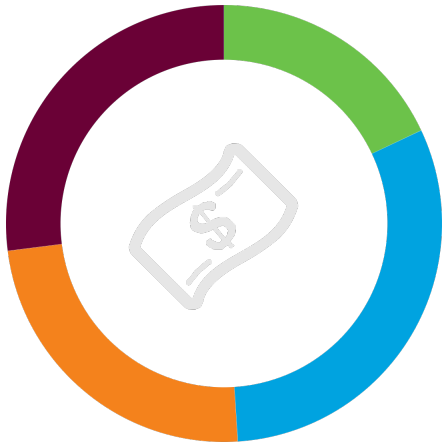
Niagara Falls's Day Trip Expenditures

Base: Total Day Person-Trips
*Caution Low Sample

Domestic Day Expenditures - by Sector

Total Spending

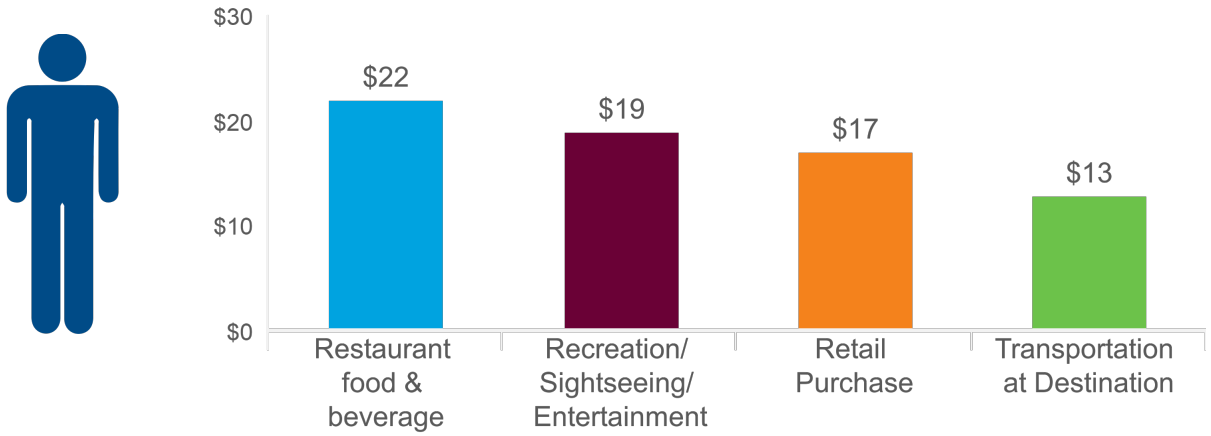
$ 0.333 Billion



Transportation at Destination	18%	$60 Million
Restaurant Food & Beverage	31%	$104 Million
Retail Purchase	24%	$79 Million
Recreation/Entertainment	27%	$91 Million

Average Per Person Expenditures on Domestic Day Trips - by Sector

Average Per Person: $ 71



Niagara Falls's Day Trip Characteristics

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

Main Purpose of Trip

22%
Visiting friends/ relatives

25%
Touring

12%
Casino

9%
Outdoors

8%
City trip

6%
Shopping

2%
Theme park

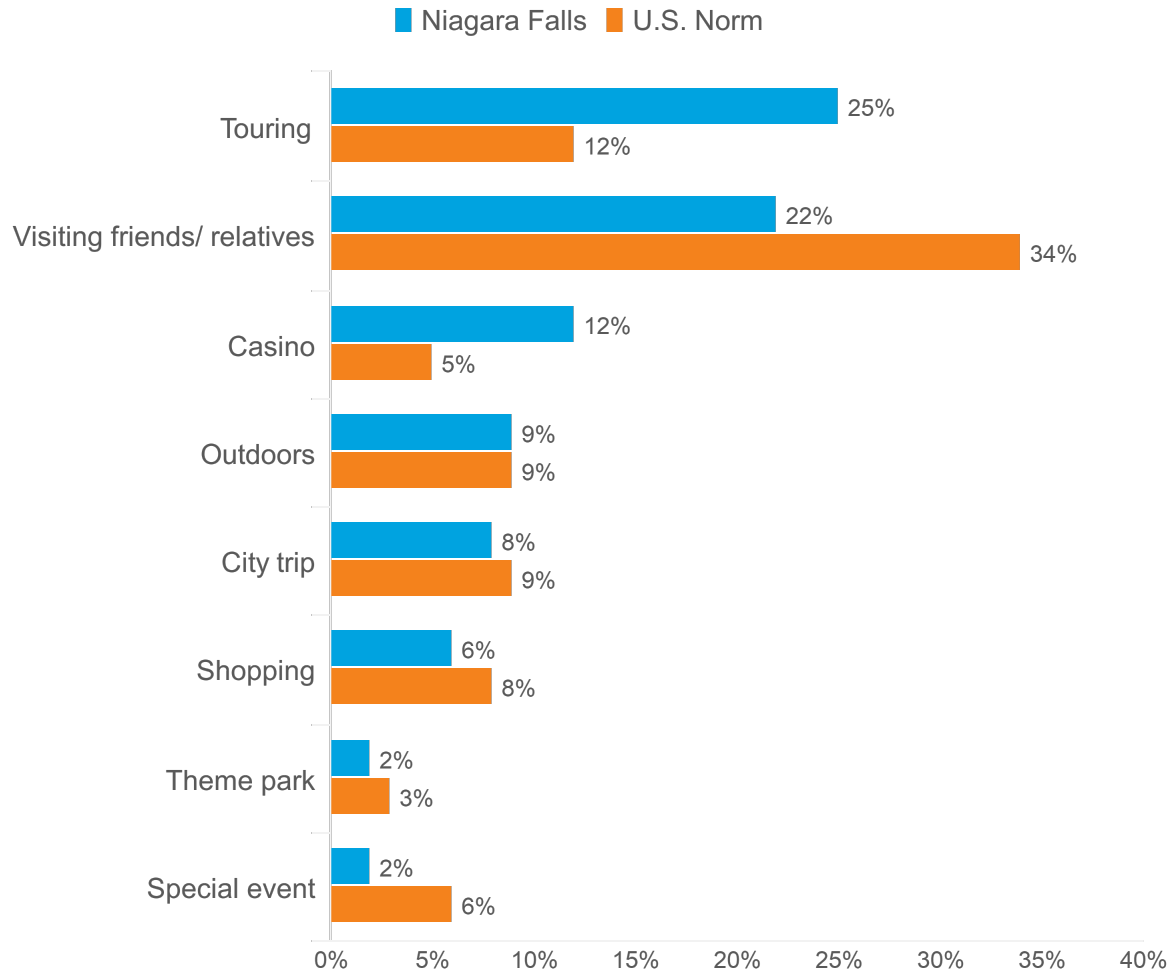
2%
Special event

1%
Conference/ Convention

7%
Other business trip

4%
Business-Leisure

Main Purpose of Leisure Trip



Longwoods INTERNATIONAL

Structure of the U.S. and Niagara Falls Day Travel Market

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

2021 U.S. Day Trips

Visiting friends/relatives	34%
Marketable	58%
Business	5%
Business-leisure	3%

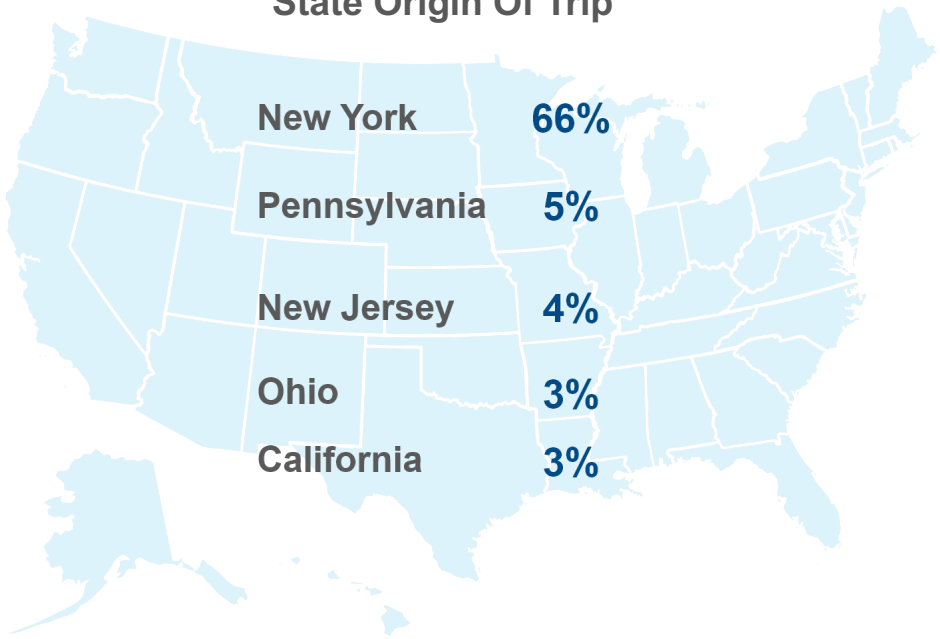
Niagara Falls Day Trips

Visiting friends/relatives	22%
Marketable	66%
Business	7%
Business-leisure	4%

Niagara Falls's Day Trip Characteristics

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

State Origin Of Trip

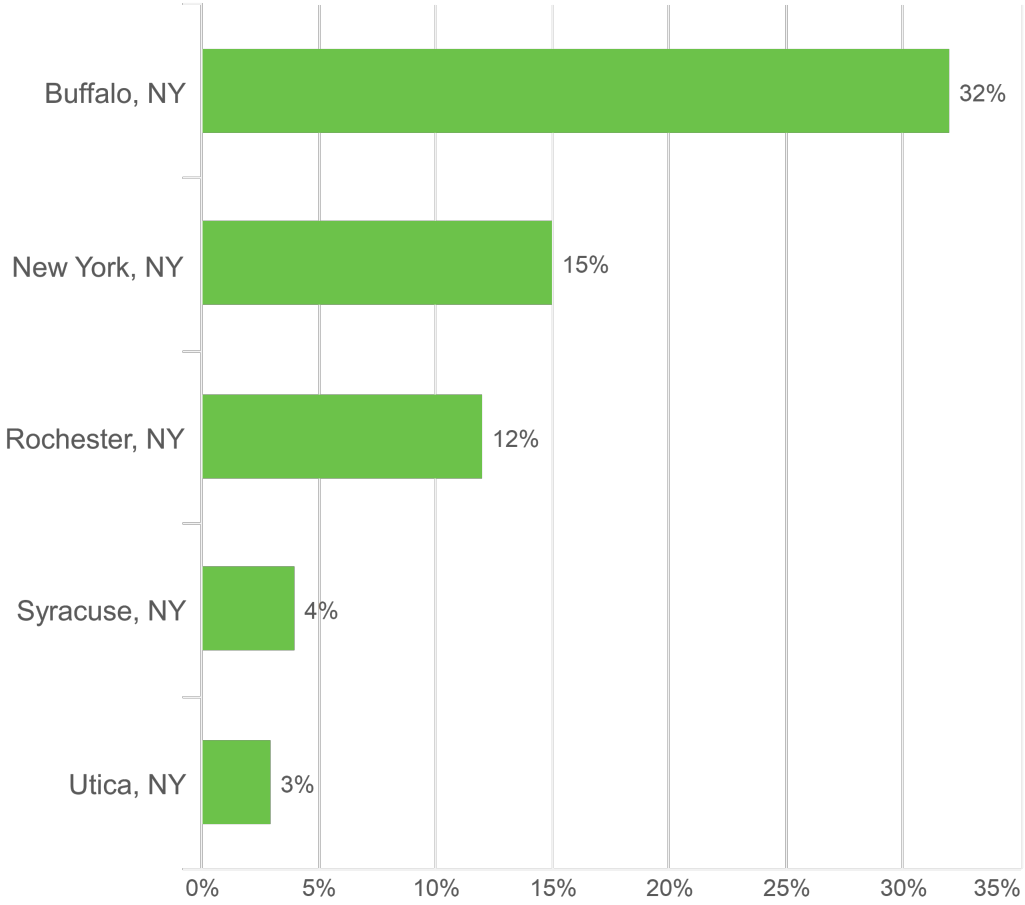


New York	66%
Pennsylvania	5%
New Jersey	4%
Ohio	3%
California	3%

Season of Trip

Total 2021 Day Person-Trips

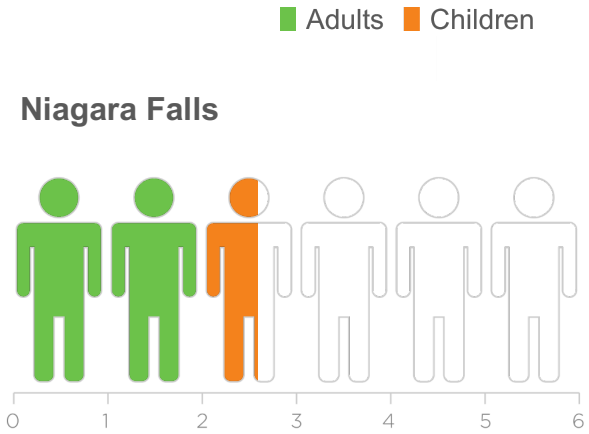
DMA Origin Of Trip



Niagara Falls's Day Trip Characteristics

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

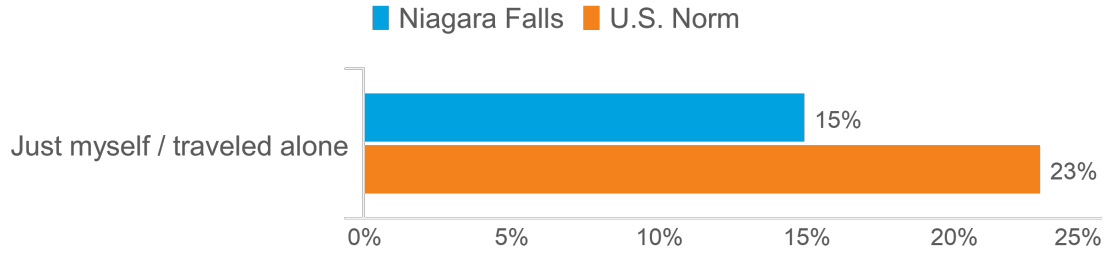
Size of Travel Party



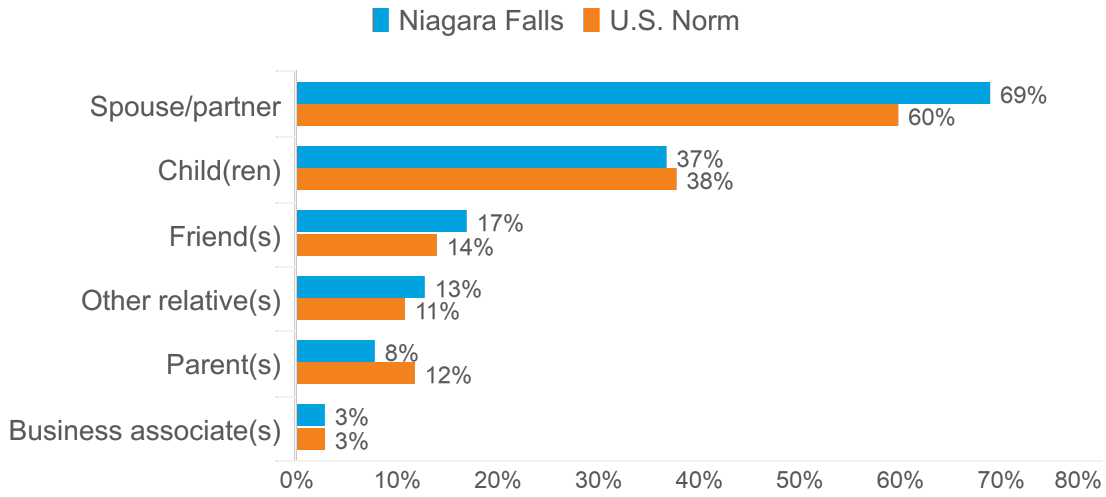
Total
2.8

Total
2.6

Percent Who Traveled Alone



Composition of Immediate Travel Party



Longwoods INTERNATIONAL

Niagara Falls: During Trip

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

Activity Groupings

Outdoor Activities

46%

U.S. Norm: 36%

Entertainment Activities

70%

U.S. Norm: 48%

Cultural Activities

35%

U.S. Norm: 22%

Sporting Activities

11%

U.S. Norm: 17%

Business Activities

15%

U.S. Norm: 14%

Question updated in 2020

Activities and Experiences (Top 10)

	Niagara Falls	U.S. Norm
Sightseeing	33%	11%
Shopping	26%	19%
Landmark/historic site	23%	8%
Casino	21%	7%
Museum	13%	7%
National/state park	13%	5%
Nature tours/wildlife viewing/birding	12%	5%
Hiking/backpacking	12%	5%
Business meeting	11%	6%
Local parks/playgrounds	10%	6%

Niagara Falls: During Trip

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

Shopping Types on Trip

	Niagara Falls	U.S. Norm
Souvenir shopping	**56%**	**24%**
Outlet/mall shopping	**52%**	**46%**
Convenience/grocery shopping	**33%**	**26%**
Boutique shopping	**28%**	**22%**
Big box stores (Walmart, Costco)	**20%**	**28%**
Antiquing	**14%**	**13%**

Base: 2020/2021 Day Person-Trips that included Shopping

Dining Types on Trip

	Niagara Falls	U.S. Norm
Unique/local food	**44%**	**34%**
Fine/upscale dining	**23%**	**15%**
Street food/food trucks	**21%**	**17%**
Picnicking	**19%**	**14%**
Food delivery service (UberEATS, DoorDash, etc.)	**12%**	**15%**
Gastropubs	**11%**	**7%**

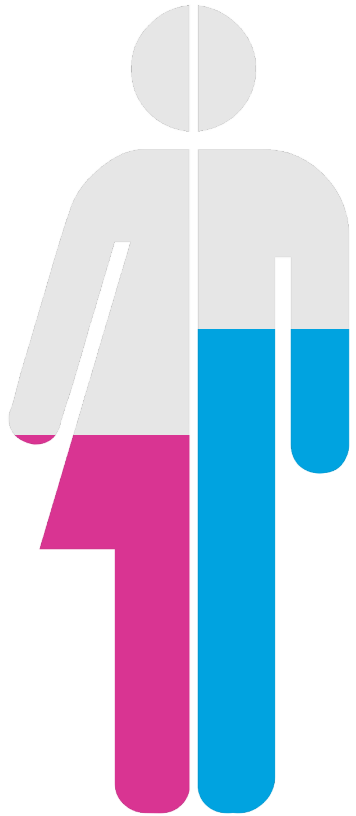
Question added in 2020

Longwoods INTERNATIONAL

Demographic Profile of Day Niagara Falls Visitors

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

Gender



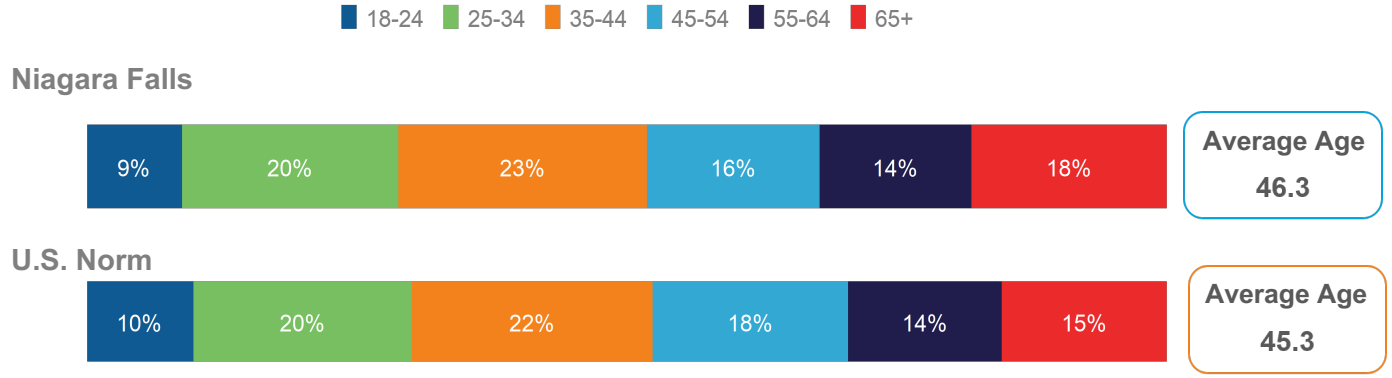
Female
44%

U.S. Norm
49%

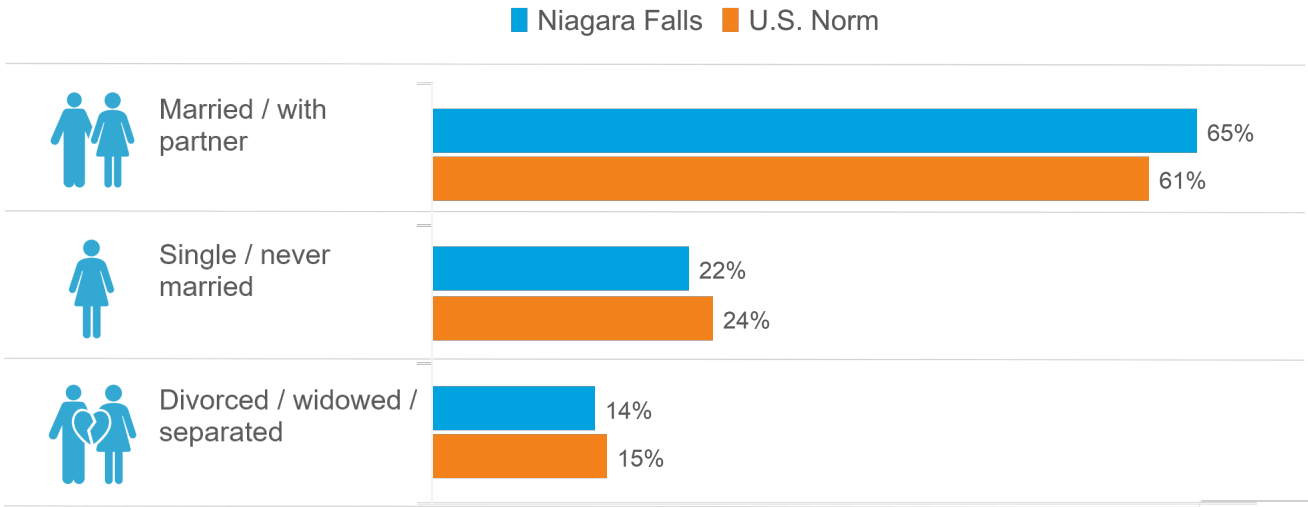
Male
56%

U.S. Norm
51%

Age



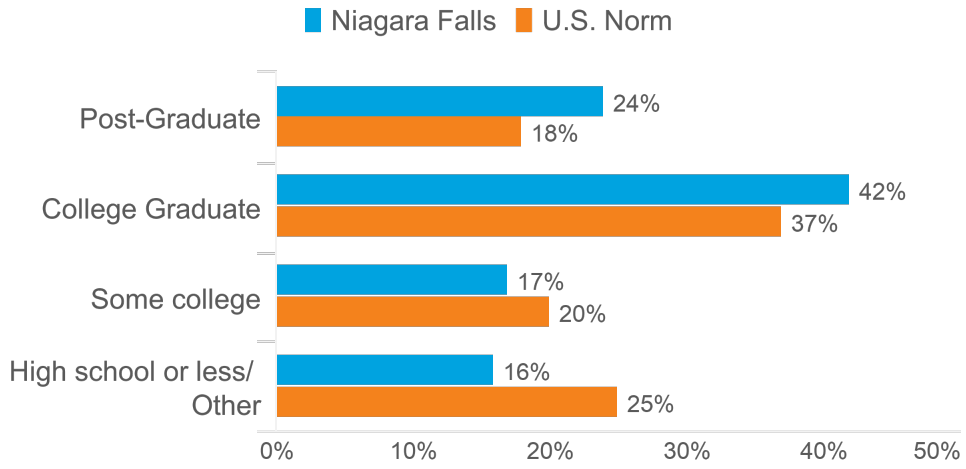
Marital Status



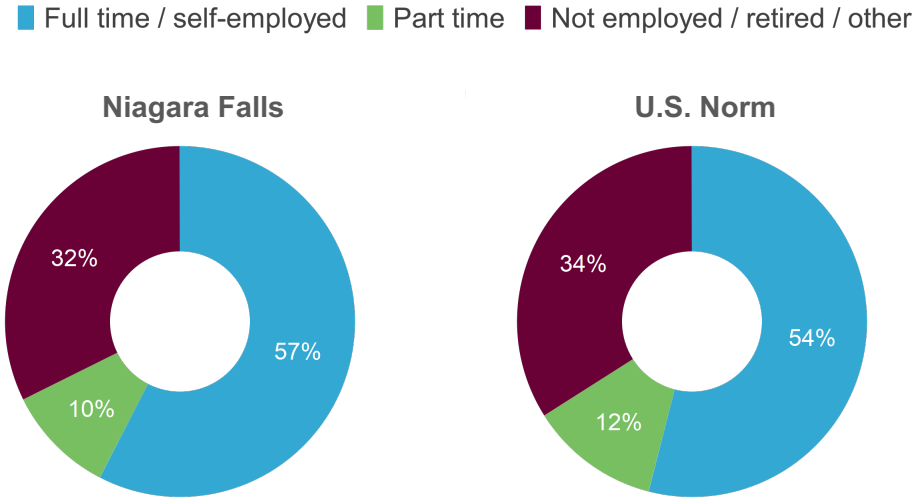
Demographic Profile of Day Niagara Falls Visitors

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

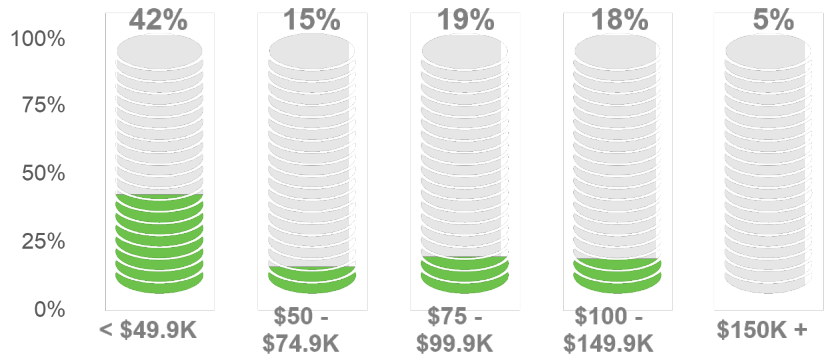
Education



Employment

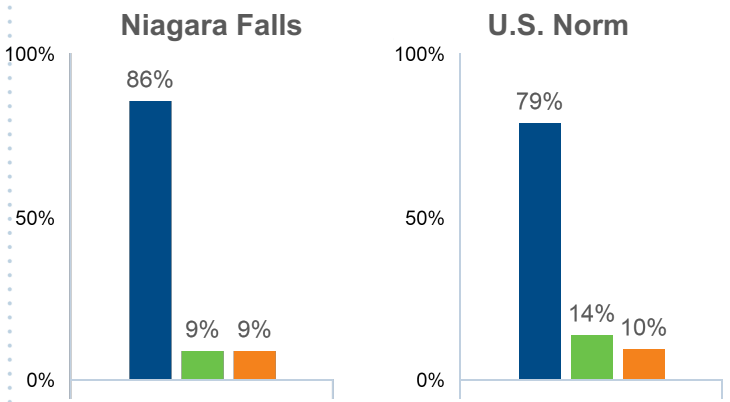


Household Income



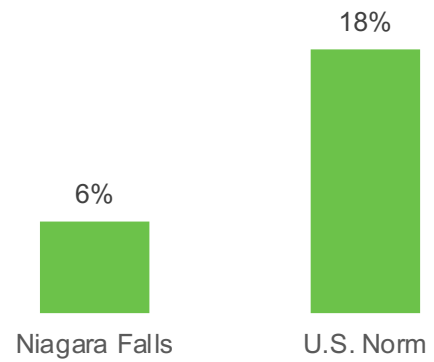
	< $49.9K	$50 - $74.9K	$75 - $99.9K	$100 - $149.9K	$150K +
U.S. Norm	42%	21%	15%	16%	6%

Race



Question updated in 2020

Hispanic Background



Demographic Profile of Day Niagara Falls Visitors

Base: 2020/2021 Day Person-Trips
*Caution Low Sample

Household Size

	1 member	2 members	3 members	4 members	5+ members
	22%	30%	18%	18%	11%
U.S. Norm	21%	33%	20%	14%	11%

Children in Household

Niagara Falls

No children under 18	49%
Any 13-17	20%
Any 6-12	30%
Any child under 6	19%

U.S. Norm

No children under 18	52%
Any 13-17	20%
Any 6-12	28%
Any child under 6	20%

Longwoods INTERNATIONAL

COMPASS
Longwoods
INTERNATIONAL