



Niagara County Fishing Study Visitor Profile & Impact

August 24, 2023





Methodology

An online survey instrument was prepared by the Young Strategies research team in collaboration with Niagara Falls USA. The survey was distributed using Niagara Falls USA consumer database and Facebook page as well as other partners in Niagara Falls that agreed to distribute the survey to their individual databases.

Young Strategies also distributed the survey to a panel of pre-certified respondents who met specific demographic and travel behavior guidelines. A total of 2,672 people were contacted and asked a series of pre-qualification questions in order to participate in the survey. Respondents from the panel had to be from New York, Ohio or Pennsylvania and reported that they have been fishing in Niagara Falls, NY.

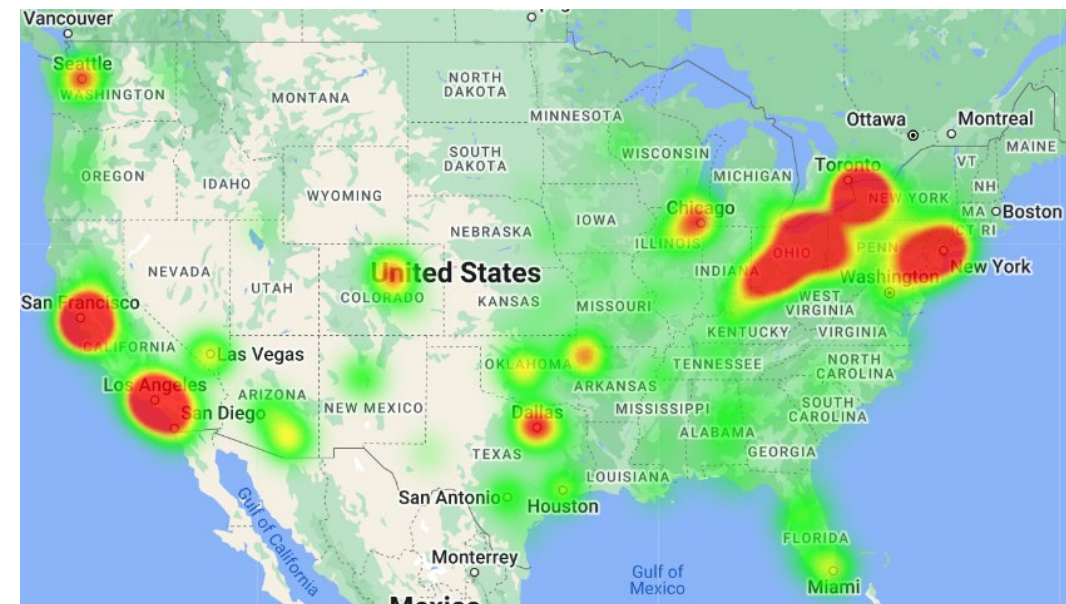
A total of 1,165 respondents qualified to complete the survey based on this criteria from both the Niagara Falls USA and partner databases as well as the panel of pre-certified respondents.

- New York – 455
- California – 168
- Pennsylvania – 156
- Ohio – 122
- Florida – 99
- Connecticut – 45
- Colorado – 40
- All other states – 503
- Canada -- 9

Key Findings

- Fishing has a significant year-round economic impact on Niagara County, NY
- Average spending per fishing party = \$2,187 with charter anglers spending most
- An average of four people in a fishing party who stay 3.6 nights
- The vast majority of survey respondents were male with the exception of those who participated in Reelin'for A Cure, a female only fishing tournament
- Anglers come primarily from the drive market but also all over the USA
- Western/southern anglers come for the combo of cold-water fishing and other activities
- High repeat visitation reveals high satisfaction with the experience
- First-time anglers reveal the impact of advertising/promotions to attract them
- Nearly all respondents expressed intent to return to Niagara County

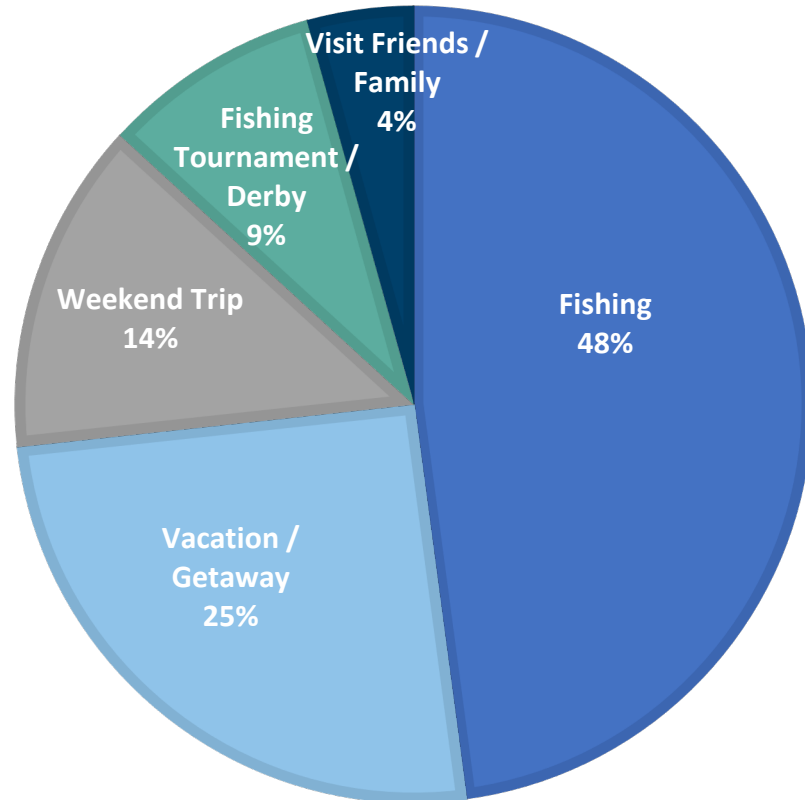
Heat Map of Survey Respondents Point of Origin





Trip Characteristics

Please tell us the MAIN purpose for your last trip to Niagara County, NY? $n=1,120$

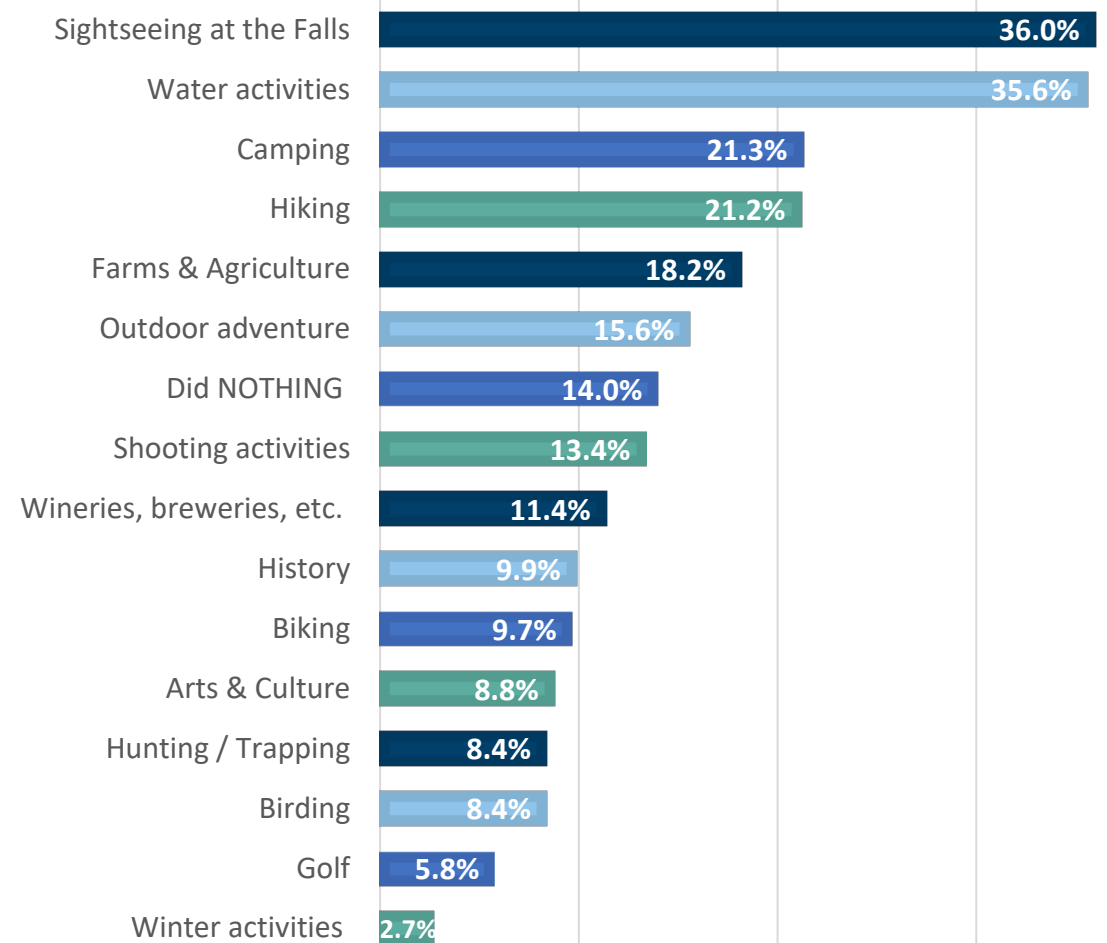


Observation:

57% of survey respondents indicated that fishing was their primary reason for visiting Niagara County. The remaining respondents indicated other primary intentions in visiting with fishing being one of their activities while in the area.

The iconic appeal of Niagara Falls broadens the fishing experience beyond just fishing.

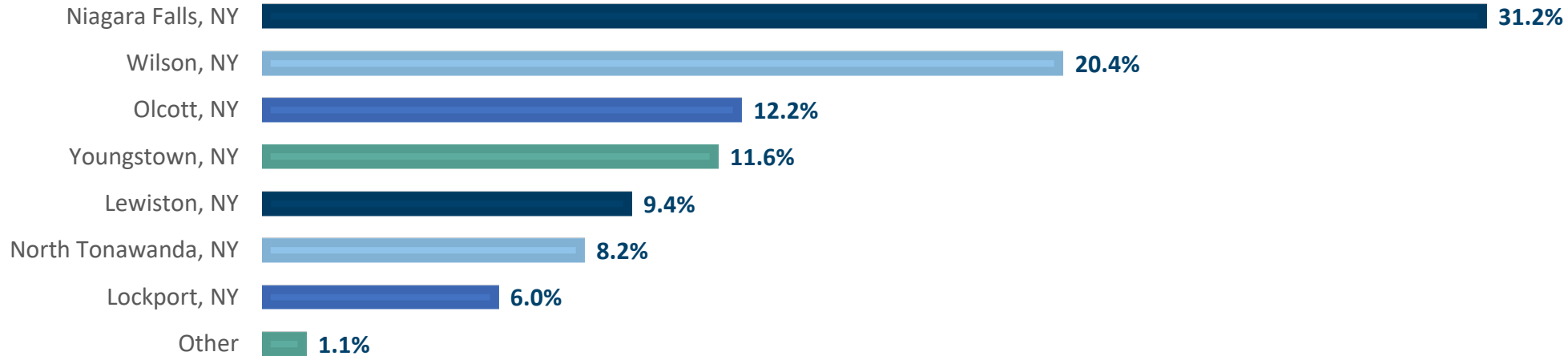
Other than fishing, what activities did you / someone in your travel party participate during your most recent fishing trip to Niagara County NY? $n=1,056$



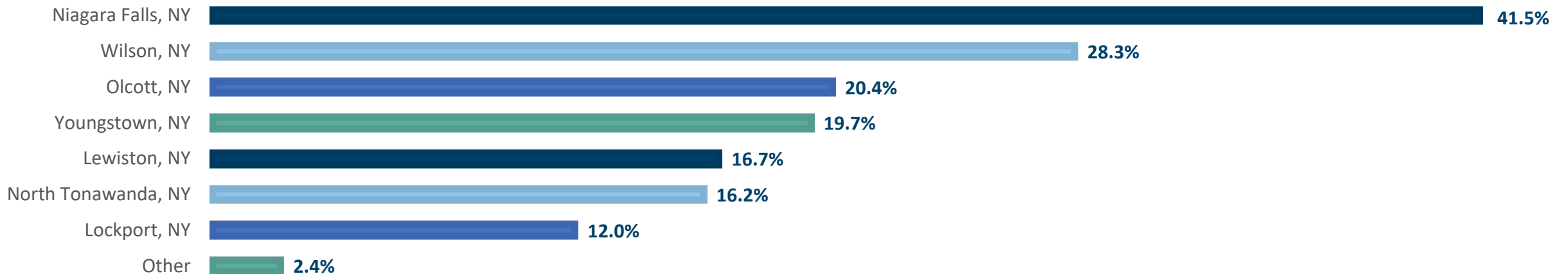


Trip Characteristics

Which town / community was the PRIMARY destination of your most recent trip to Niagara County, NY? n=1,140



Please tell us ALL towns / communities you / someone in your travel party visited during your most recent trip to Niagara County, NY? n=1,140

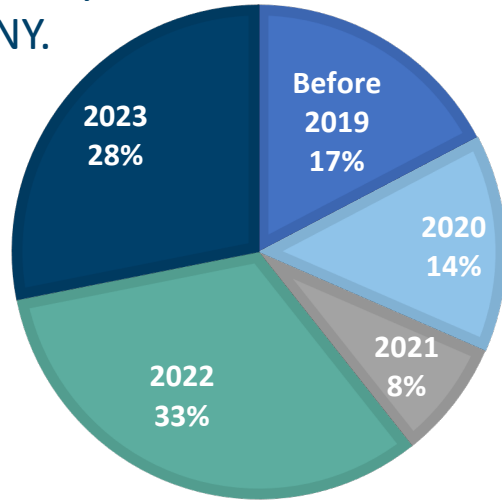




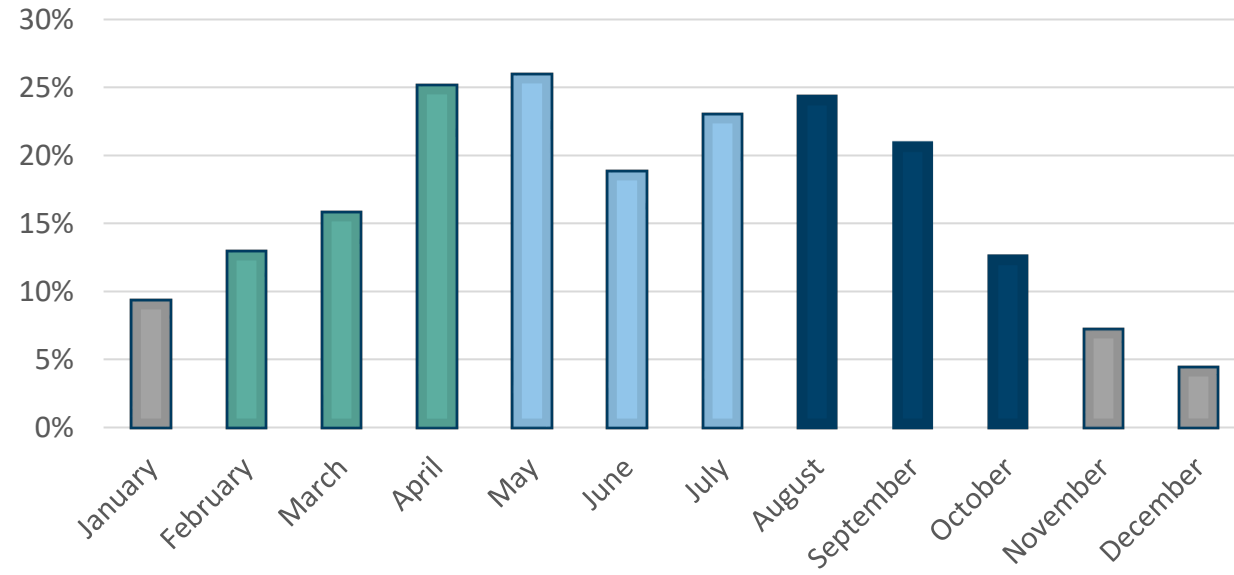
Trip Timing / Planning

Please tell us the year of your most recent fishing trip to Niagara Falls, NY.

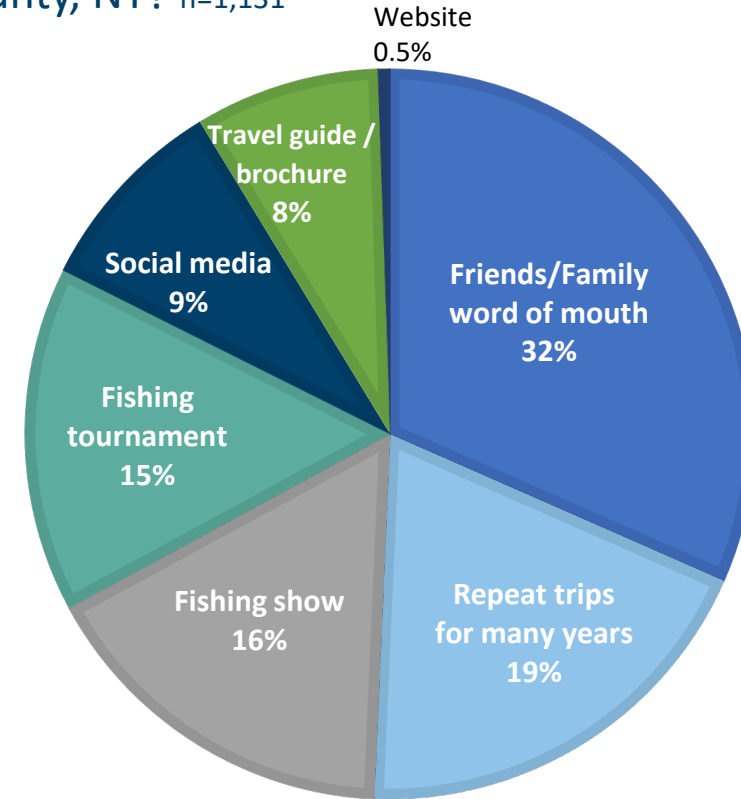
n=1,133



In which month did you fish Niagara County, NY? n=1,133



How did you first hear about fishing in Niagara County, NY? n=1,131



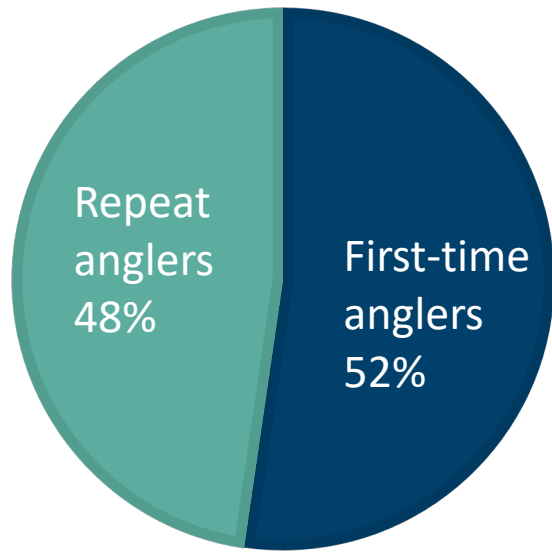
Almost 1/3 of anglers (31.7%) reported first hearing about fishing in Niagara County, NY from either a fishing tournament or fishing show!
 Nearly half were inspired by some form of marketing/promotion.



Repeat Anglers

Was this your first fishing trip to Niagara County, NY?

n=1,118



Observation:

High repeat visitation reveals loyalty and high satisfaction while first time visitation is the result of marketing/promotion as well as word-of-mouth.

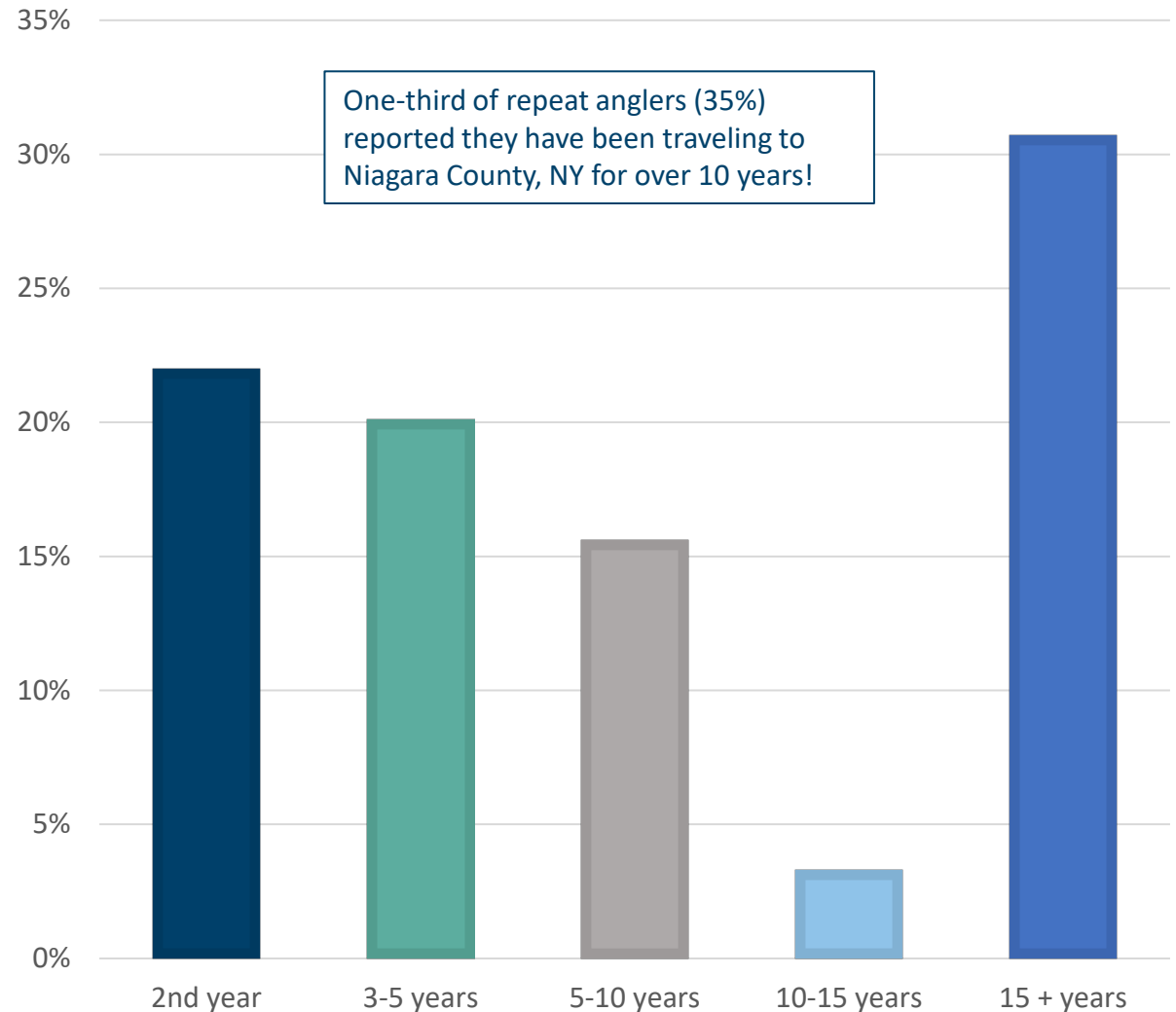
For fishing or fishing related activities, repeat anglers traveling to Niagara County, NY reported: (n=553)

- 43% travel **SEASONALLY** (3-4 times a year)
- 25% travel **ANNUALLY** (once a year)
- 22% travel **MONTHLY** (10-12 times a year)
- 10% reported **not traveling regularly** to Niagara County, NY

Repeat anglers:

74% **ALWAYS** travel to Niagara for fishing in the same season(s). (n= 541)

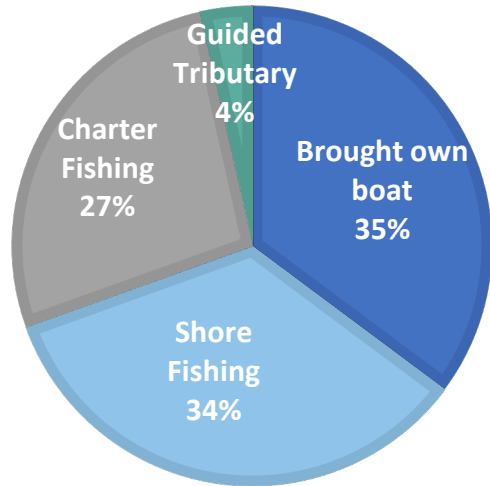
How many years have you been traveling to Niagara County, NY for fishing related activities? n=551





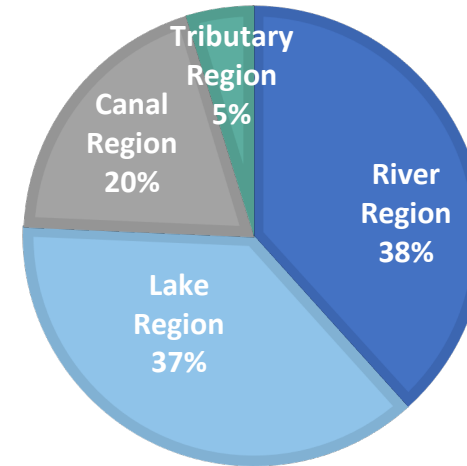
Fishing Characteristics

What type of fishing did you participate in during your most recent trip to Niagara County, NY? n=1,121

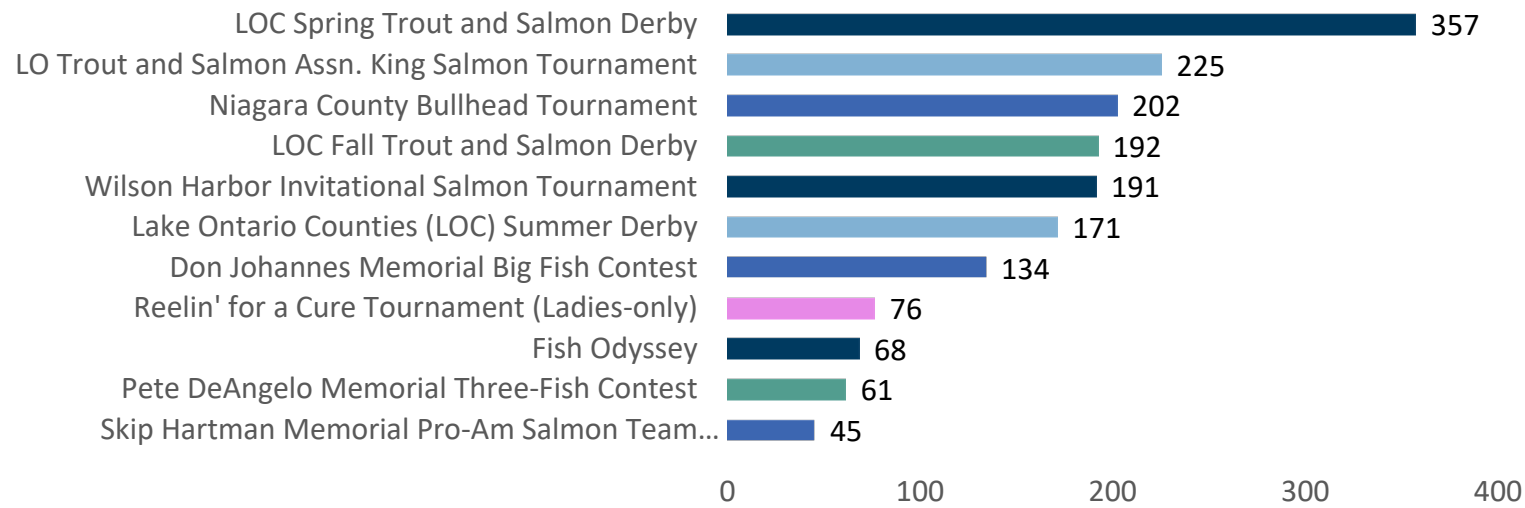


82% of anglers reported their group went out on their own, 18% reported chartering a fishing trip with an experienced captain.

Which waterway in Niagara County, NY did you fish during your most recent fishing trip? n=1,120



Did you or someone in your group participate in any of the following fishing tournaments or derbies? n=917

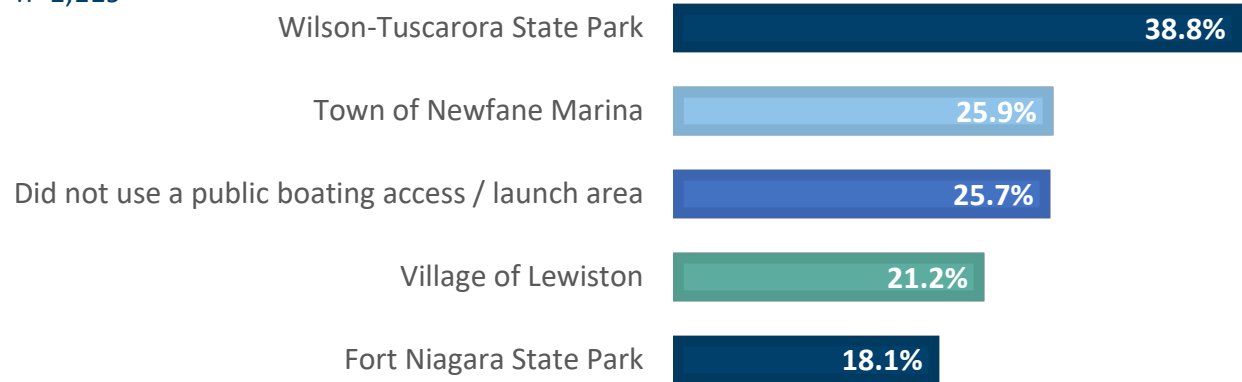




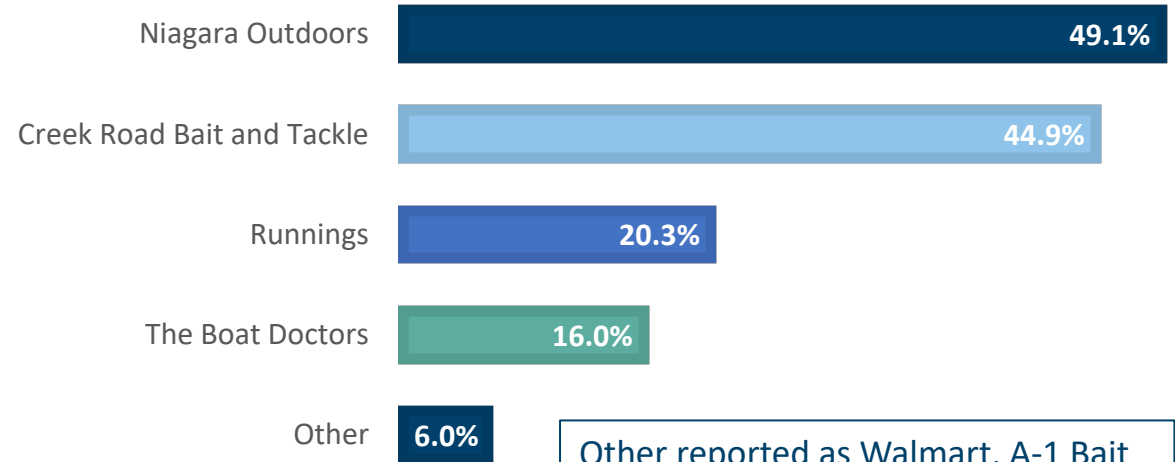
Fishing Characteristics

Did you use a public boating access / launching area on your most recent fishing trip to Niagara County NY?

n=1,119



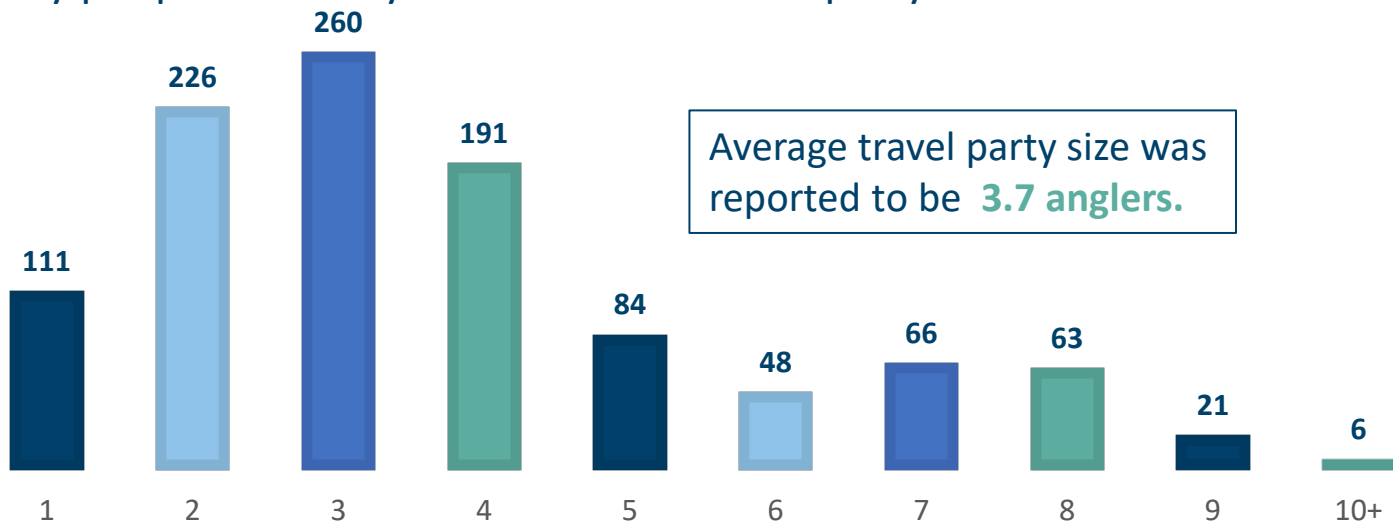
Did you visit any of the following on your most recent fishing trip to Niagara County NY? n=954



Other reported as Walmart, A-1 Bait Supply, Les Allen, Cabela's and Dick's.

How many people were in your immediate travel party?

n=1,076

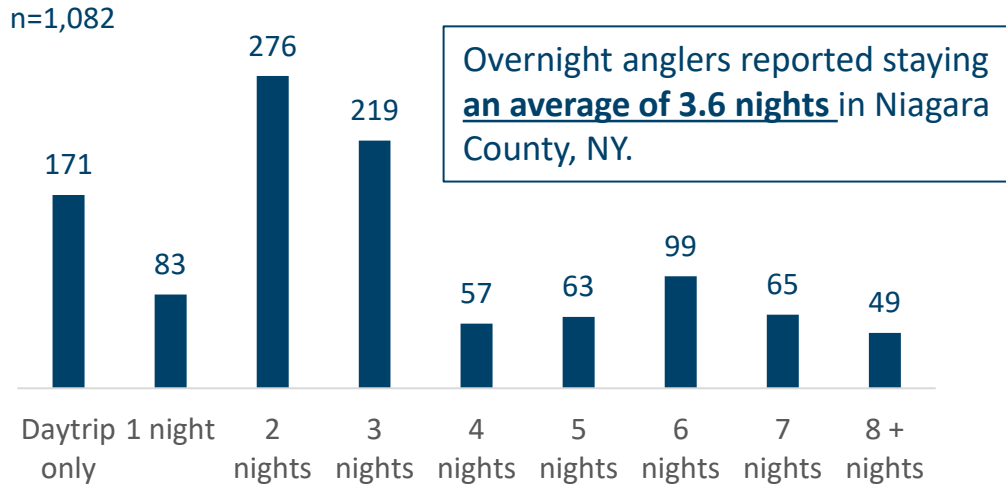


Average travel party size was reported to be **3.7 anglers.**



Trip Characteristics

How many nights did you stay in Niagara County, NY during your most recent fishing/fishing-related trip?



Overnight anglers: How Where did you stay during your most recent fishing / fishing related trip to Niagara County, NY? n=898

- **37%** hotel / motel
- **34%** friends or family condo / house / townhouse
- **15%** campground / RV park
- **13%** vacation rental
- **1%** bed & breakfast

The majority of overnight anglers stayed in **paid accommodation**.

Average spending immediate travel party on most recent trip to Niagara County, NY:

Average Spend	Overall n=920	Charter Fishing n=154	Independent Fishing n=766
Lodging / rental	\$733.35	\$687.52	\$790.34
Meals / dining out / groceries	\$450.93	\$415.84	\$465.52
Shopping	\$463.48	\$523.71	\$421.34
Transportation	\$377.18	\$485.25	\$234.75
Fishing- bait / tackle / gear / etc.	\$455.48	\$724.51	\$315.24
Average spend per travel party	\$2,186.65	\$2,314.67	\$1,897.25

Average spend per fishing travel party = \$2,187

- Charter fishing anglers tend to spend more during slightly shorter stays.
- Anglers coming from the western & southern states tend to fly and utilize charter fishing and guide services thus higher transportation & fishing expenses & lower lodging costs.



Future Travel Plans

What other places do you travel for fishing / fishing related activities? n=729

Lake Erie	72	Fairport	6	New Mexico	4	Youngstown	3	North Dakota	2	Barcelona, NY	1	Cayuga County	1	Easton, PA	1	Holmes Lake	1
Hawaii	50	Houston	6	Ocean City, MD	4	Alaska	2	N. Tonawanda	2	Bath	1	Cayuga Lake	1	Eire County	1	Homer Alaska	1
Florida	47	Michigan	6	Ontario	4	Allegheny	2	Ohio	2	Beach	1	Central PA	1	Elephant Island	1	Hoover Dam	1
Alaska	34	Michigan	6	Sodus	4	Arizona	2	Oregon	2	Bear Mountain	1	Charleston WV	1	Ellicott Creek	1	Idaho	1
Miss. River	26	North Carolina	6	Mississippi	4	Brown County	2	Port Clinton, OH	2	Belton Lake	1	Charleston, SC	1	Evans, NY	1	Indiana	1
Niagara Falls	17	Olcott	6	Wheatley Park	4	Buffalo	2	Porter	2	Berlin Lake	1	Chaumont Bay	1	Everglades Fl	1	Indiana	1
Kenai Peninsula	16	Oswego	6	Buffalo River	3	Cabo San Lucas	2	Pymatuning PA	2	Big Long Lake	1	Chautauqua	6	Fiji	1	Inland Lakes	1
Canada	14	Table Rock Lake	6	California	3	California Pier	2	Raystown Lake	2	Biscayne NP	1	Chicago	1	Forrest Park	1	Irondequoit Bay	1
Ohio	14	Anderson Lake	5	Canada	3	Catskill Mtns.	2	Riverside	2	Black Creek	1	Cleveland	1	Fort Niagara	1	Islamorada	1
1000 Islands	13	Bronx	5	Delaware River	3	Chesapeake	2	Rochester	2	Black Lake	1	Coco Beach	2	Fort Niagara	1	Johnson Creek	1
Pennsylvania	13	Colorado	5	Georgia	3	Chicago	2	Salmon River	2	Blackstone	1	Colorado	1	France	1	Kansas	1
Finger Lakes	12	Costa Rica	5	Harlem Meer	3	Clayton	2	Silver Creek, NY	2	Boat Harbor NY	1	Colorado River	1	Franklin Park	1	Keg Creek	1
Erie County	11	Florida Keys	5	Kona, HI	3	Delaware Cty.	2	South Carolina	2	Boating	1	Columbia	1	Ft Lauderdale	1	Kent, NY	1
Oak Orchard	11	Louisiana	5	Lake Michigan	3	Gulf Of Mexico	2	Tennessee	2	Bora Bora	1	Columbus	1	Ft Myers Beach	1	Kenya	1
Erie, PA	10	New Jersey	5	Lakes	3	Hawaii	2	Wisconsin	2	Boston Harbor	1	Conesus	1	Galveston Island	1	Kenzie	1
Kenai College	10	Oneida Lake	5	Long Island	3	Henderson Hbr	2	Willson	2	Boston	1	Coney Island	1	Galveston, Texas	1	Kinzua Dam	1
New York	10	Oregon	5	Maryland	3	Hokkaido	2	Wyoming	2	Bourne	1	Conneaut, OH	1	Gatlinburg	1	Kissena Lake	2
Detroit River	9	Seneca Lake	5	Mexico NY	3	Iowa	2	7 Lakes	1	Brown County	1	Connecticut	1	Good Year Lake	1	Lake Anna	1
Orleans County	9	Virginia	5	Newfoundland	3	Kentucky	2	Acrylic Farm	1	Buckeye Lake	1	Connecticut	1	Grand Island	1	Lake Arthur, PA	1
Oswego	9	Walmart	5	Niagara River	3	Key West	2	Altmar NY	1	Buffalo	1	Connecticut Rvr	1	Great Barrier	1	Lake Austin	1
Boating	8	Yellowstone NP	5	Niagara River	3	Kobuk River	2	Arcade	1	Buffalo Harbor	1	CT Coast	1	Green Harbor	1	Lake Erie	1
Lake Murray	8	Alabama	4	Ny	3	Lake Champlain	2	Arizona	1	Buffalo, NY	1	Cumberland	1	Grimsby	1	Lake Eufaula	1
Maine	8	Arkansas	4	Ohio River	3	Lake George	2	Aruba	1	Burt Dam	1	Dale Hollow TN	1	Gulf Coast AL	1	Lake George	1
Lake Ontario	7	California	4	Ontario, Canada	3	Lockport	2	Ashtabula River	1	Calendar Bay	1	Daytona Florida	1	Gulf Of Mexico	1	Lake George, NY	1
Lewiston	7	Central Park	4	Panama	3	Los Angeles	2	Ashville, Nc	1	Canasa	1	Deep Creek	1	Gulf Shores AL	1	Lake Huron	1
Pulaski, NY	7	Dunkirk, NY	4	Pennsylvania	3	Louisiana	2	Athens, Ohio	1	Captree NY	1	Deercreek	1	Hargus Lake	1	Lake Lewis	1
Texas	7	Florida	4	Point Breeze	3	Miami	2	Atlantic City	1	Caribbean	1	Delaware	1	Henries Lake	1	Lake Michigan	1
Wilson	7	Kentucky	4	Roscoe	3	Minnesota	2	Atlantic	1	California	1	Delta Region	1	Highland Park	1	Lake Milton	1
Adirondacks	6	Key West	4	San Diego	3	Montana	2	Bahamas	1	Catskills	1	Delu Lake	1	Hiking Hills	1	Lake Nipigon	1
Cape Cod	6	Long Island	4	Sandusky, OH	3	Myrtle Beach	2	Baltimore	1	Cattaraugus Cty.	1	Denver	1	Hilton Head, SC	1	Lake Oneida	1
Clear Lake	6	Martha's Vyrd	4	Seattle	3	Nevada	2	Bank Mail	1	Cattaraugus Crk.	1	Destin	1	Hogansburg NY	1	Lake Ontario	1
Fair Haven	6	Nebraska	4	Virginia Beach	3	Niagara	2	Barcelona Hbr.	1	Caves	1	Devils Hole SP	1	Hokkaido Japan	1	Lake Placid	1

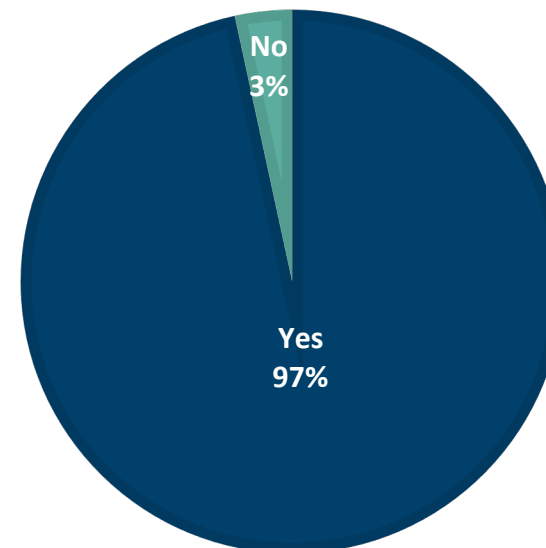


Future Travel Plans

What other places do you travel for fishing / fishing related activities? *(continued)* n=729

Lake Redman	1	New Jersey	1	Potter County	1	Syracuse	1
Lake Superior	1	New Jersey Lake	1	Presque Isle	1	Tampa Bay	1
Lakes In PA	1	New Orleans	1	Prince Edward	1	Tampa Florida	1
Lakeside Beach	1	New York	1	Promised Land	1	Tennessee	1
Lakeside SP	1	Niagara County	1	Quebec	1	The Outerbanks	1
Lewiston	1	Niagara Falls	1	Riverside Creek	1	Tributaries	1
Liverpool	1	Niagara Pro Am	1	Road Island	1	Turkey	1
LOC Fall Derby	1	Norris Lake	1	San Francisco	1	Unique	1
Long Beach	1	North Carolina	1	Santiago	1	Up The Hudson	1
Lorain, OH	1	N. Tonawanda	1	Sarasota Florida	1	Valley Forge	1
Madison River	1	Northern NY	1	Schermerhorns	1	Vermont	1
Maine/Crabbing	1	N. Ontario	1	School Tiger	1	Walnut Creek	1
Mami Beach	1	NW Ontario	1	Scioto River	1	Washington	1
Marathon Key	1	NW PA	1	Seaside	1	WA State	1
Marble Head	1	NYC	1	Season Dock	1	West Virginia	1
Mastic	1	Oberlin, OH	1	Secret Caverns	1	Westbrook	1
Mau Ming	1	Oil Creek	1	Seven Lakes	1	W. Lake Erie	1
Maxwell Bay	1	Olcott	1	Shanago Lake	1	Wild Fishing	1
Medora In	1	Old Orchard	1	Sheepeshead	1	Woods	1
Mill Basin	1	Olympic NP	1	Snake River	1	Worldwide	1
Mississippi	1	Oneida, NY	1	South Carolina	1	Yeats NP	1
Monroe Co	1	Ontario	1	South Korea	1	York, PA	1
Monroe County	1	Orange County	1	South Korea	1	Youngstown	1
Montana	1	Orlando, FL	1	South Towns	1		
Montauk NY	1	Panama City	1	S. Rhode Island	1		
Mosquito Lake	1	Peebles Island	1	Southold	1		
Nags Head	1	PEI Canada	1	Spring Water	1		
Nantucket	1	Pelham	1	Springfield	1		
Nassau	1	Philadelphia	1	St Lawrence	1		
Nescapeak Park	1	Pine Lake	1	St. Catherine's	1		
New Hampton	1	Poconos PA	1	Staten Island	1		
		Port Colborne	1	Susquehanna	1		

Do you plan to travel to Niagara County, NY for fishing / fishing related activities in the future? n=1,046



The responses to these two questions reveal:

1. The angler coming to Niagara County goes to other fishing destinations and there are MANY, lots of competition out there.
2. The vast majority, nearly ALL, indicated desire to return to Niagara County. High satisfaction with the total experience drives this high intent to return.



Charter Fishing Captains

Young Strategies also surveyed Charter Fishing Captains in Niagara County, NY. There were 26 Charter Fishing Captains that responded to our survey.

- ❖ One third of the fishing charter captains that responded reported being a resident of Niagara County, NY.
- ❖ Over half (56%) reported they offer charter fishing year-round.
- ❖ Almost two thirds (63%) of charter captains reported conducting sportfishing charters in Niagara County, NY for more than 10 years and 90% reported they have been conducting Sportfishing Charters for 5+ years.
- ❖ 77% of charter fishing captains reported conducting Sportfishing Charters full-time.
- ❖ Most reported their charter fishing clients stayed in Niagara County, NY for two nights (48%) or one night (24%).
 - ❖ Of these, 74% reported their clients typically stay in a hotel/motel.
- ❖ Charter fishing captains reported a typical travel party size of three (48%) or four (33%) anglers.
- ❖ Primary destination of clients reported by the charter fishing captains was Lewiston (44%) followed by Wilson (30%).
- ❖ Majority (81%) of charter captains reported the most fished waterway was the Lake Region (trout, salmon) followed by the River Region (salmon, trout, bass, muskie, walleye, etc.).
- ❖ Other than fishing, charter captains reported their clients also participated in sightseeing at the Falls (92%), visiting wineries/breweries (69%), camping (42%) and golf (42%).

Are there any additional sales or marketing efforts you would like to see Destination Niagara USA implement to promote charter fishing? (Ex. where to advertise, shows to attend, etc.) n=7

- Facebook/social media ads, Billboards in Niagara Falls
- I think word needs to be spread to the saltwater groups and west coast salmon groups about how good Lake Ontario is
- No
- No. We already get enough visitors.
- Nothing particular
- Promote more in state of PA. Promote variety of species in Lake Ontario to catch.





2022 Economic Impacts of Fishing in Niagara County, NY

YSI estimates fishing generated \$58.55M in 2022 visitor spending in Niagara County, NY (6% of total 2022 visitor spending).

2022 Charter Fishing Economic Impact Calculation

44 charters on website, 29 year-round, 15 seasonal,
31 Charter Captains responded to YSI survey

15 Seasonal Charter Services – 7 months Apr – Oct 28 weeks

- Fri – Sun = 84 days out of 210 days available or 420 half days
- Estimate 140 days booked with 3.9 ppl = 546 ppl per boat
- Estimate 175 bookings X \$2,315 = \$405,125 total visitor spending per boat
- 2,625 total charters booked among 15 seasonal captains

15 seasonal charters generate \$6,076,875 in total visitor spending

29 Year-Round Charter Services – 12 months 365 days

- Estimate 208 days booked X 3.9 = 811 ppl per boat
- 240 bookings X \$2315 = \$555,600
- 6,960 total charters booked among 29 year-round captains

29 year-round charters generate \$16,112,400 in total visitor spending

2022 Charter fishing 9,900 fishing parties generated \$22,189,275 in total visitor spending (2.3% of \$969M overall visitor spending)

Niagara County Fishing Survey Data Summary

Survey Data n= 1,165	Charter Fishing	Independent Fishing
Average spend per travel party	\$2,314.67	\$1,897.25
Length of stay	3.0 nights	2.9 nights
Fishing party size	3.9 people	4.1 people

2022 Independent Fishing Economic Impact Calculation

- 766 independent anglers responded to the fishing survey
- Fishing Survey - 82% of anglers reported their group went out on their own, 18% reported chartering a fishing trip with an experienced captain.
- YSI conservatively estimates there are twice as many independent fishing parties (19,170) as compared to charter fishing parties (9,585).
- 19,170 independent fishing parties X \$1,897 average spending per party = \$37,560,600

2022 Independent fishing generated \$36,365,490 in total visitor spending (3.7% of \$969M overall visitor spending)

Economic Impact Miscellaneous Background Data

2022 Total Visitor Spending – Niagara County, NY (Tourism Economics)

- 2022 Traveler Spend, Niagara = \$969m
- Tourism generated labor income: direct \$301.4m, total \$471.4m
- Niagara County was the most dependent on tourism wage income among all counties in the Niagara region as 13.7% of all labor income in the county is generated by visitors
- 2022 State taxes: \$44,185,000
- 2022 Local taxes: \$54,816,000

Niagara County Lodging

2017 Niagara County lodging guest segmentation = 58% leisure (YSI survey of Niagara County lodging)

2022 STR data – demand 612,141 (+7%) = 355,041 leisure demand estimate

Total 2022 STR Reported Lodging Revenue = \$86.5M

Sporting/Fishing License Sales

- 2021/22 Sporting License Sales By County (NYS Dept. of Environmental Conservation website)
- Niagara – 52,779 licenses, \$812,375
- Erie – 144,775 licenses, \$2,254,340
- 2021/22 Statewide non-resident 7-day fishing licenses 65,031, \$1,820,868

Fishing Survey

- Fishing parties report 3-night typical stay, longer than typical leisure travelers to Niagara County, the majority of overnight fishing parties stay in paid overnight accommodations