COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

NIAGARA FALLS® USA

WHERE ADVENTURE COMES NATURALLY®

2023

Size of the Niagara Falls Travel Market

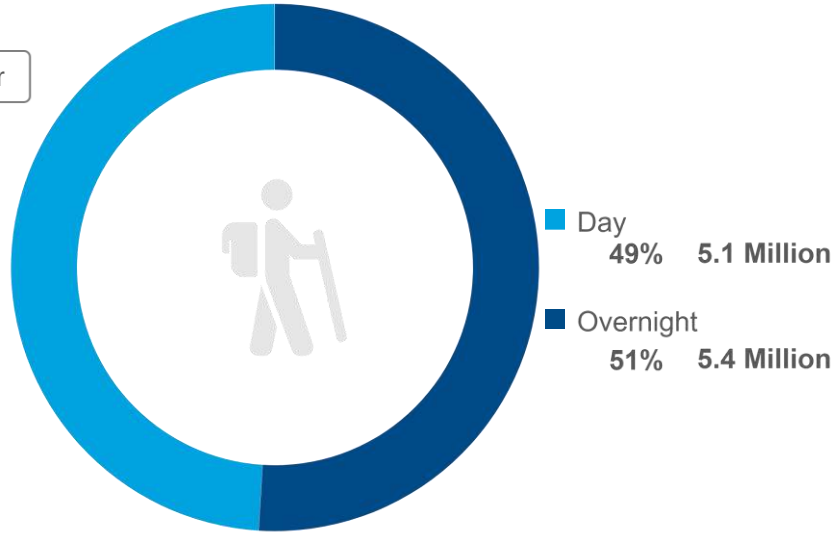
Base: 2023 Person-Trips

Total Size of Niagara Falls 2023 Domestic Travel Market

Total Person-Trips

10.6 Million

+3.1% vs. last year

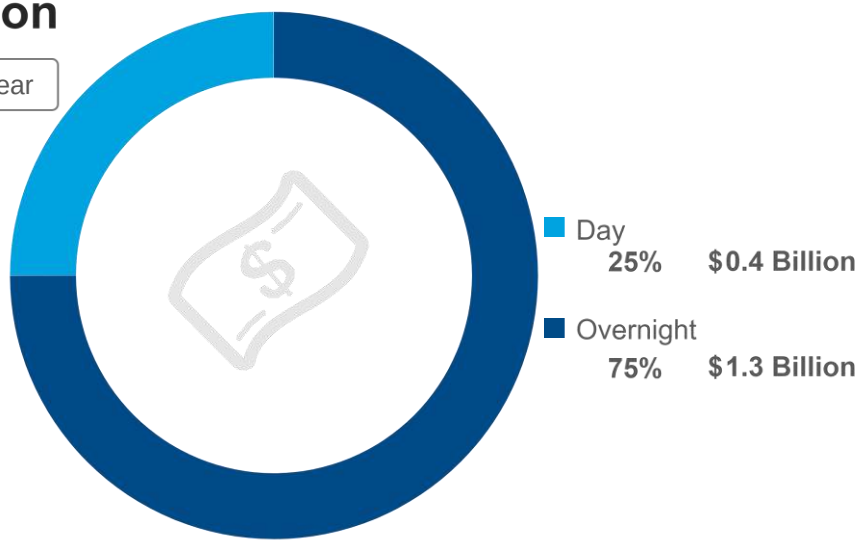


Total Expenditures for Niagara Falls 2023 Domestic Travel Market

Total Spending

$ 1.7 Billion

+6.9% vs. last year



COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Overnight Visitation

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2023

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 or more nights away from home.
- This report provides an overview for Niagara Falls's domestic tourism business in 2023.

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 2023:

Overnight Base Size

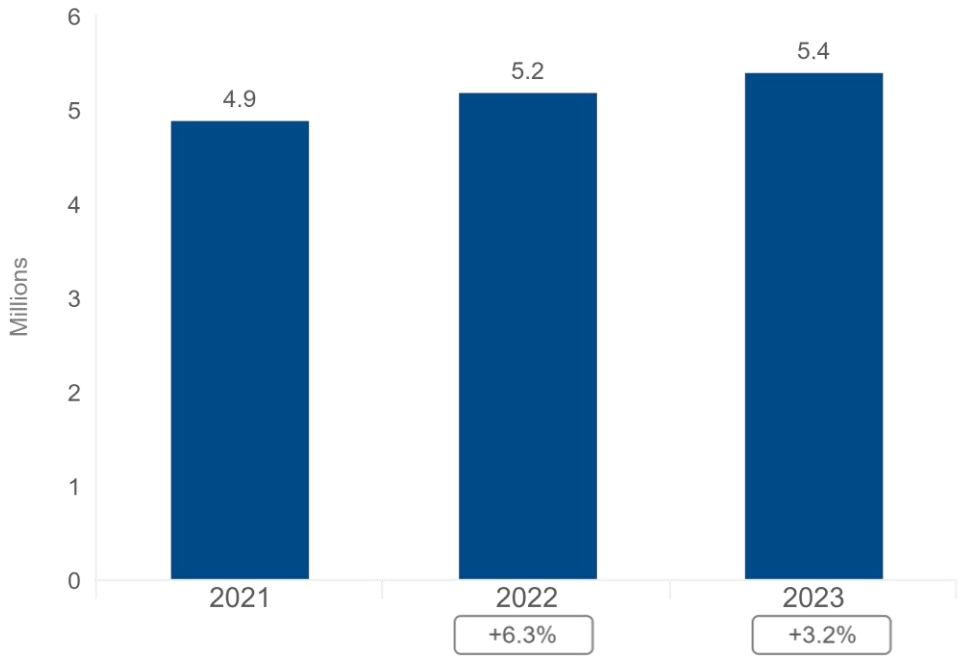
354

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: 2023 Overnight Person-Trips

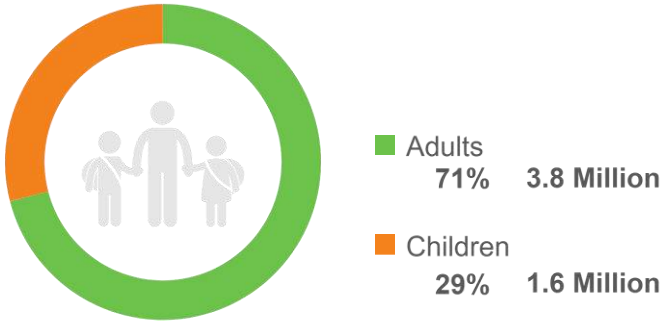
Overnight Trips to Niagara Falls



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

Total Overnight Person-Trips

5.4 Million



Past Visitation to Niagara Falls

67% of overnight travelers to Niagara Falls are repeat visitors

43% of overnight travelers to Niagara Falls had visited before in the past 12 months

Niagara Falls's Overnight Trip Expenditures

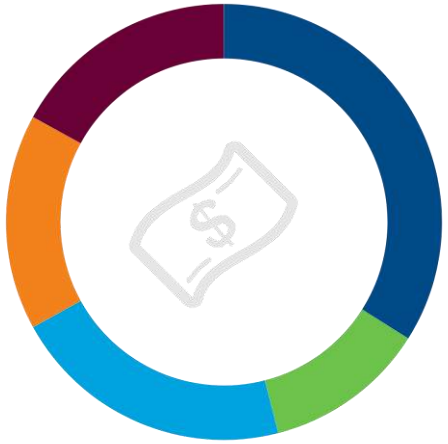
Base: 2023 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

$ 1.299 Billion

+6.6% vs. last year

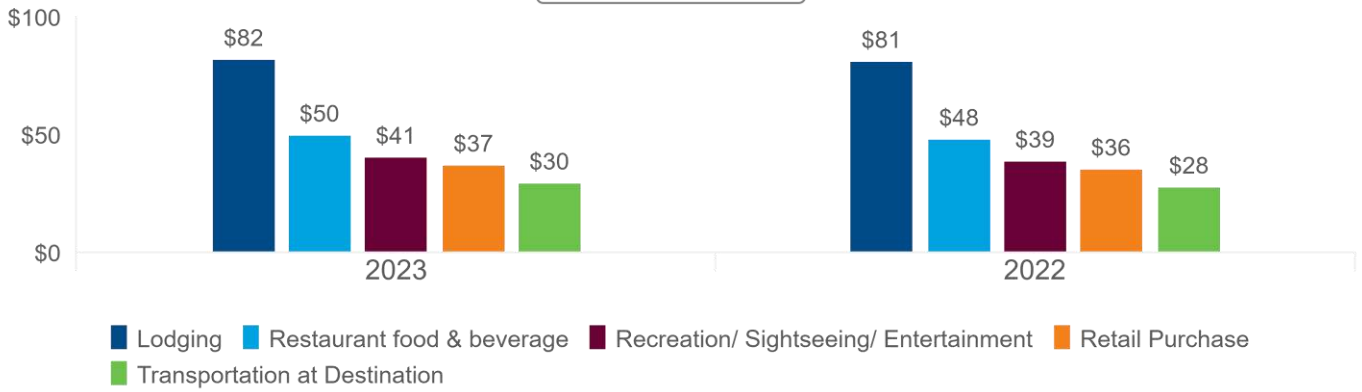


			vs. last year
Lodging	34%	$444 Million	+4.9%
Transportation at Destination	12%	$162 Million	+9.3%
Restaurant Food & Beverage	21%	$269 Million	+7.1%
Retail Purchase	16%	$203 Million	+6.0%
Recreation/Entertainment	17%	$222 Million	+8.3%

Average Per Person Per Trip Expenditures on Domestic Overnight Trips - by Sector

Average Per Person Per Trip: $240

Last year: $232



Average Per Person Per Trip:

Leisure $237

Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

Main Purpose of Trip

32%
Visiting friends/ relatives

21%
Touring

13%
Special event

10%
City trip

4%
Outdoors

3%
Casino

3%
Theme park

1%
Cruise

3%
Conference/ Convention

3%
Other business trip

3%
Business-Leisure

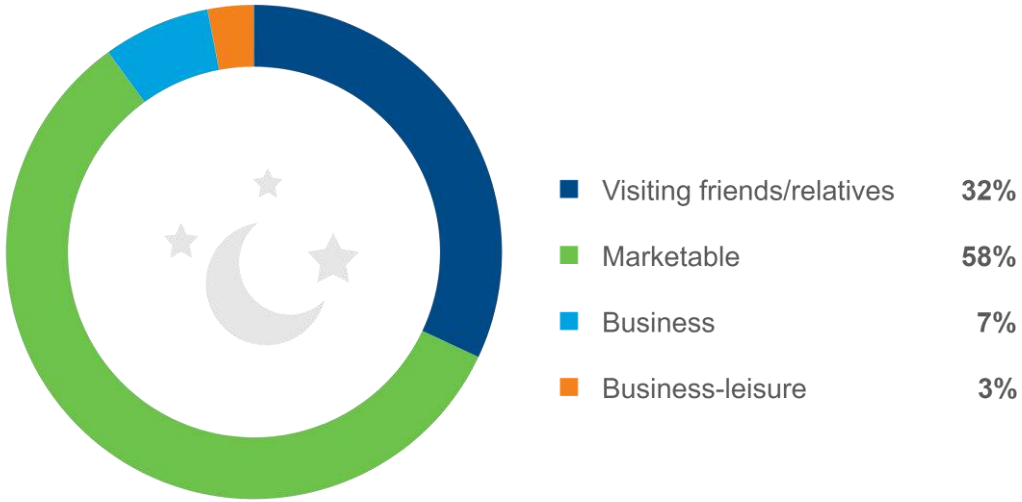
Main Purpose of Leisure Trip

	2023	2022
Visiting friends/ relatives	32%	37%
Touring	21%	20%
Special event	13%	6%
City trip	10%	12%
Outdoors	4%	5%
Casino	3%	5%
Theme park	3%	4%
Cruise	1%	<1%

Structure of the Niagara Falls Overnight Travel Market

Base: 2023 Overnight Person-Trips

2023 Niagara Falls Overnight Trips

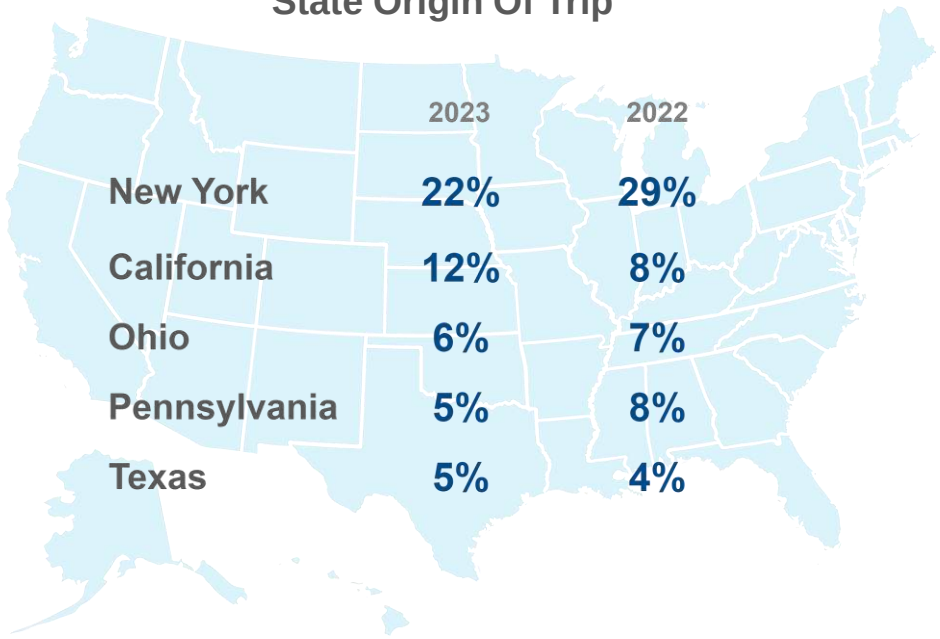


Last Year's Niagara Falls Overnight Trips

Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

State Origin Of Trip



	2023	2022
New York	22%	29%
California	12%	8%
Ohio	6%	7%
Pennsylvania	5%	8%
Texas	5%	4%

Season of Trip

Total Overnight Person-Trips

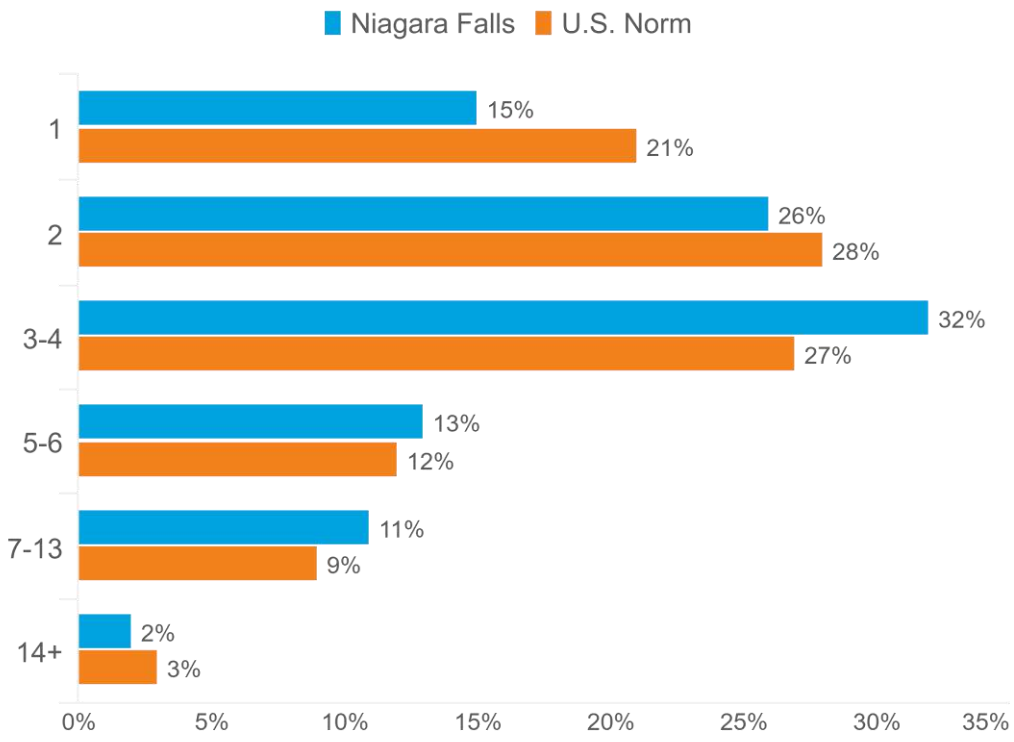
DMA Origin Of Trip

	2023	2022
Los Angeles, CA	11%	5%
New York, NY	11%	17%
Buffalo, NY	4%	6%
Chicago, IL	4%	3%
Pittsburgh, PA	3%	2%
Washington, DC	3%	2%
Ft. Wayne, IN	3%	<1%
Rochester, NY	3%	4%
Raleigh-Durham, NC	3%	1%
Dallas-Ft. Worth, TX	3%	2%

Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

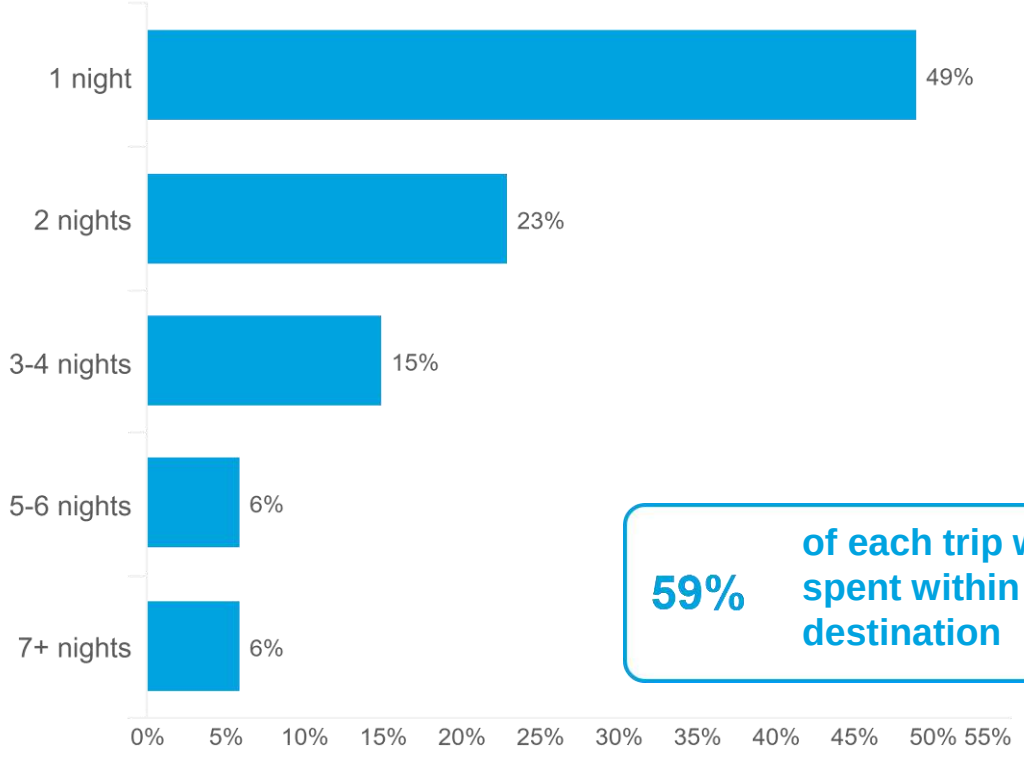
Total Nights Away on Trip



Niagara Falls
3.9
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Niagara Falls



59% **of each trip was spent within the destination**

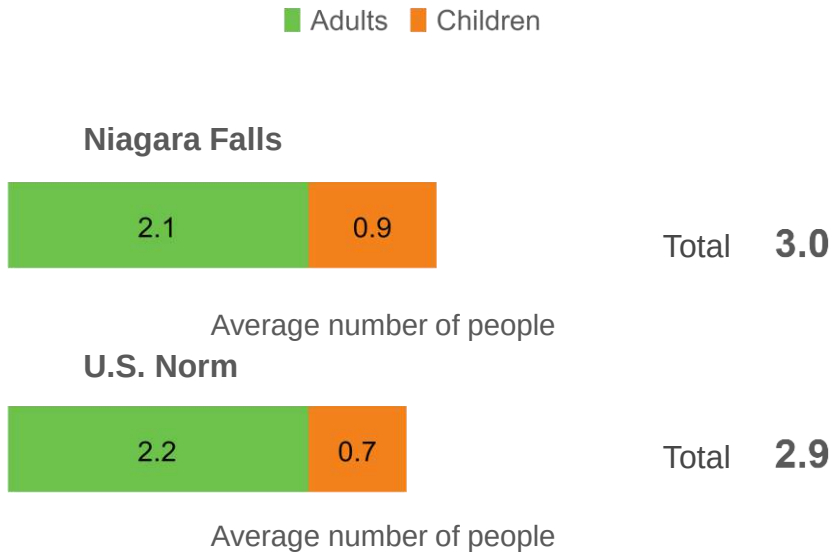
Average number of nights
2.3

Average last year
2.3

Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

Size of Travel Party

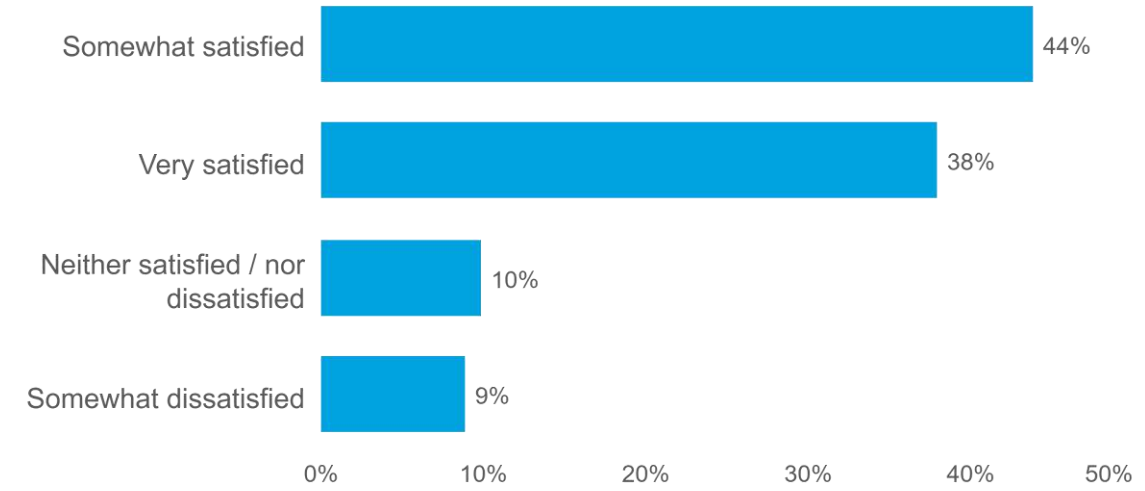


22% **of travel parties had a travel party member that required accessibility services**

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



Niagara Falls's Overnight Trip Characteristics

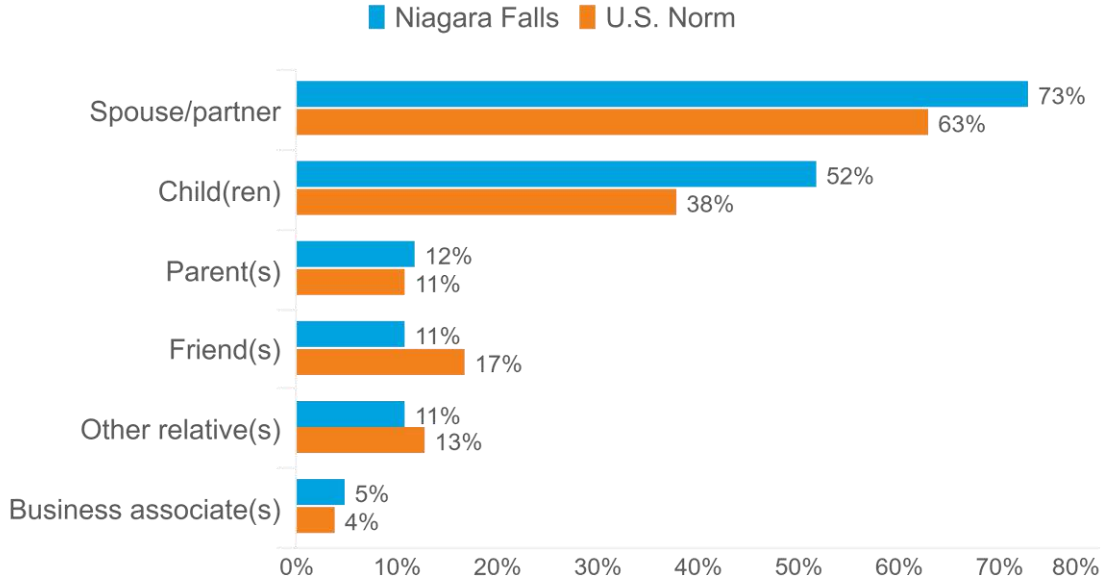
Base: 2023 Overnight Person-Trips

17% **of trips only had one person in the travel party**

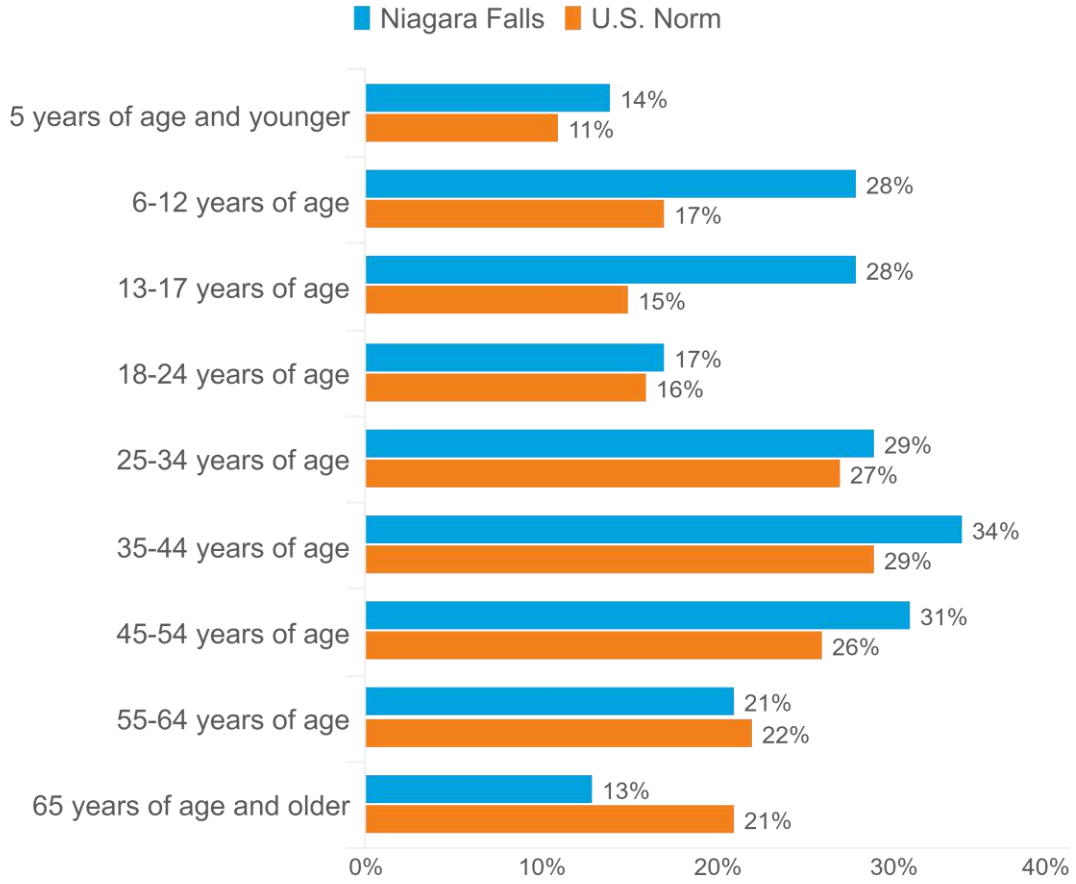
U.S. Norm: 24%

Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



Travel Party Age



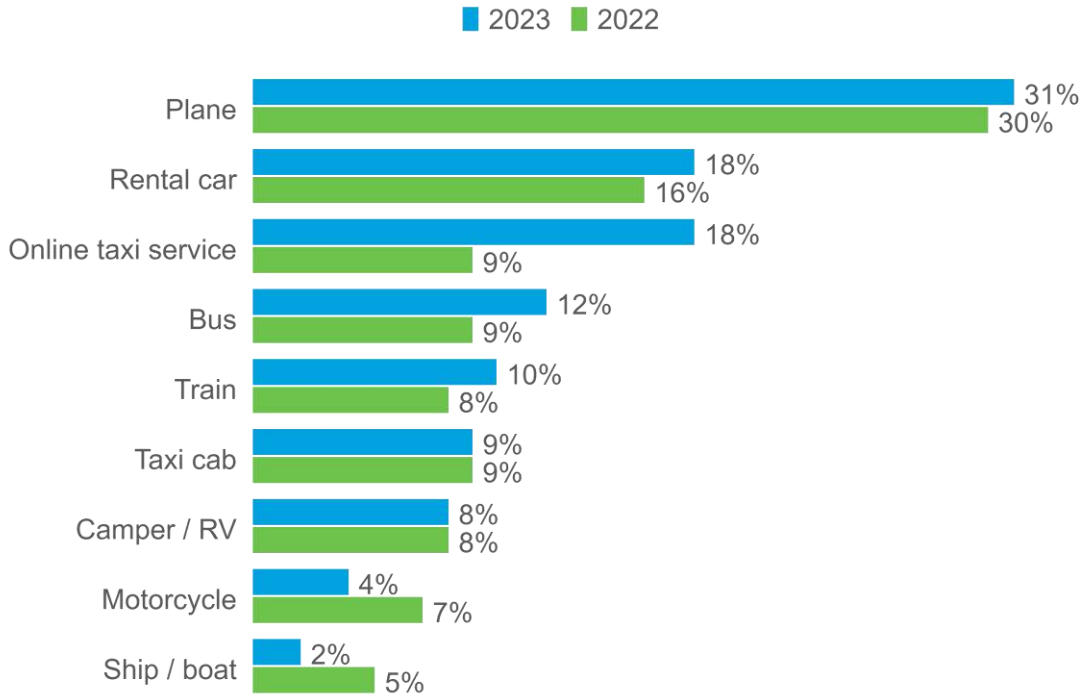
Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

Transportation Used to get to Destination

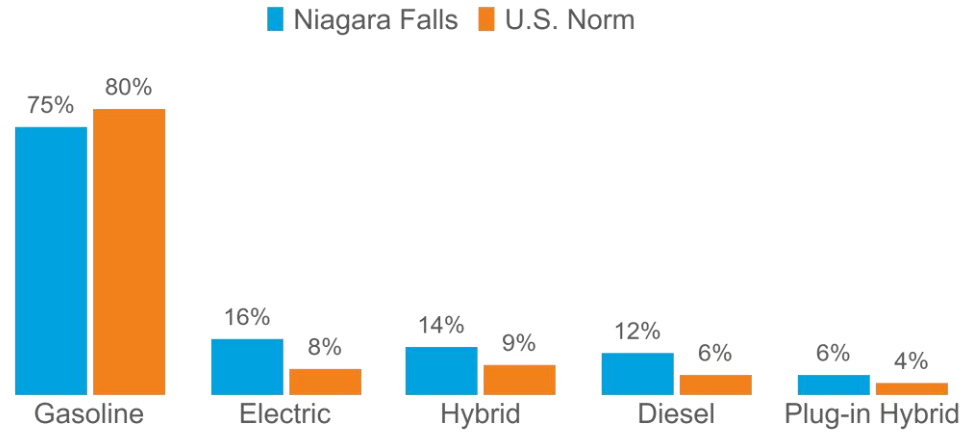
62% **of overnight travelers use own car/truck to get to their destination**

Previous year: 67%

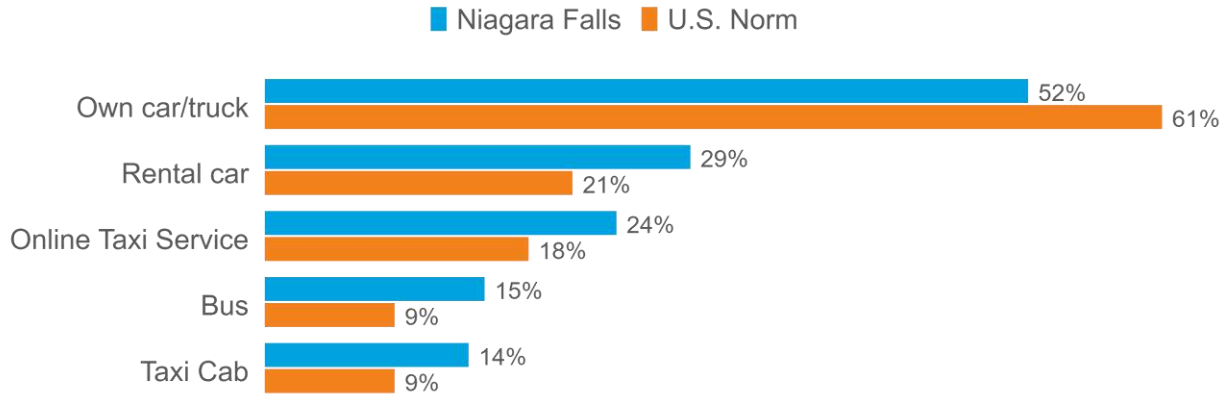


Question updated in 2020

Type of Vehicle Used to get to Destination



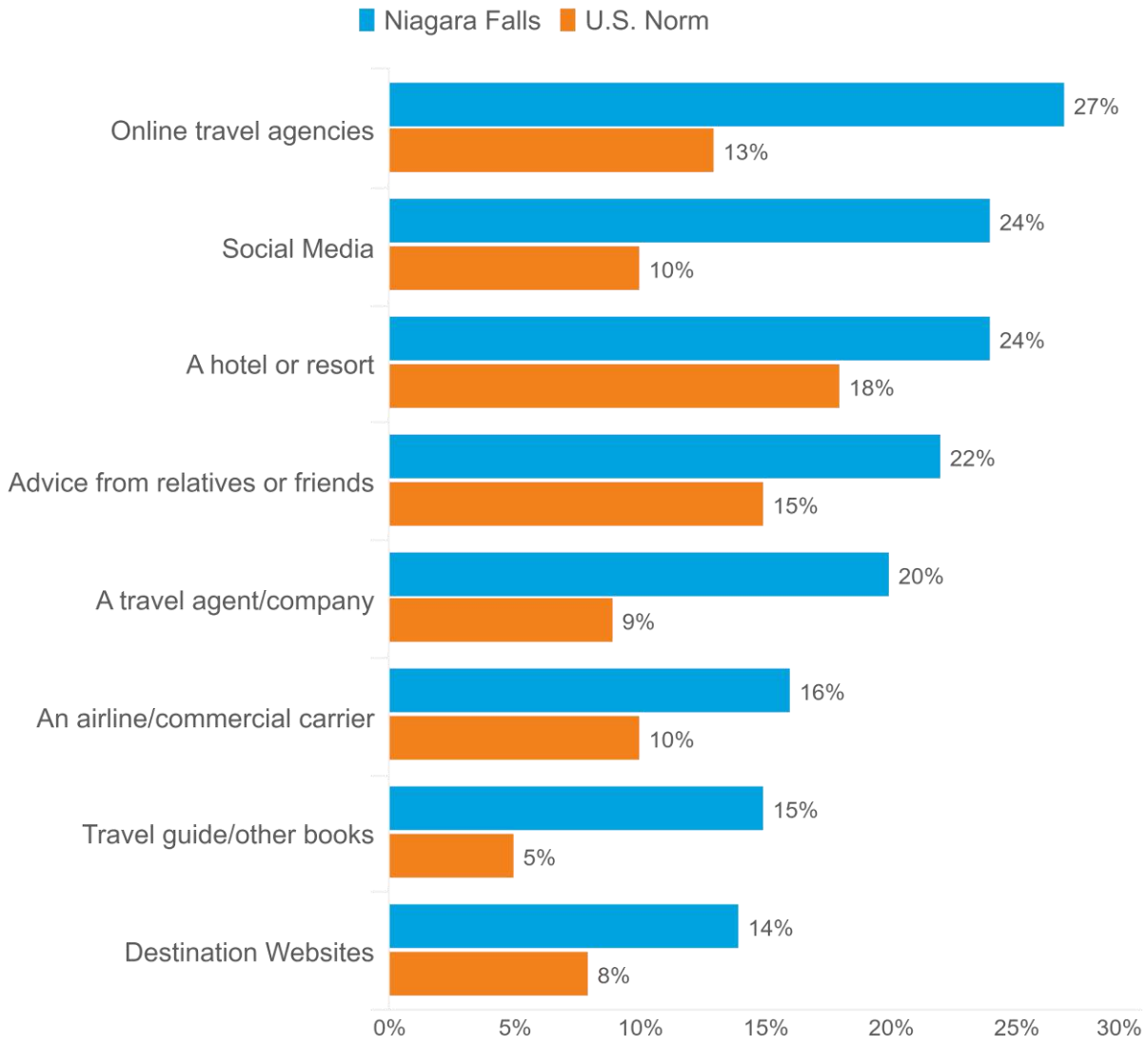
Transportation Used within Destination



Niagara Falls: Pre-Trip

Base: 2023 Overnight Person-Trips

Trip Planning Information Sources



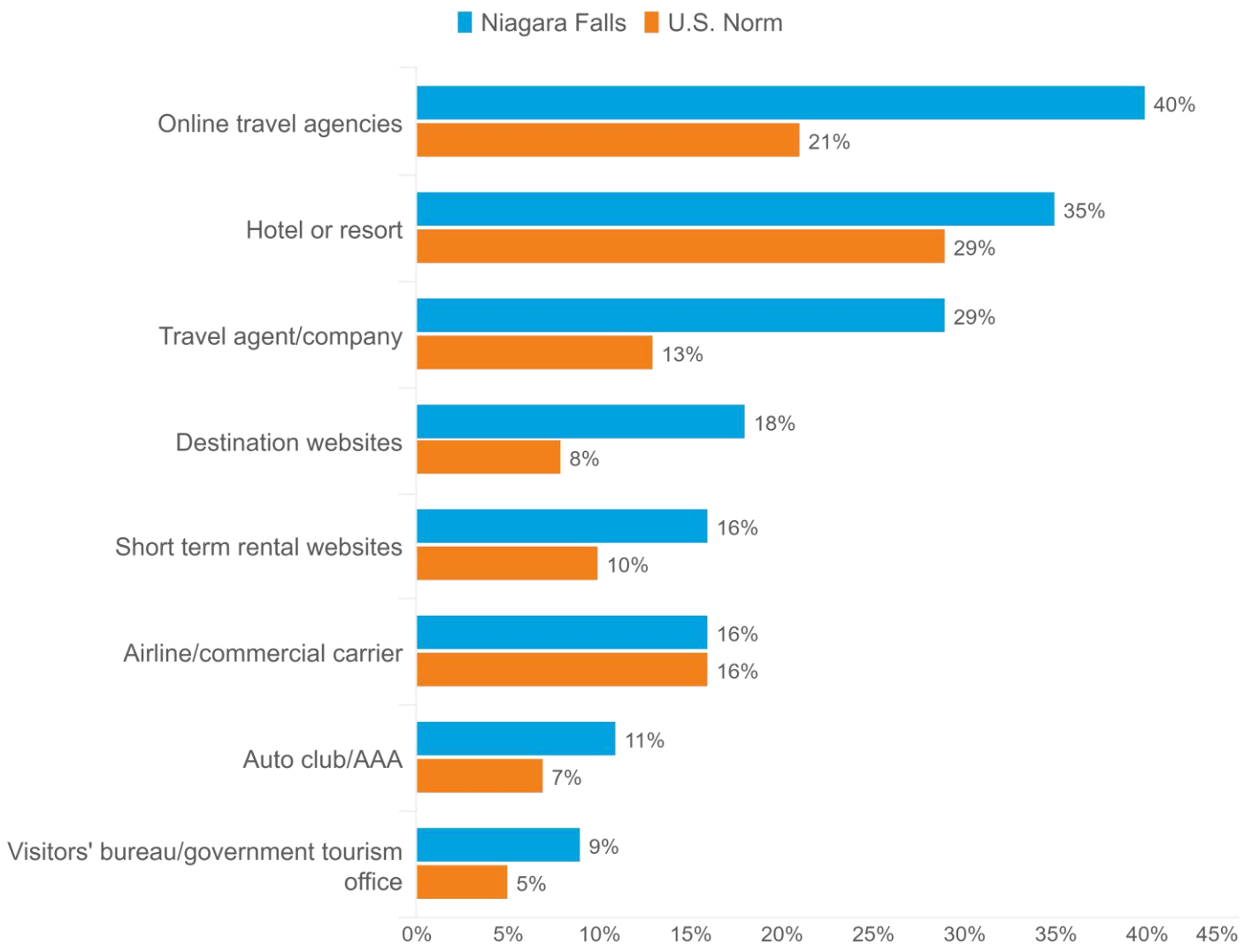
Length of Trip Planning

	Niagara Falls	U.S. Norm
1 month or less	**33%**	**33%**
2 months	**21%**	**17%**
3-5 months	**23%**	**18%**
6-12 months	**13%**	**13%**
More than 1 year in advance	**4%**	**4%**
Did not plan anything in advance	**5%**	**15%**

Niagara Falls's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

Method of Booking



Accommodations

	2023	2022
Hotel	**61%**	**62%**
Home of friends / relatives	**18%**	**21%**
Resort hotel	**14%**	**11%**
Motel	**12%**	**14%**
Bed & breakfast	**10%**	**14%**
Rented cottage / cabin	**10%**	**5%**
Rented home / condo / apartment	**8%**	**9%**

Niagara Falls: During Trip

Base: 2023 Overnight Person-Trips

Activity Groupings

Outdoor Activities

67%

U.S. Norm: 47%

Entertainment Activities

75%

U.S. Norm: 54%

Cultural Activities

55%

U.S. Norm: 28%

Sporting Activities

38%

U.S. Norm: 20%

Business Activities

27%

U.S. Norm: 15%

Activities and Experiences (Top 10)

	2023	2022
Shopping	37%	37%
Sightseeing	35%	37%
Landmark/historic site	31%	30%
National/state park	25%	23%
Bar/nightclub	22%	21%
Museum	21%	25%
Local parks/playgrounds	20%	16%
Attending celebration	19%	21%
Casino	19%	24%
Theme park	18%	18%

Niagara Falls: During Trip

Base: 2023 Overnight Person-Trips

Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Niagara Falls	U.S. Norm
Outlet/mall shopping	54%	44%
Shopping at locally owned businesses	52%	48%
Convenience/grocery shopping	51%	42%
Souvenir shopping	50%	38%
Big box stores (Walmart, Costco)	45%	30%
Farmers market	28%	17%
Antiquing	25%	12%

Dining Types on Trip

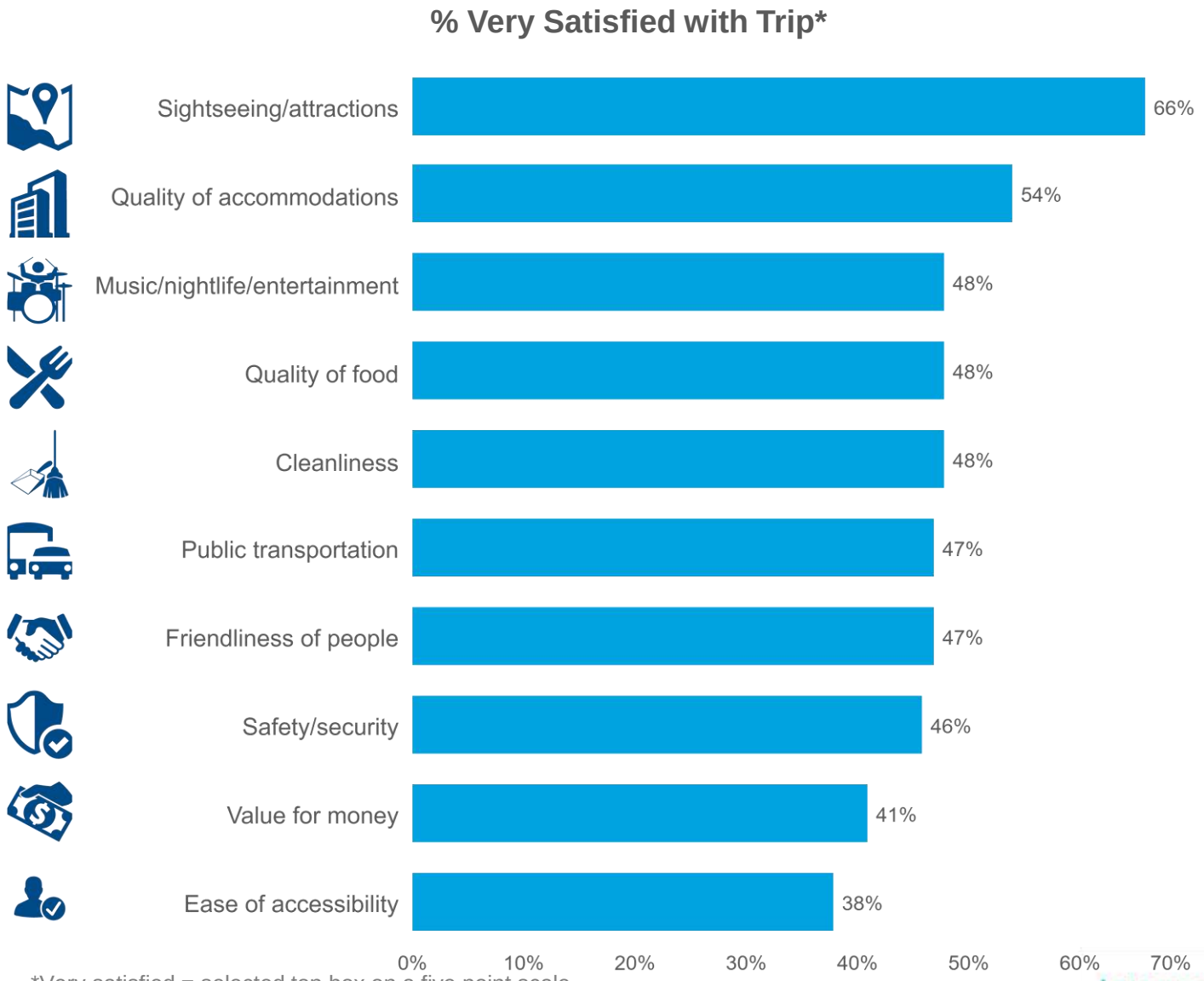
	Niagara Falls	U.S. Norm
Casual dining	66%	56%
Fast food	58%	45%
Unique/local food	43%	30%
Carry-out/food delivery service	35%	22%
Fine/upscale dining	26%	19%
Picnicking	18%	11%

Niagara Falls: During Trip

Base: 2023 Overnight Person-Trips

61%

of overnight travelers were very satisfied with their overall trip experience



*Very satisfied = selected top box on a five point scale

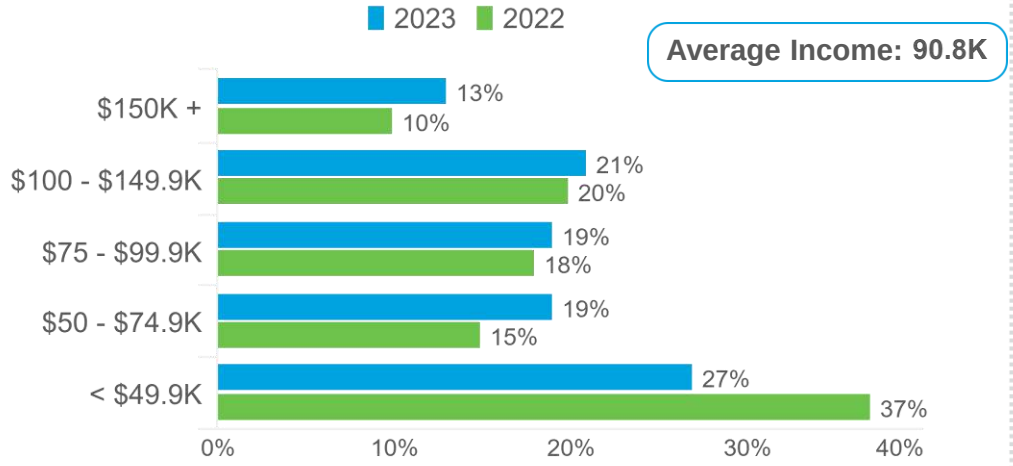
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

Question updated in 2020

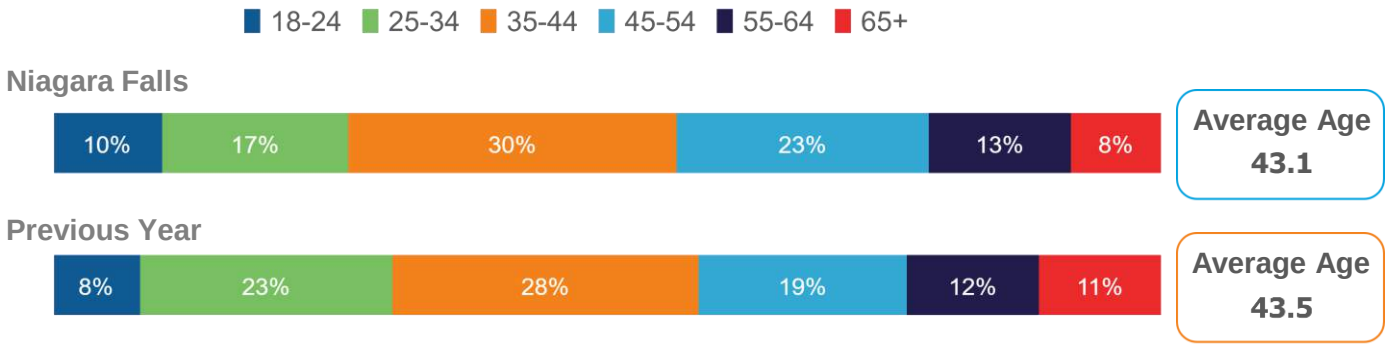
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2023 Overnight Person-Trips

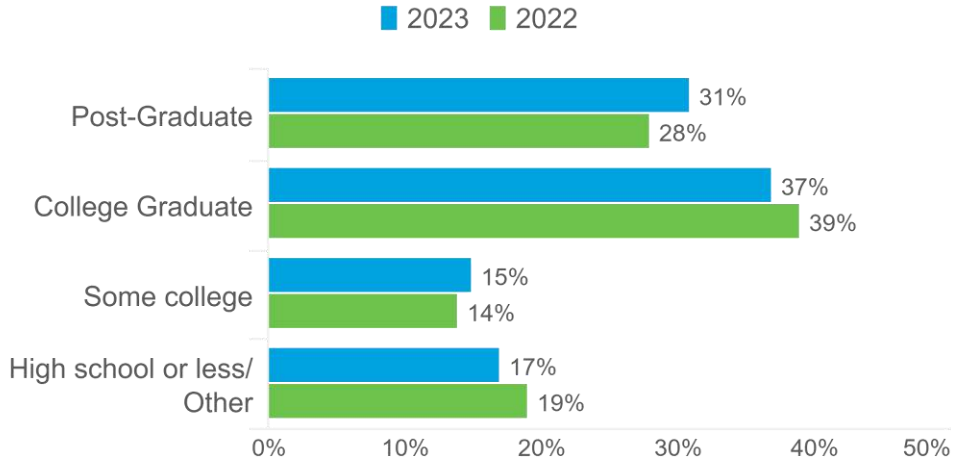
Household Income



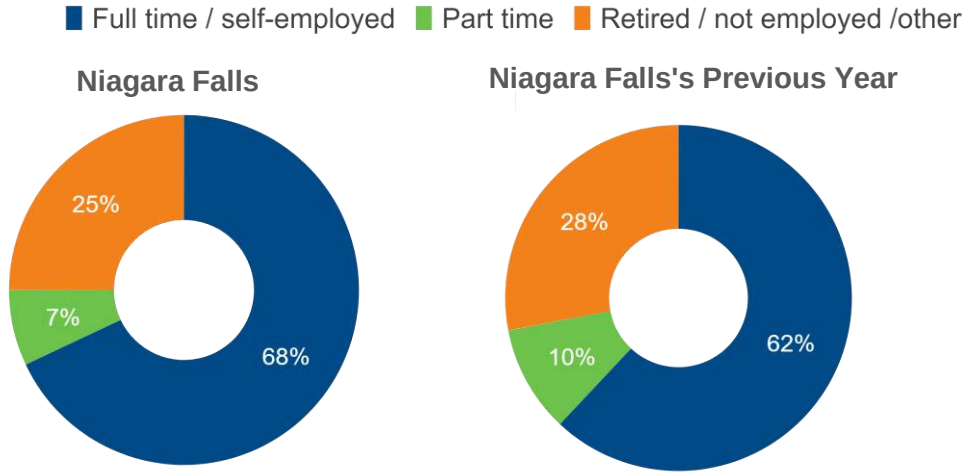
Age



Educational Attainment



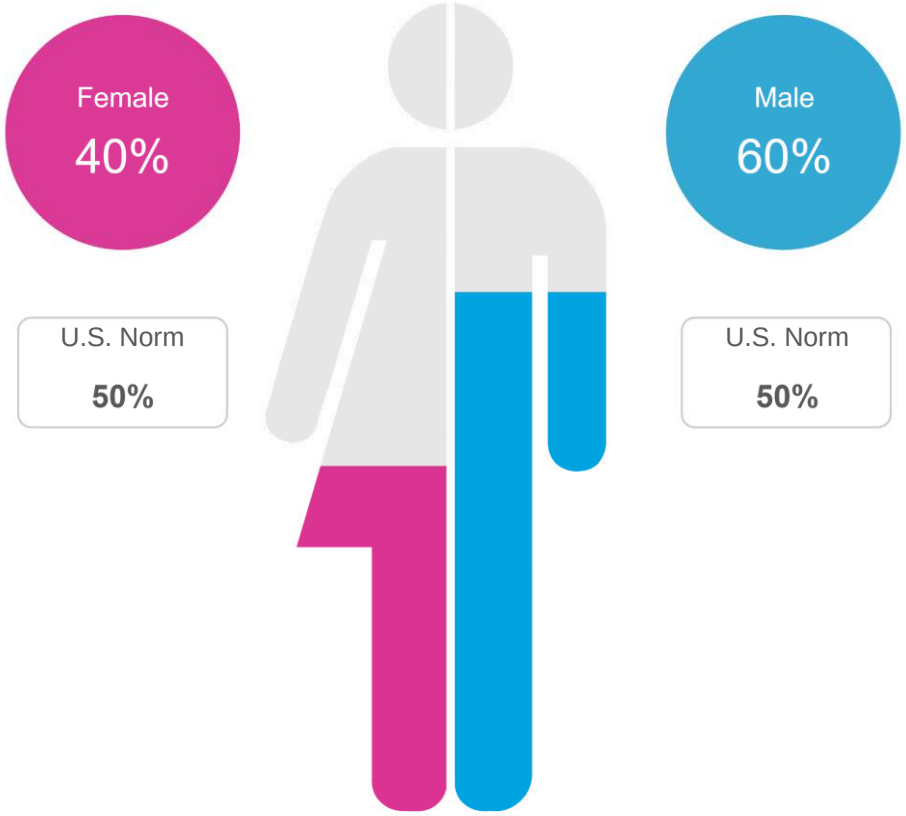
Employment



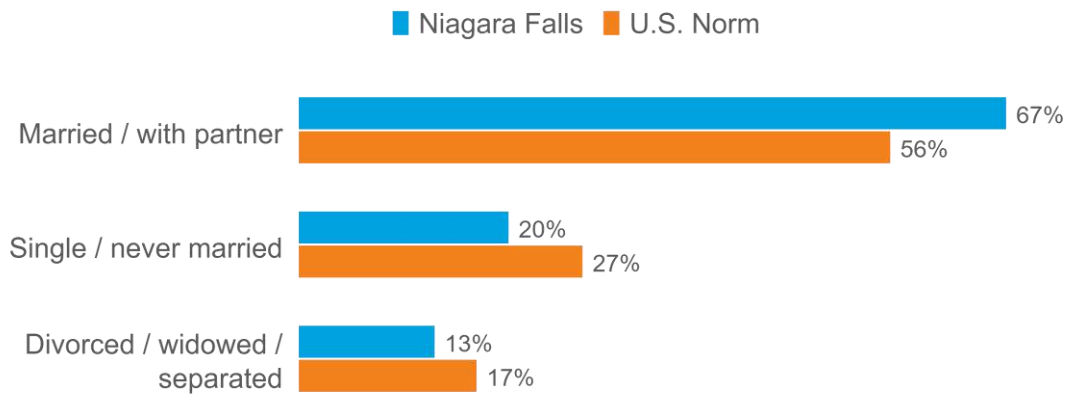
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2023 Overnight Person-Trips

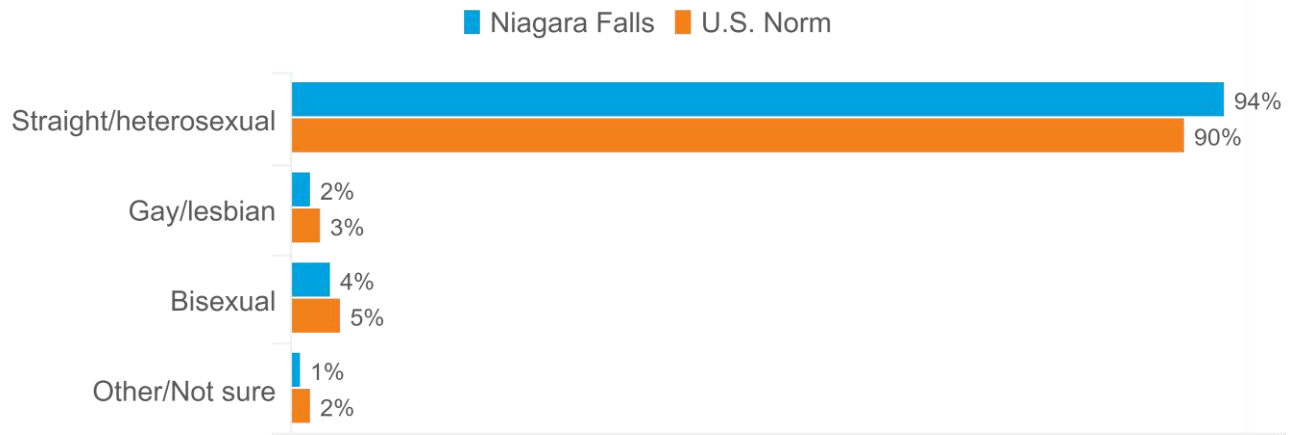
Gender



Marital Status



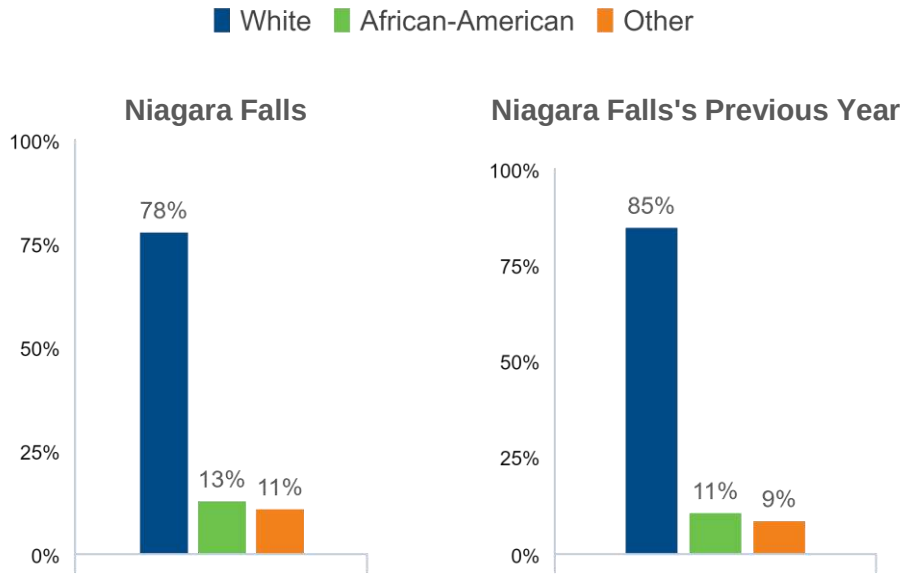
Sexual Orientation



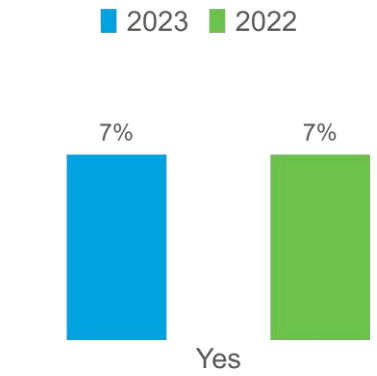
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2023 Overnight Person-Trips

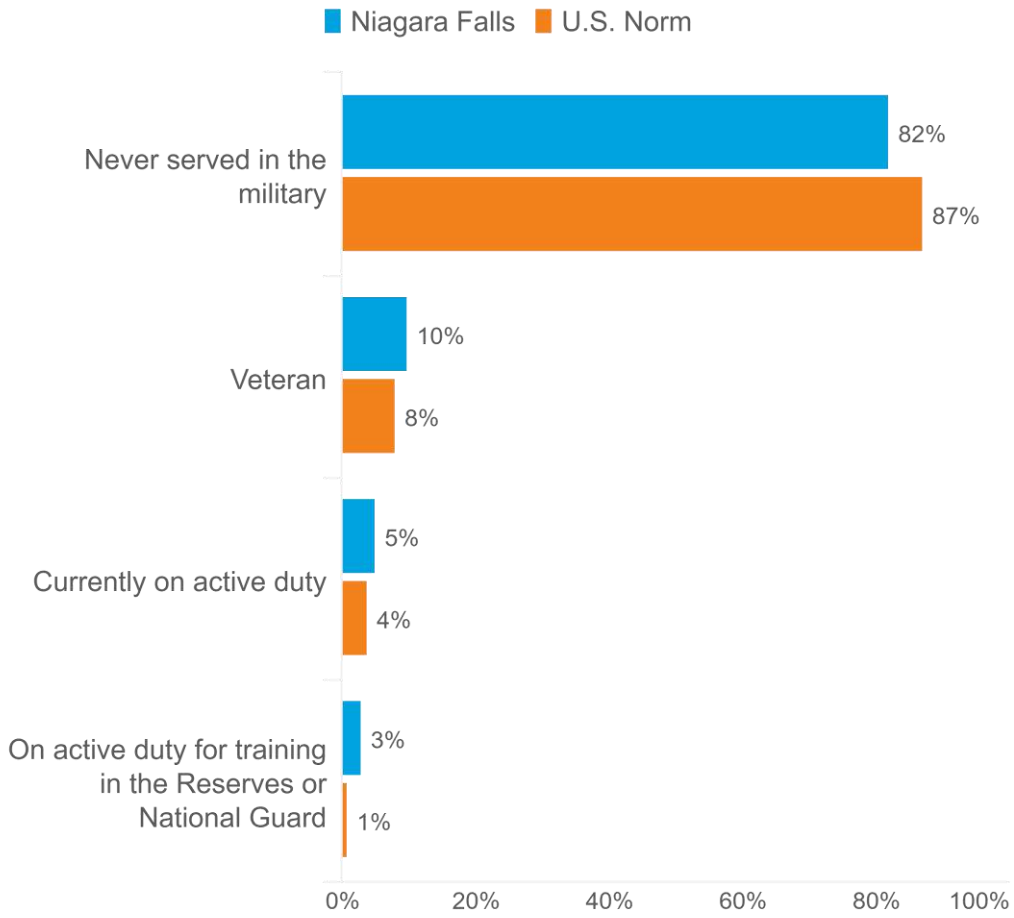
Race



Hispanic Background



Military Status



Demographic Profile of Overnight Niagara Falls Visitors

Base: 2023 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	18%	28%	16%	26%	12%
U.S. Norm	23%	33%	17%	15%	11%

Children in Household

Niagara Falls

No children under 18	42%
Any 13-17	33%
Any 6-12	34%
Any child under 6	19%

Niagara Falls's Previous Year

No children under 18	43%
Any 13-17	24%
Any 6-12	38%
Any child under 6	19%

COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Day Visitation

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2022/2023

Longwoods Travel USA®

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 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes and expenditures represent 2023 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 2022/2023:

Day Base Size

201

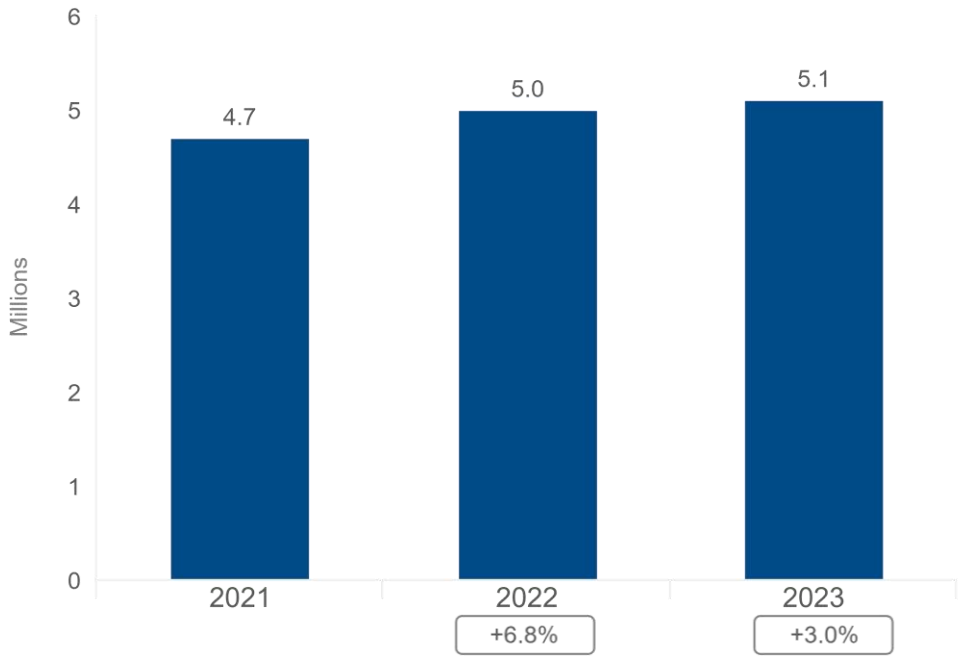
A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

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: 2023 Day Person-Trips

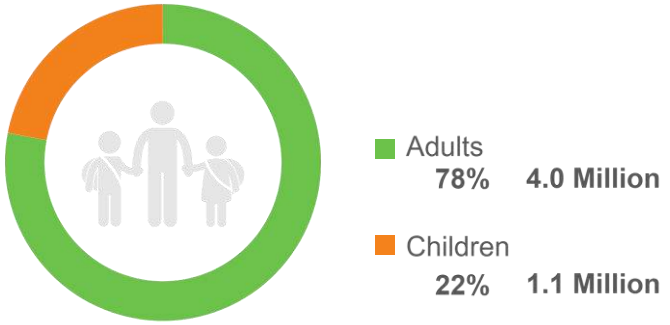
Day Trips to Niagara Falls



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

Total Day Person-Trips

5.1 Million



Niagara Falls's Day Trip Expenditures

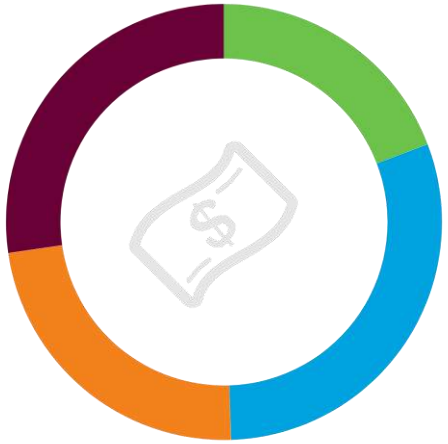
Base: 2023 Day Person-Trips

Domestic Day Expenditures - by Sector

Total Spending

$ 0.435 Billion

+7.6% vs. last year

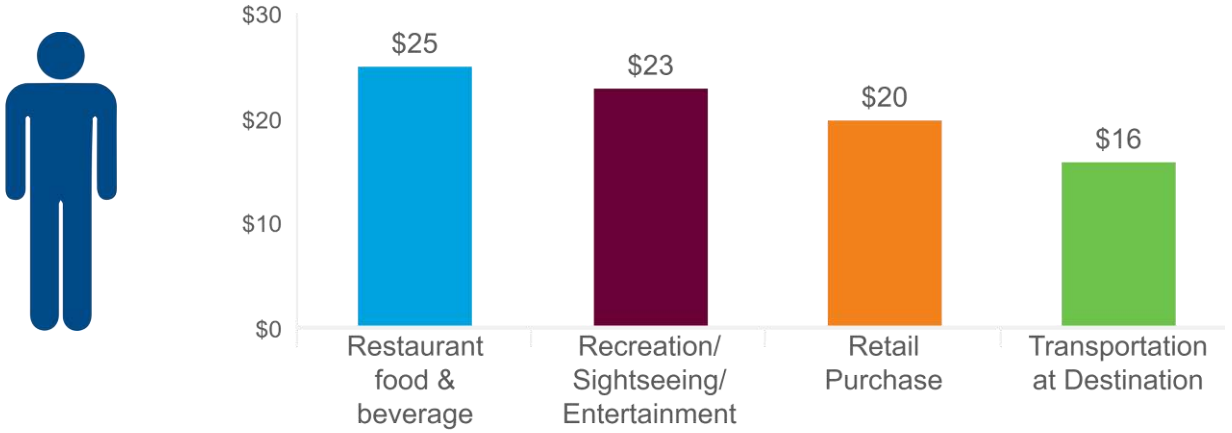


			vs. last year
Transportation at Destination	19%	$85 Million	+9.5%
Restaurant Food & Beverage	30%	$131 Million	+6.6%
Retail Purchase	23%	$102 Million	+8.3%
Recreation/Entertainment	27%	$118 Million	+6.7%

Average Per Person Per Trip Expenditures on Domestic Day Trips - by Sector

Average Per Person Per Trip: $ 85

Last year: $ 81



Niagara Falls's Day Trip Characteristics

Base: 2022/2023 Day Person-Trips

Main Purpose of Trip

26%
Visiting friends/ relatives

18%
Touring

12%
Special event

12%
City trip

9%
Casino

6%
Outdoors

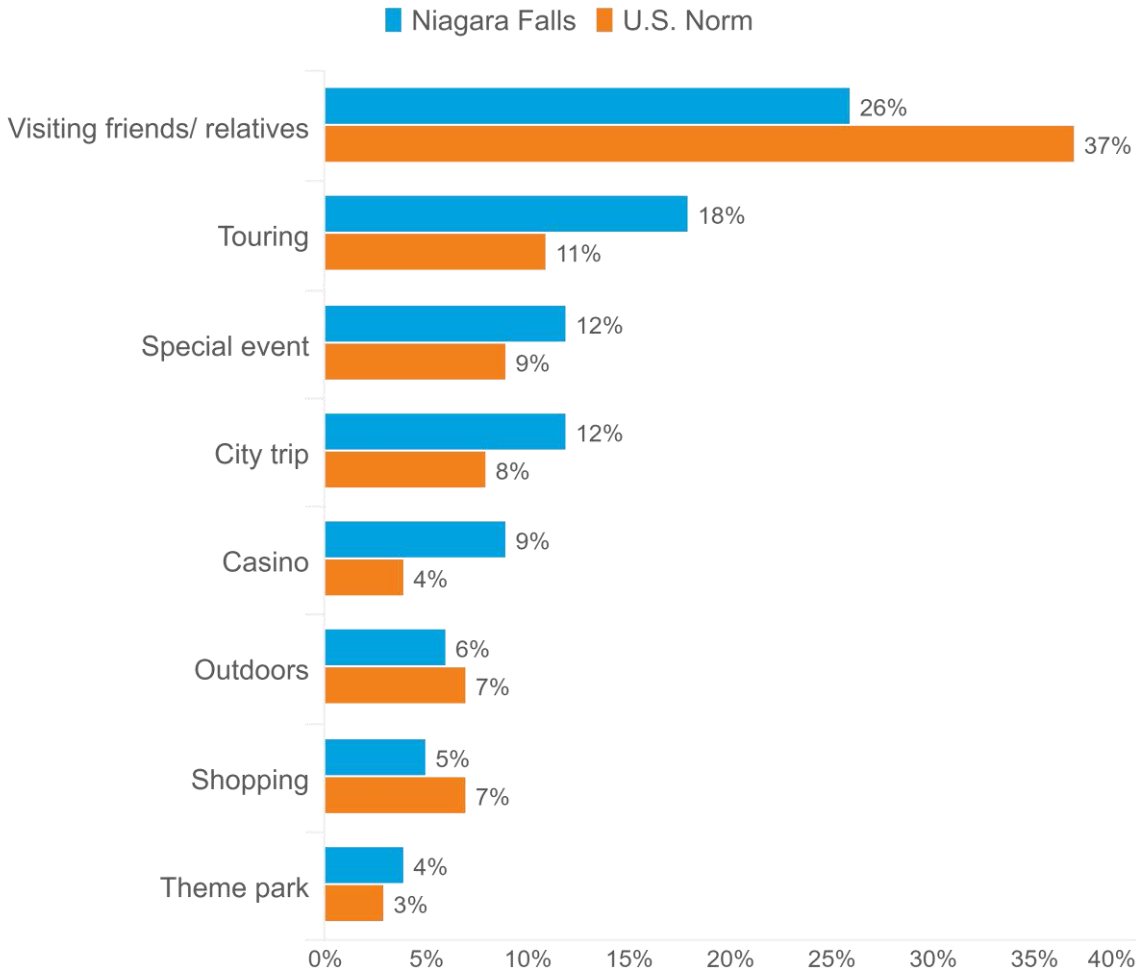
5%
Shopping

4%
Theme park

1%
Conference/ Convention

3%
Other business trip

Main Purpose of Leisure Trip



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

Base: 2022/2023 Day Person-Trips

2023 U.S. Day Trips

Visiting friends/relatives	37%
Marketable	54%
Business	6%
Business-leisure	3%

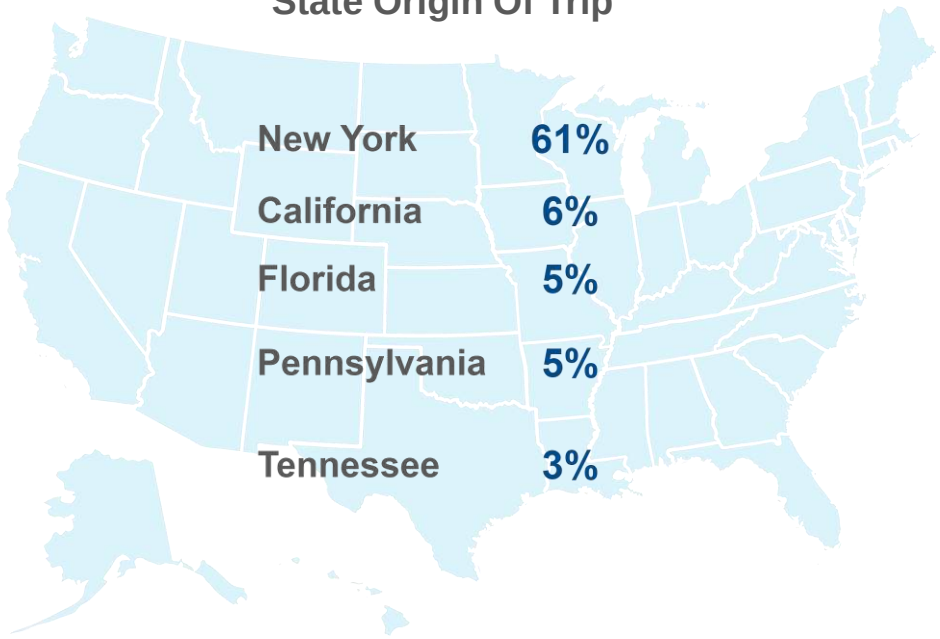
Niagara Falls Day Trips

Visiting friends/relatives	26%
Marketable	70%
Business	4%

Niagara Falls's Day Trip Characteristics

Base: 2022/2023 Day Person-Trips

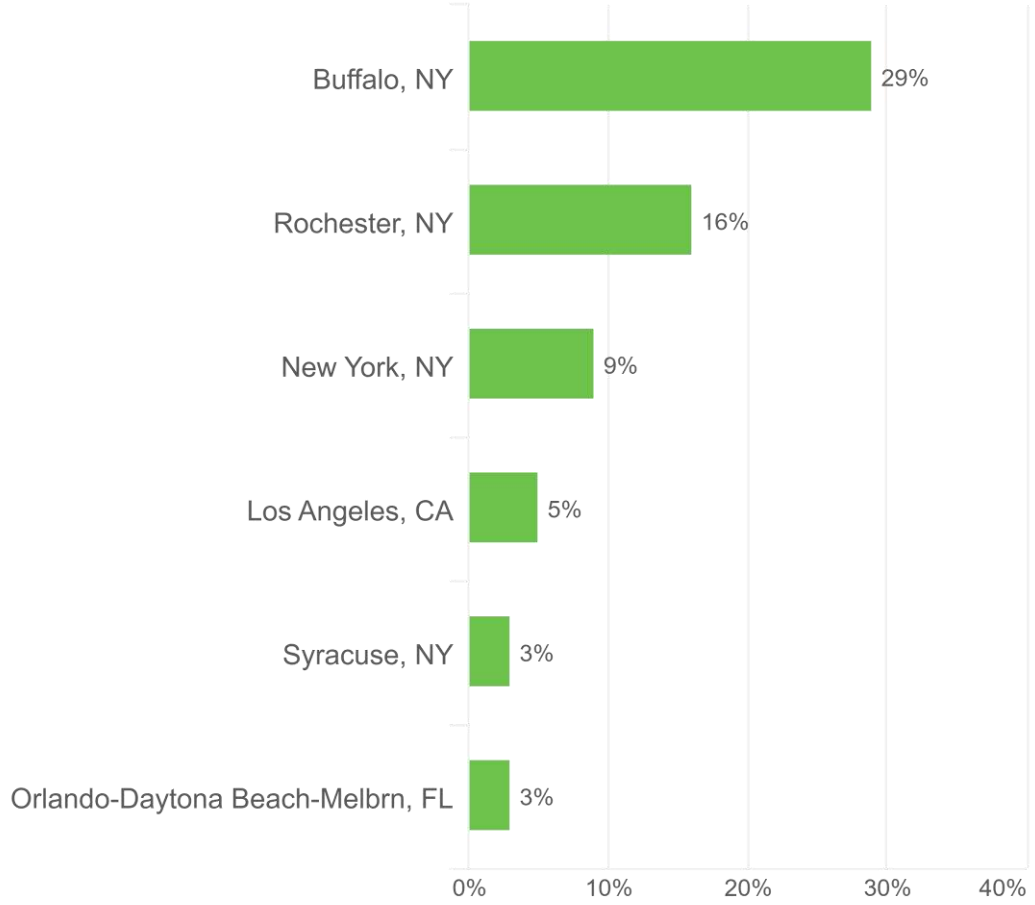
State Origin Of Trip



Season of Trip

Total 2023 Day Person-Trips

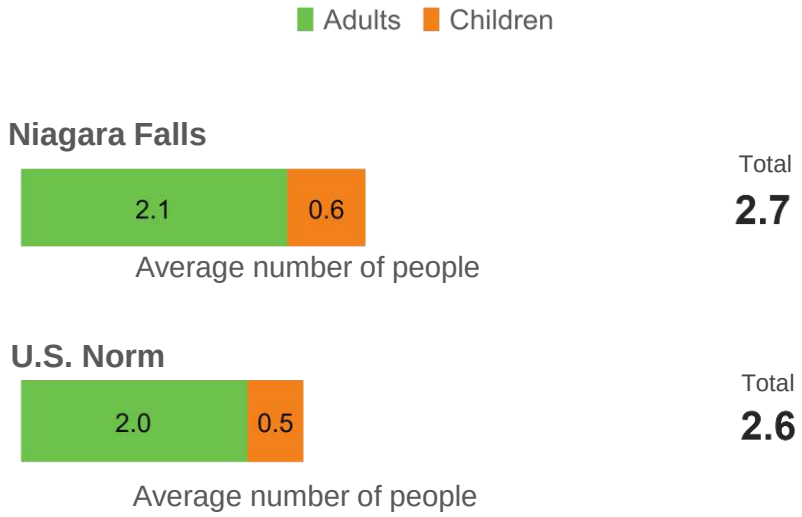
DMA Origin Of Trip



Niagara Falls's Day Trip Characteristics

Base: 2022/2023 Day Person-Trips

Size of Travel Party



21% **of travel parties had a travel party member that required accessibility services**

U.S. Norm: 15%

Niagara Falls's Day Trip Characteristics

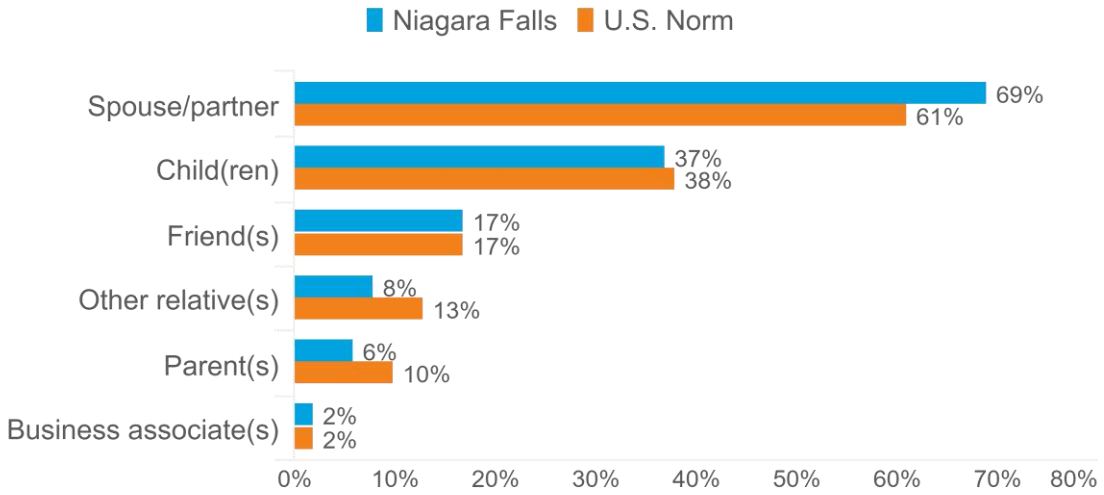
Base: 2022/2023 Day Person-Trips

12% **of trips only had one person in the travel party**

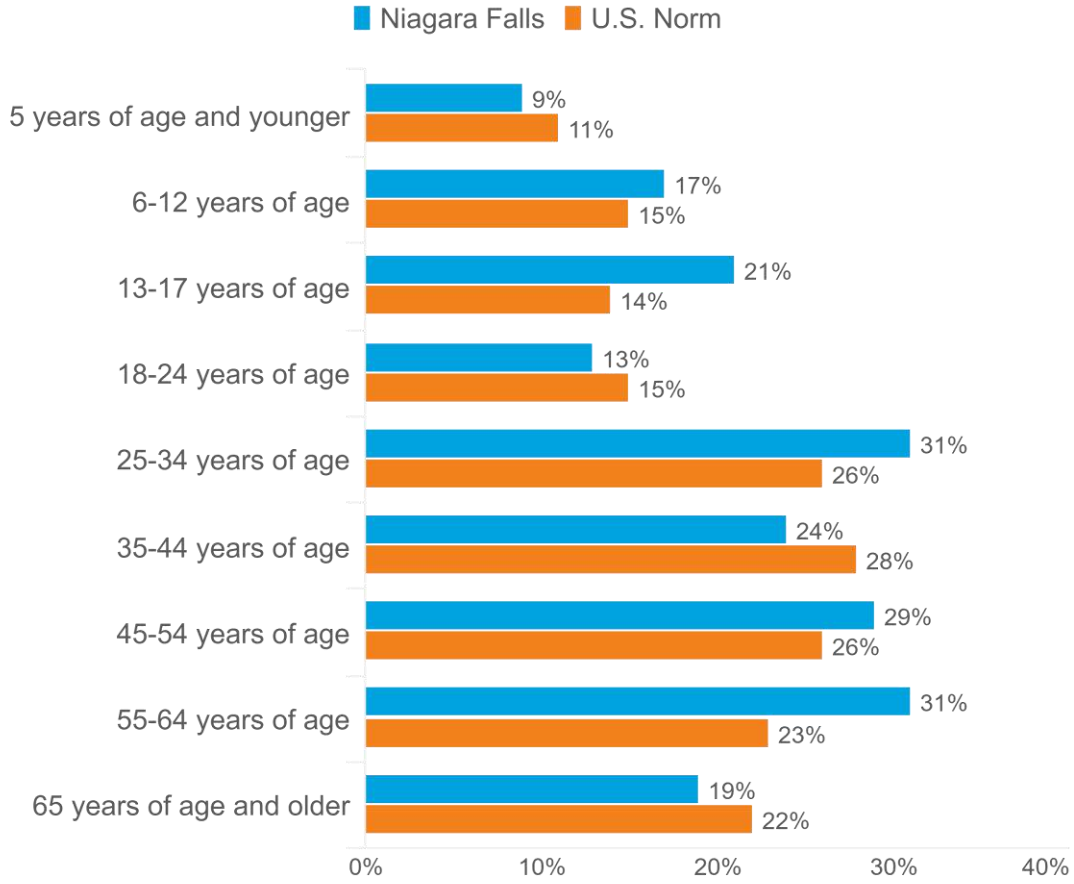
U.S. Norm: 25%

Composition of Immediate Travel Party

Base: 2023 Day Person-Trips that included more than one person



Travel Party Age



Question added in 2023, data is for 2023 only

Niagara Falls: During Trip

Base: 2022/2023 Day Person-Trips

Activity Groupings

Outdoor Activities

52%

U.S. Norm: 32%

Entertainment Activities

71%

U.S. Norm: 40%

Cultural Activities

41%

U.S. Norm: 20%

Sporting Activities

17%

U.S. Norm: 14%

Business Activities

11%

U.S. Norm: 10%

Question updated in 2020

Activities and Experiences (Top 10)

	Niagara Falls	U.S. Norm
Shopping	33%	21%
Sightseeing	28%	14%
Casino	23%	7%
Landmark/historic site	23%	8%
National/state park	22%	5%
Museum	18%	7%
Bar/nightclub	14%	7%
Nature tours/wildlife viewing/birding	12%	5%
Local parks/playgrounds	11%	6%
Theme park	10%	5%

Niagara Falls: During Trip

Base: 2023 Day Person-Trips

Shopping Types on Trip

Base: 2023 Day Person-Trips that included Shopping

	Niagara Falls	U.S. Norm
Outlet/mall shopping	**46%**	**45%**
Shopping at locally owned businesses	**30%**	**42%**
Big box stores (Walmart, Costco)	**28%**	**26%**
Souvenir shopping	**26%**	**23%**
Convenience/grocery shopping	**21%**	**26%**
Antiquing	**12%**	**12%**
Farmers market	**10%**	**13%**

Question updated in 2023, data is for 2023 only

Dining Types on Trip

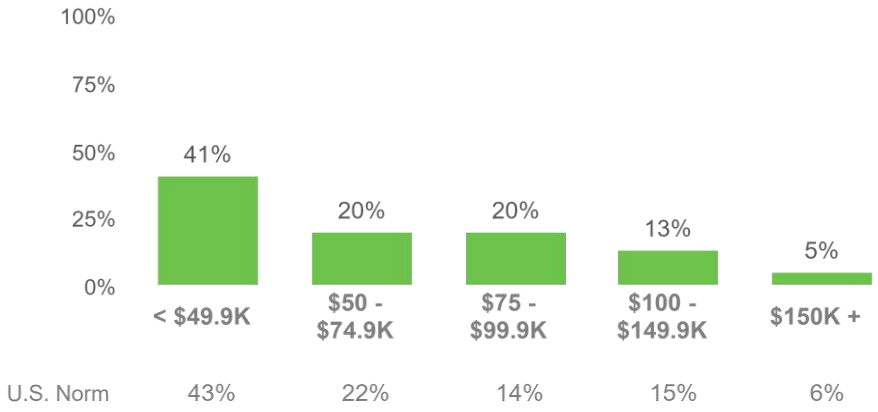
	Niagara Falls	U.S. Norm
Casual dining	**49%**	**43%**
Fast food	**33%**	**39%**
Unique/local food	**32%**	**20%**
Carry-out/food delivery service	**13%**	**12%**
Fine/upscale dining	**13%**	**10%**
Picnicking	**4%**	**9%**

Question updated in 2023, data is for 2023 only

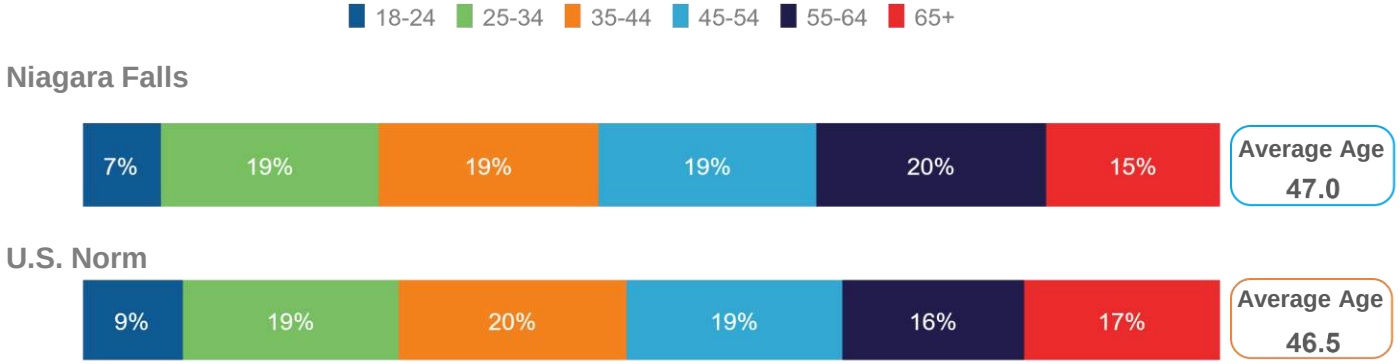
Demographic Profile of Day Niagara Falls Visitors

Base: 2022/2023 Day Person-Trips

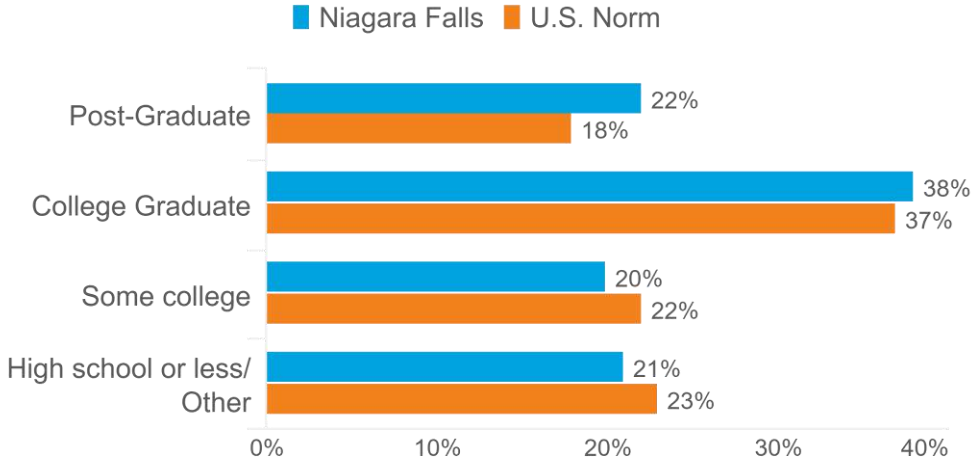
Household Income



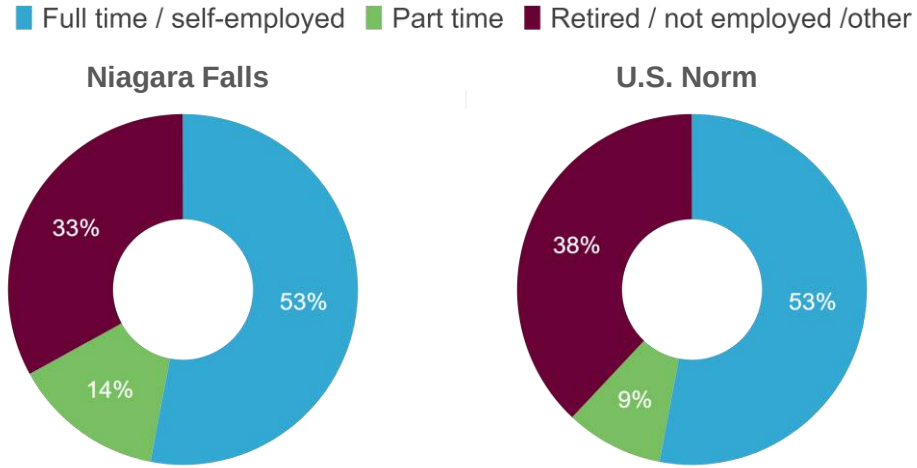
Age



Educational Attainment



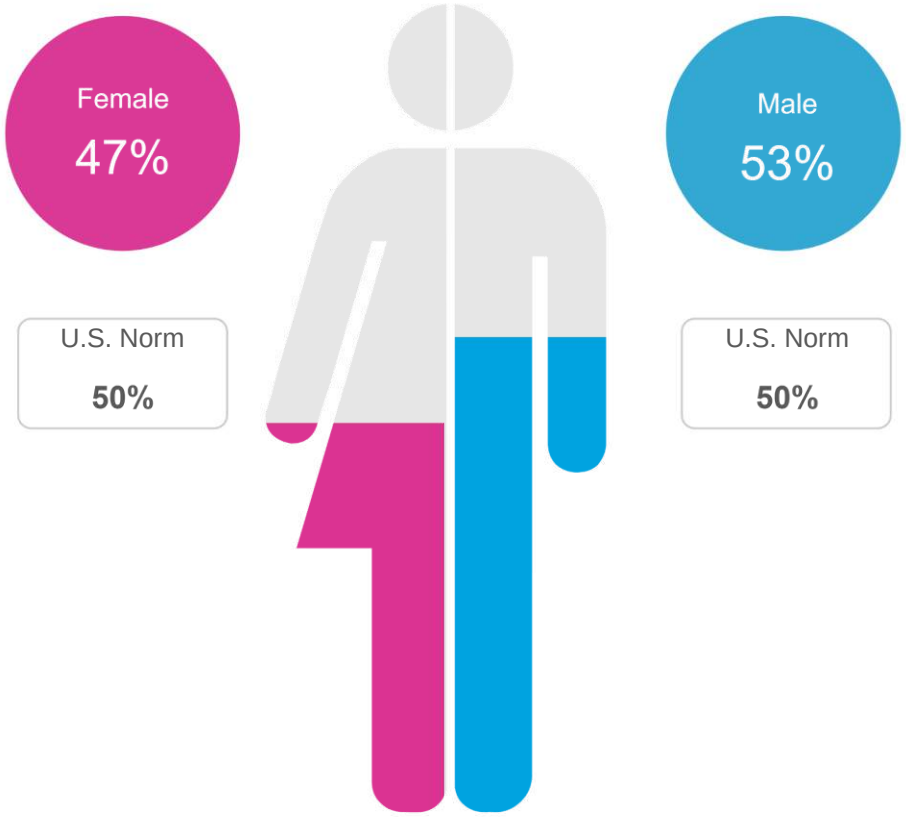
Employment



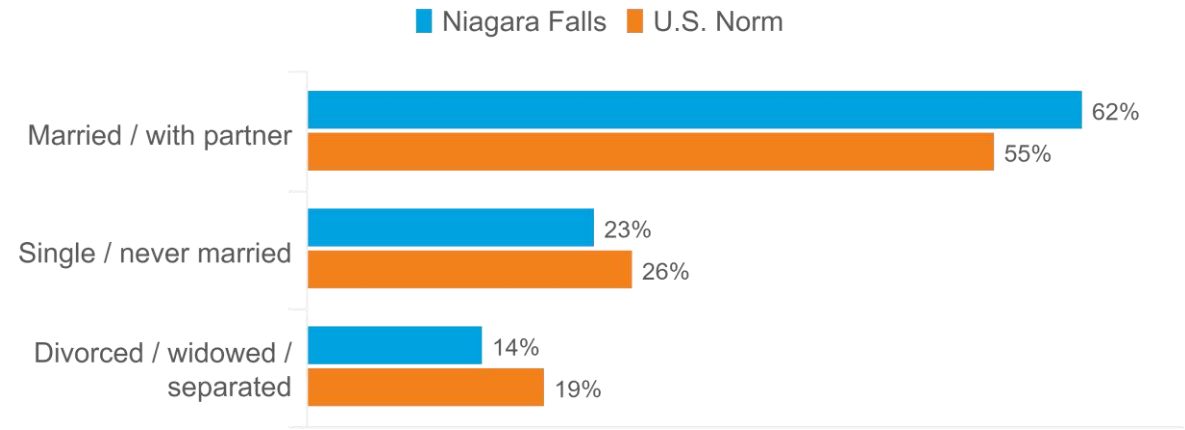
Demographic Profile of Day Niagara Falls Visitors

Base: 2022/2023 Day Person-Trips

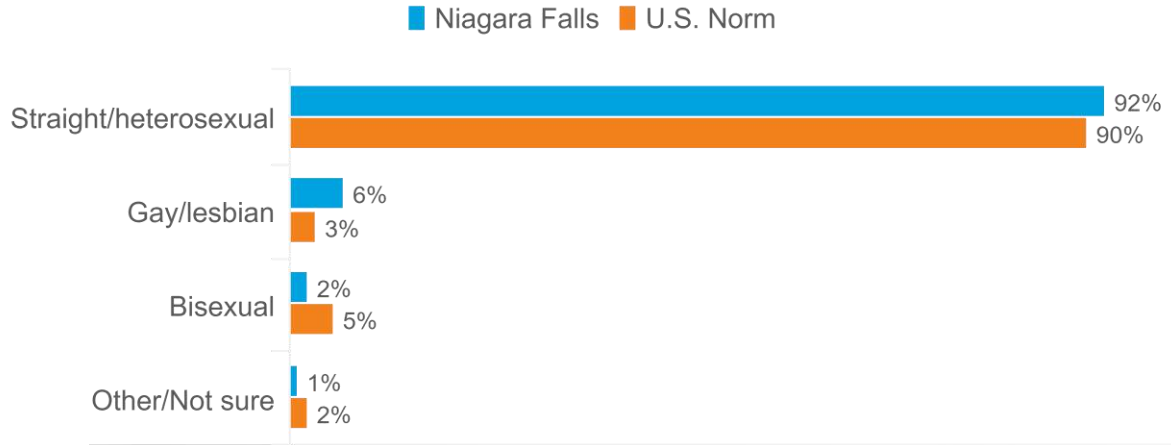
Gender



Marital Status



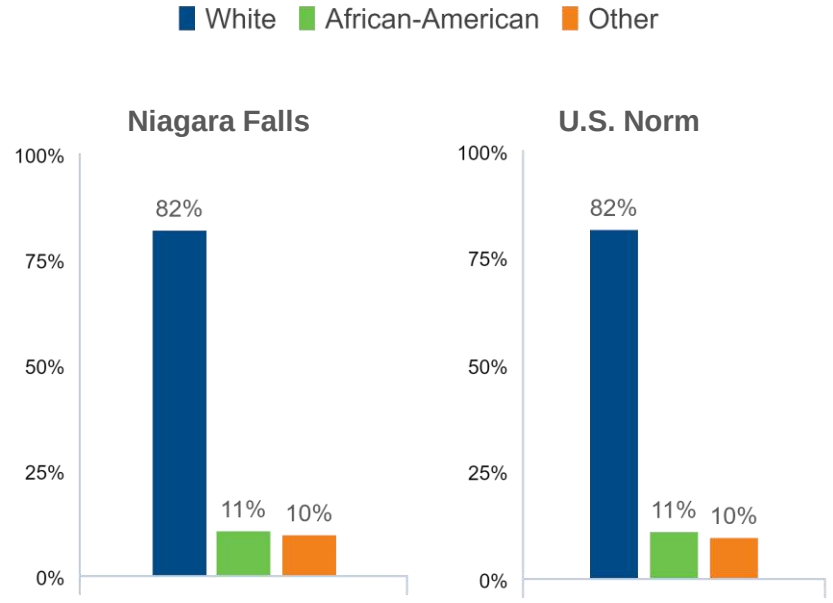
Sexual Orientation



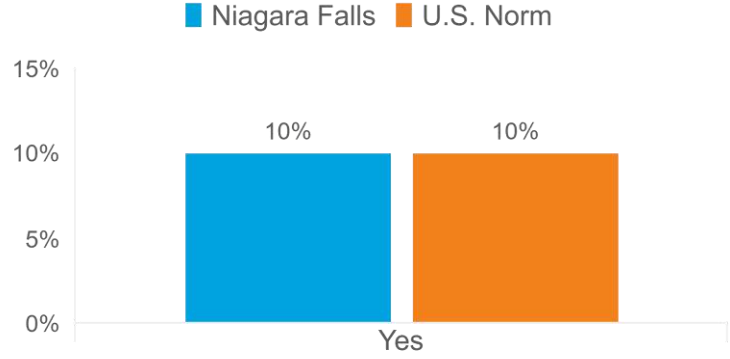
Demographic Profile of Day Niagara Falls Visitors

Base: 2022/2023 Day Person-Trips

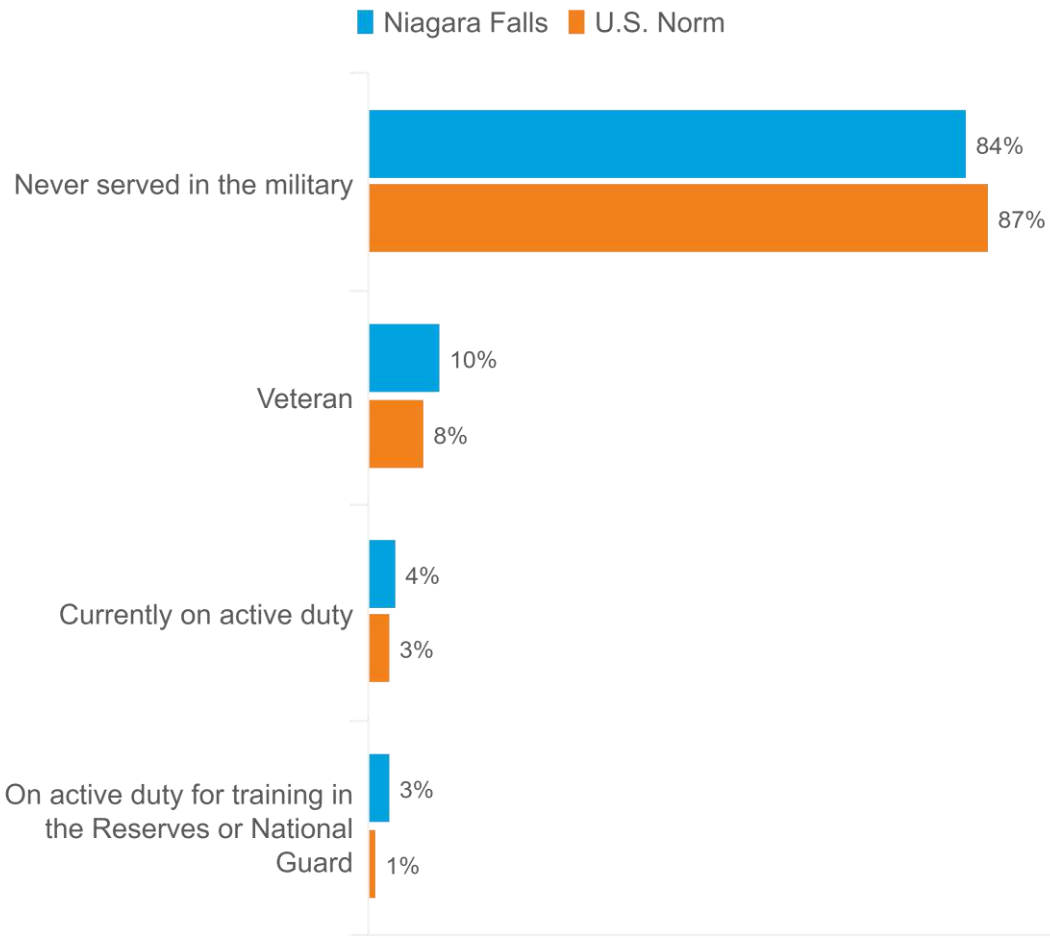
Race



Hispanic Background



Military Status



Demographic Profile of Day Niagara Falls Visitors

Base: 2022/2023 Day Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	23%	36%	17%	16%	8%
U.S. Norm	23%	34%	18%	15%	10%

Children in Household

Niagara Falls

No children under 18	54%
Any 13-17	26%
Any 6-12	22%
Any child under 6	13%

U.S. Norm

No children under 18	57%
Any 13-17	21%
Any 6-12	23%
Any child under 6	15%

COMPASS
Longwoods
INTERNATIONAL