COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2024

Size of the Niagara Falls Travel Market

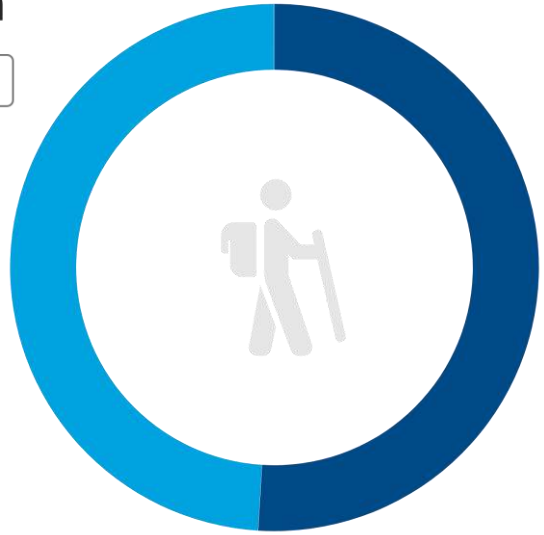
Base: 2024 Person-Trips

Total Size of Niagara Falls 2024 Domestic Travel Market

Total Person-Trips

11.0 Million

+4.1% vs. last year



Day
49% 5.4 Million

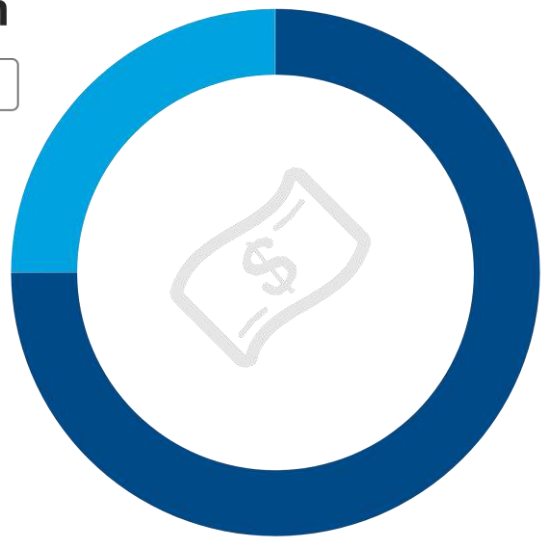
Overnight
51% 5.6 Million

Total Expenditures for Niagara Falls 2024 Domestic Travel Market

Total Spending

$ 1.9 Billion

+7.7% vs. last year



Day
25% $0.5 Billion

Overnight
75% $1.4 Billion

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Travel USA Visitor Profile

Overnight Visitation

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2024

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 of Niagara Falls' domestic tourism business in 2024.

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 2024:

Overnight Base Size

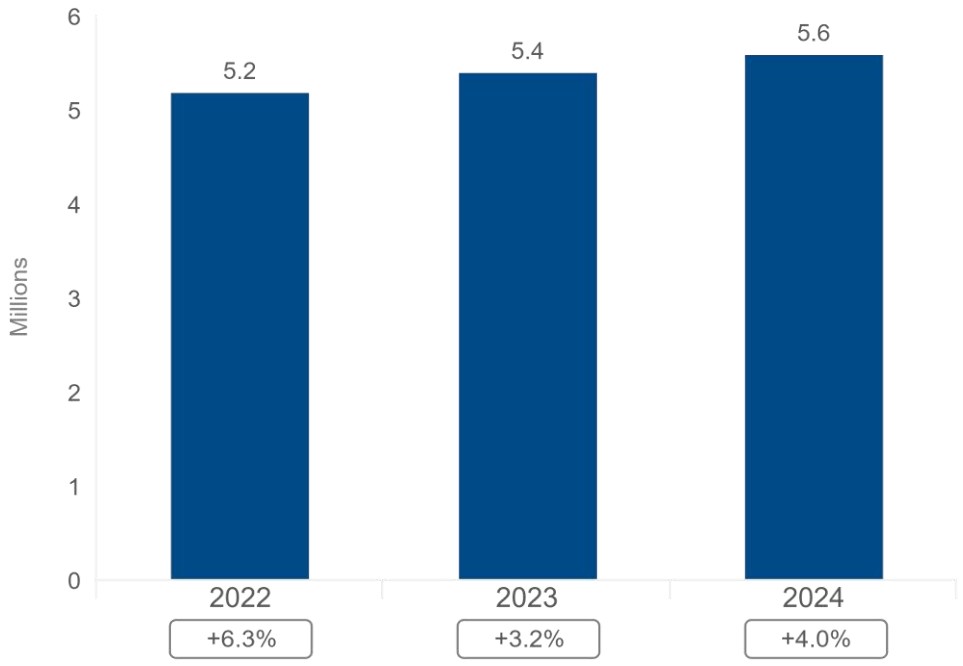
410

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' Domestic Travel Market

Base: 2024 Overnight Person-Trips

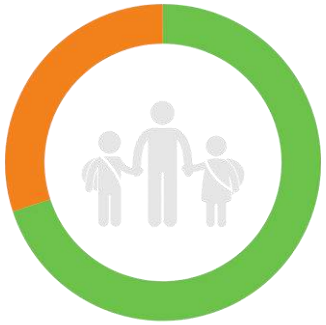
Overnight Trips to Niagara Falls



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

Total Overnight Person-Trips

5.6 Million



Adults
70% 4.0 Million

Children
30% 1.7 Million

Past Visitation to Niagara Falls

70% of overnight travelers to Niagara Falls are repeat visitors

48% of overnight travelers to Niagara Falls had visited before in the past 12 months

Niagara Falls' Overnight Trip Expenditures

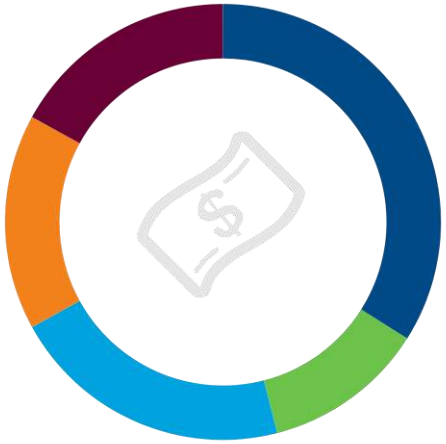
Base: 2024 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

$ 1.400 Billion

+7.7% vs. last year

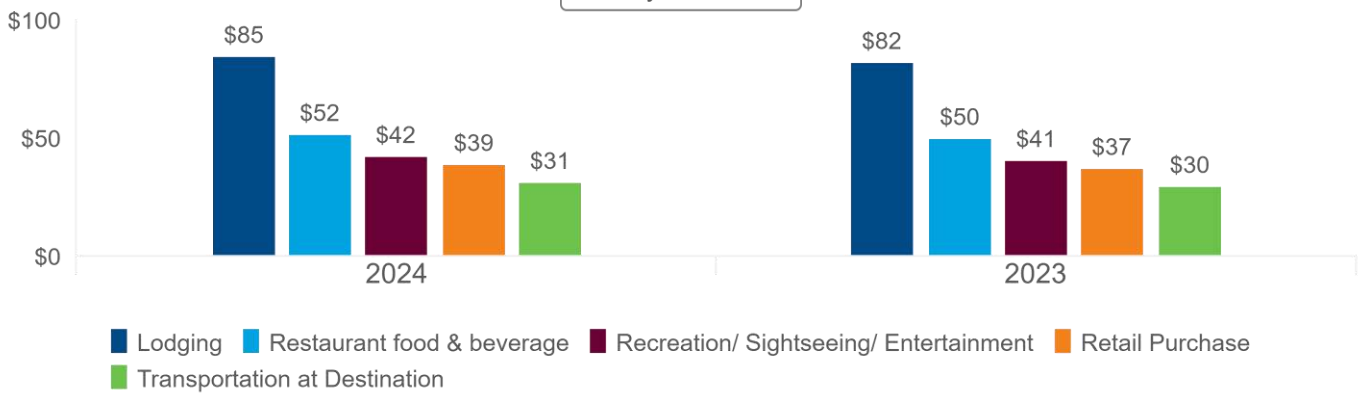


			vs. last year
Lodging	34%	$481 Million	+8.3%
Transportation at Destination	12%	$174 Million	+7.4%
Restaurant Food & Beverage	21%	$292 Million	+8.5%
Retail Purchase	16%	$218 Million	+7.3%
Recreation/Entertainment	17%	$236 Million	+6.3%

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

Average Per Person Per Trip: $249

Last year: $240



Average Per Person Per Trip:

Leisure $245

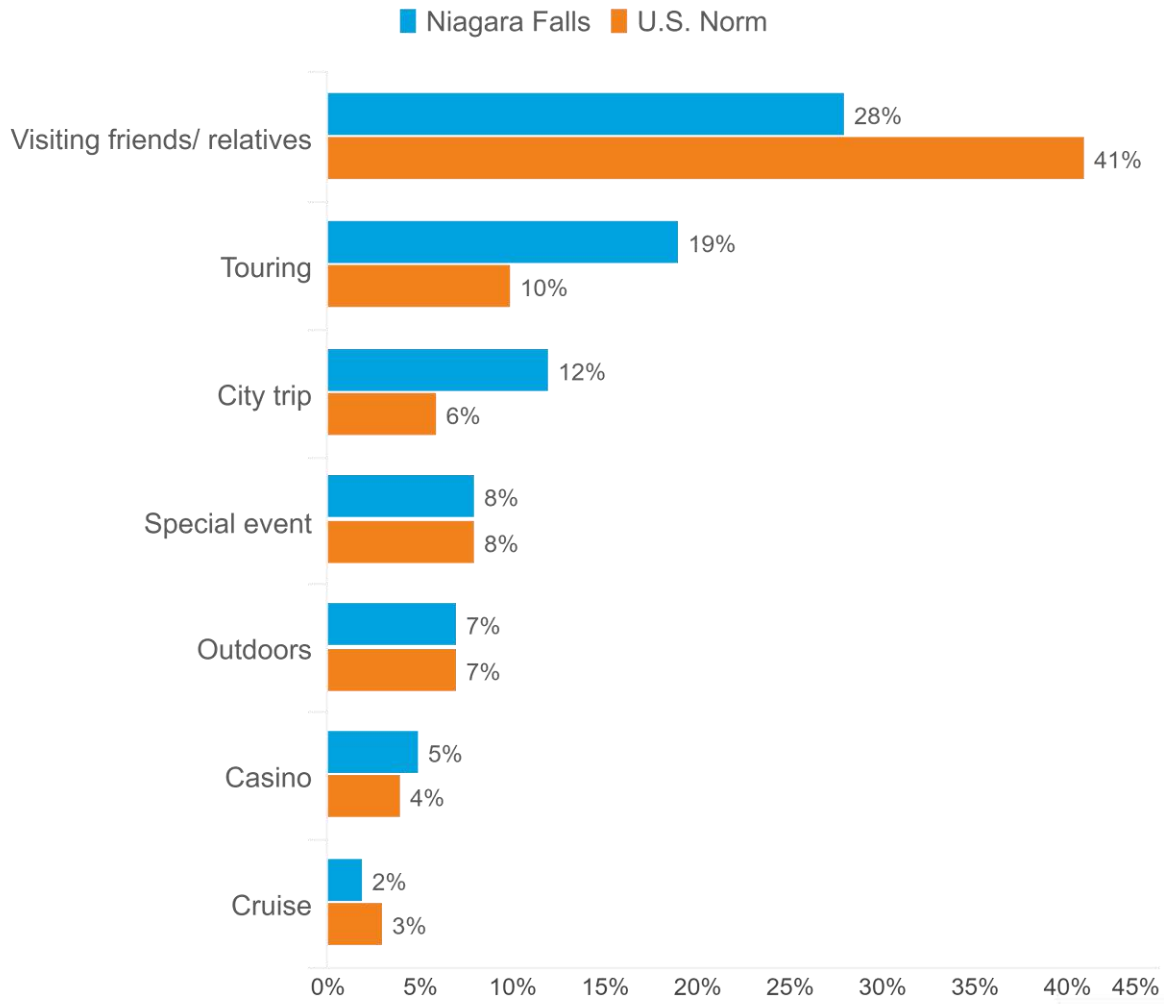
Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

Main Purpose of Trip

	2024
Visiting friends/ relatives	28%
Touring	19%
City trip	12%
Special event	8%
Outdoors	7%
Business-Leisure	5%
Casino	5%
Conference/ Convention	5%
Other business trip	3%
Cruise	2%
Resort	2%
Theme park	2%
Ski/Snowboarding	1%
Golf Trip	1%

Main Purpose of Leisure Trip (Top 7)



Structure of the Niagara Falls Overnight Travel Market

Base: 2024 Overnight Person-Trips

2024 Niagara Falls Overnight Trips

Visiting friends/relatives	28%
Marketable	59%
Business	7%
Business-leisure	5%

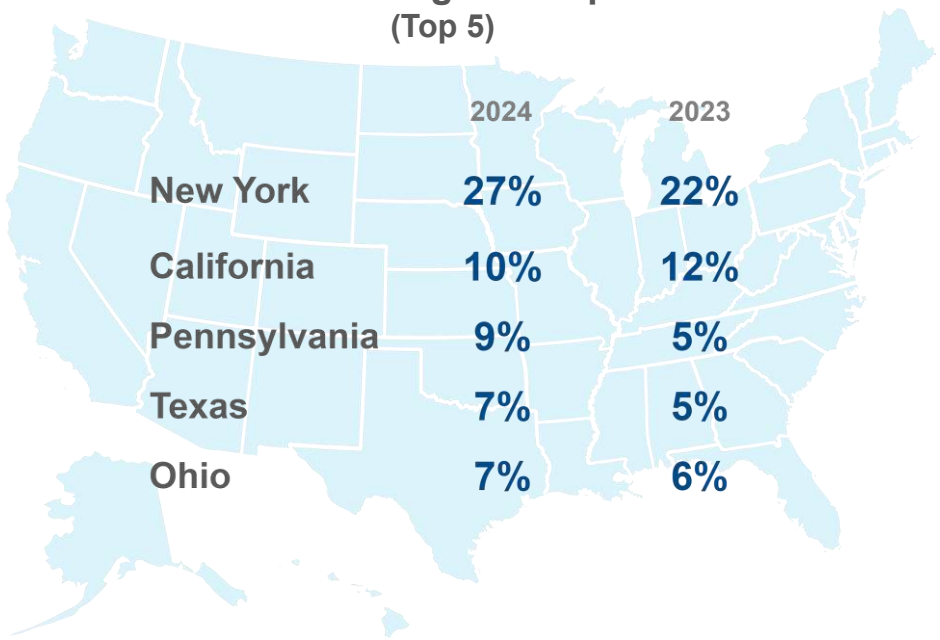
2024 U.S. Overnight Trips

Visiting friends/relatives	41%
Marketable	48%
Business	8%
Business-leisure	4%

Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

State Origin of Trip
(Top 5)



	2024	2023
New York	27%	22%
California	10%	12%
Pennsylvania	9%	5%
Texas	7%	5%
Ohio	7%	6%

Season of Trip
Total Overnight Person-Trips

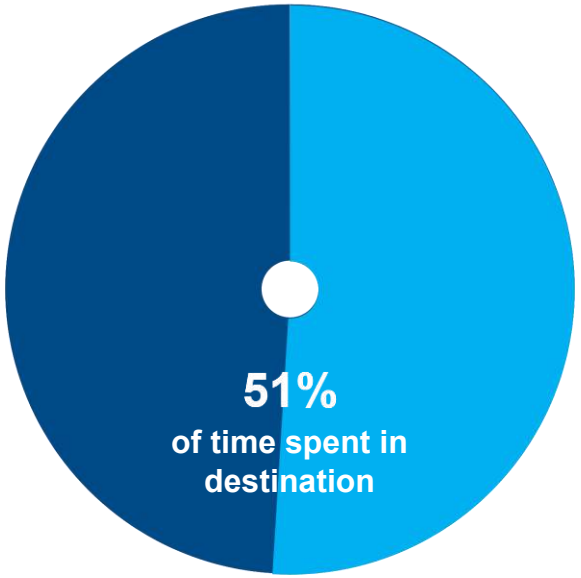
DMA Origin of Trip
(Top 7)

	2024	2023
New York, NY	17%	11%
Los Angeles, CA	7%	11%
Buffalo, NY	6%	4%
Dallas-Ft. Worth, TX	4%	3%
Cleveland, OH	3%	2%
Philadelphia, PA	3%	2%
Pittsburgh, PA	3%	3%

Niagara Falls' Overnight Trip Characteristics

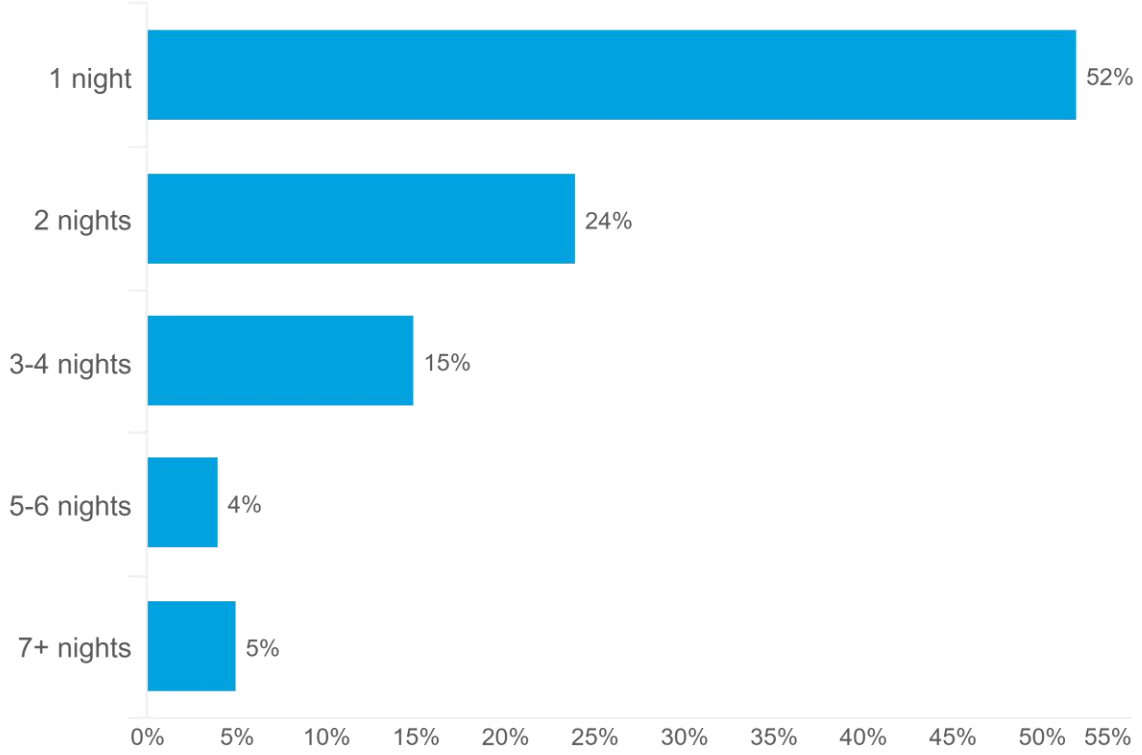
Base: 2024 Overnight Person-Trips

Total Nights Away on Trip



Of the nights spent in the destination

Nights Spent in Niagara Falls



Niagara Falls
4.2
Average Nights

U.S. Norm
3.7
Average Nights

Average number of nights
2.1

Average last year
2.3

Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

Size of Travel Party

Adults Children

*Children is based on age, anyone under the age of 18

Niagara Falls

Total **3.1**

Average number of people

U.S. Norm

Total **2.8**

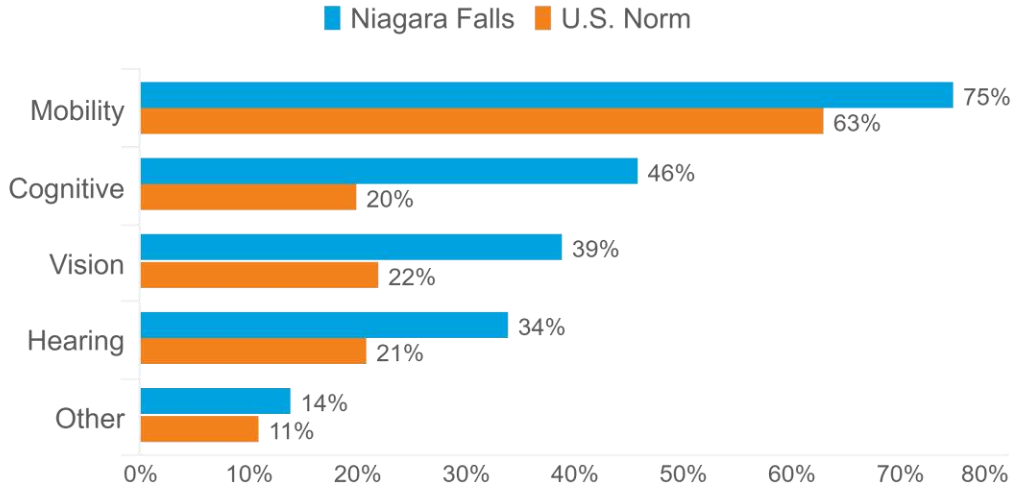
Average number of people

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

U.S. Norm: 18%

Disability Categorization

Disability Categorization only asked to those with travel limiting disabilities within travel party



Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

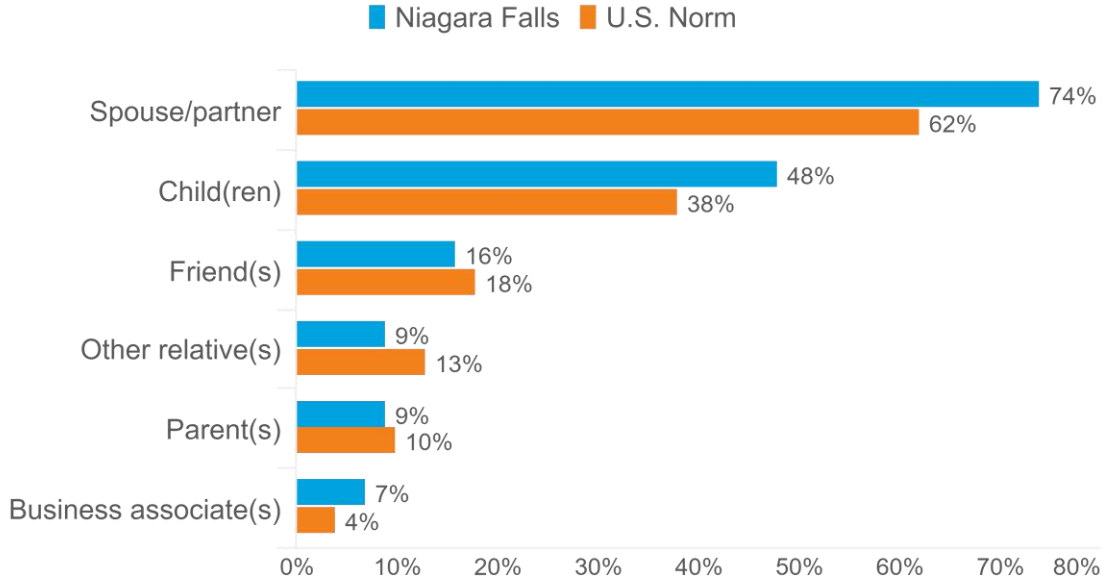
18% **of trips only had one person in the travel party**

U.S. Norm: 26%

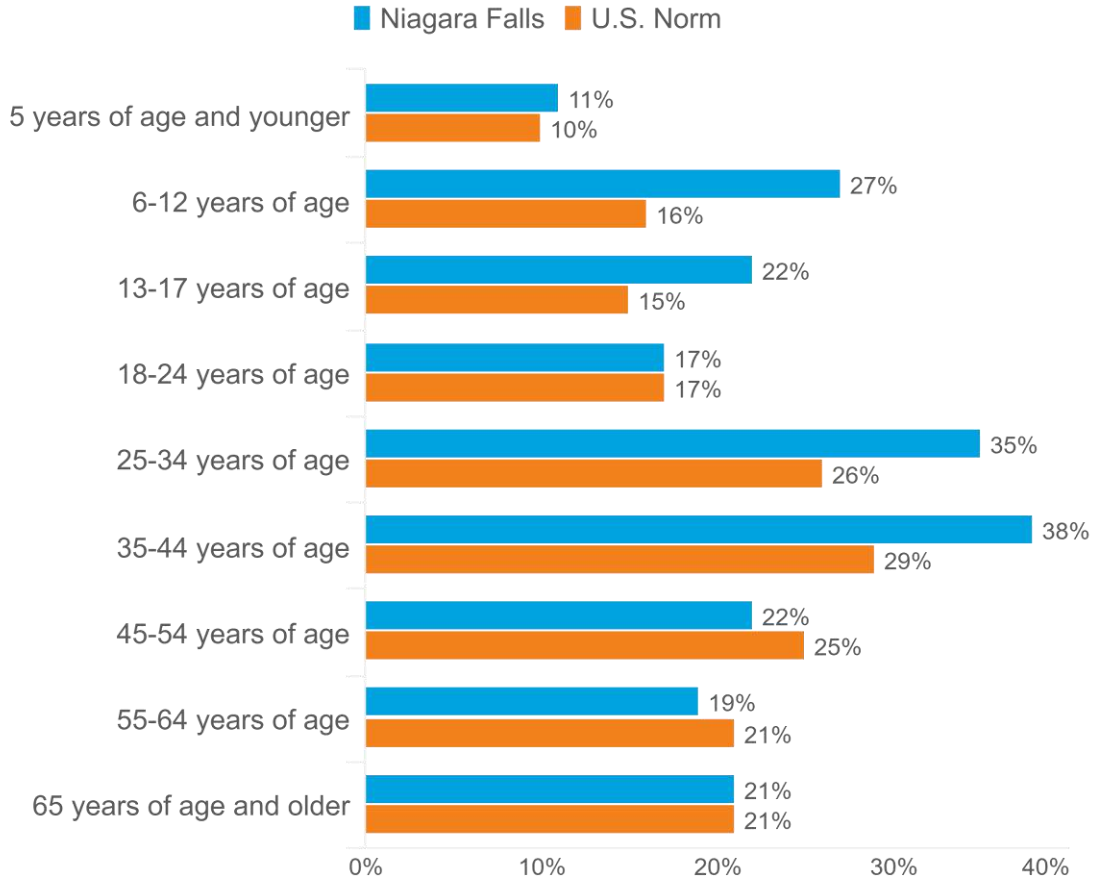
Composition of Immediate Travel Party

Base: 2024 Overnight Person-Trips that included more than one person

*Child(ren) is based on the relationship to the respondent



Travel Party Age



Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

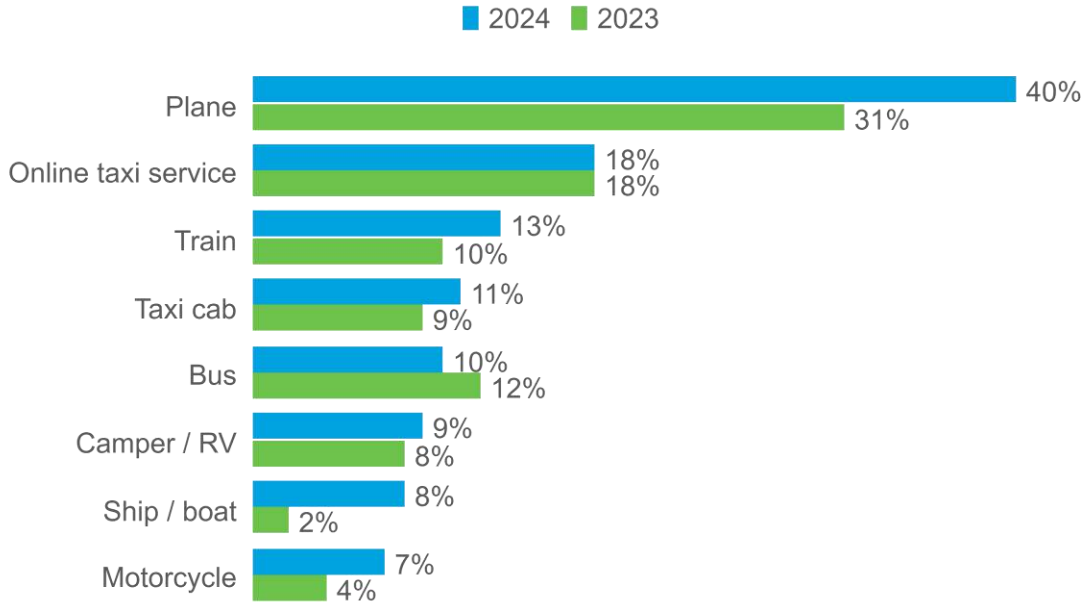
Transportation Used to Get to Destination

64% used their own car/truck to get to their destination

Previous year: 62%

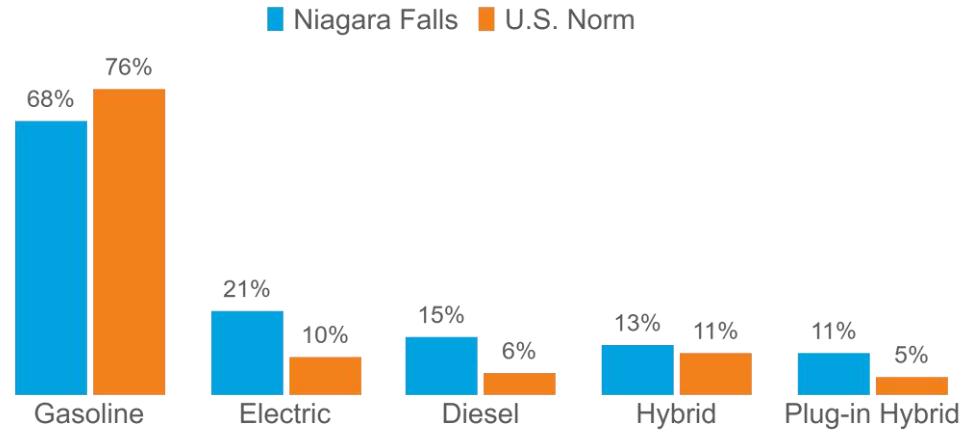
17% used a rental car to get to their destination

Previous year: 18%

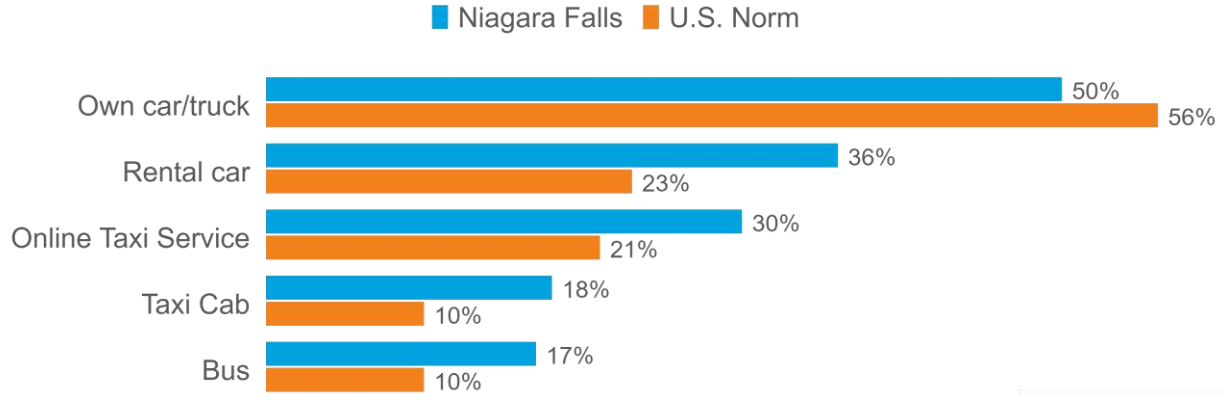


Question updated in 2020

Type of Vehicle Used to Get to Destination



Transportation Used Within Destination (Top 5)



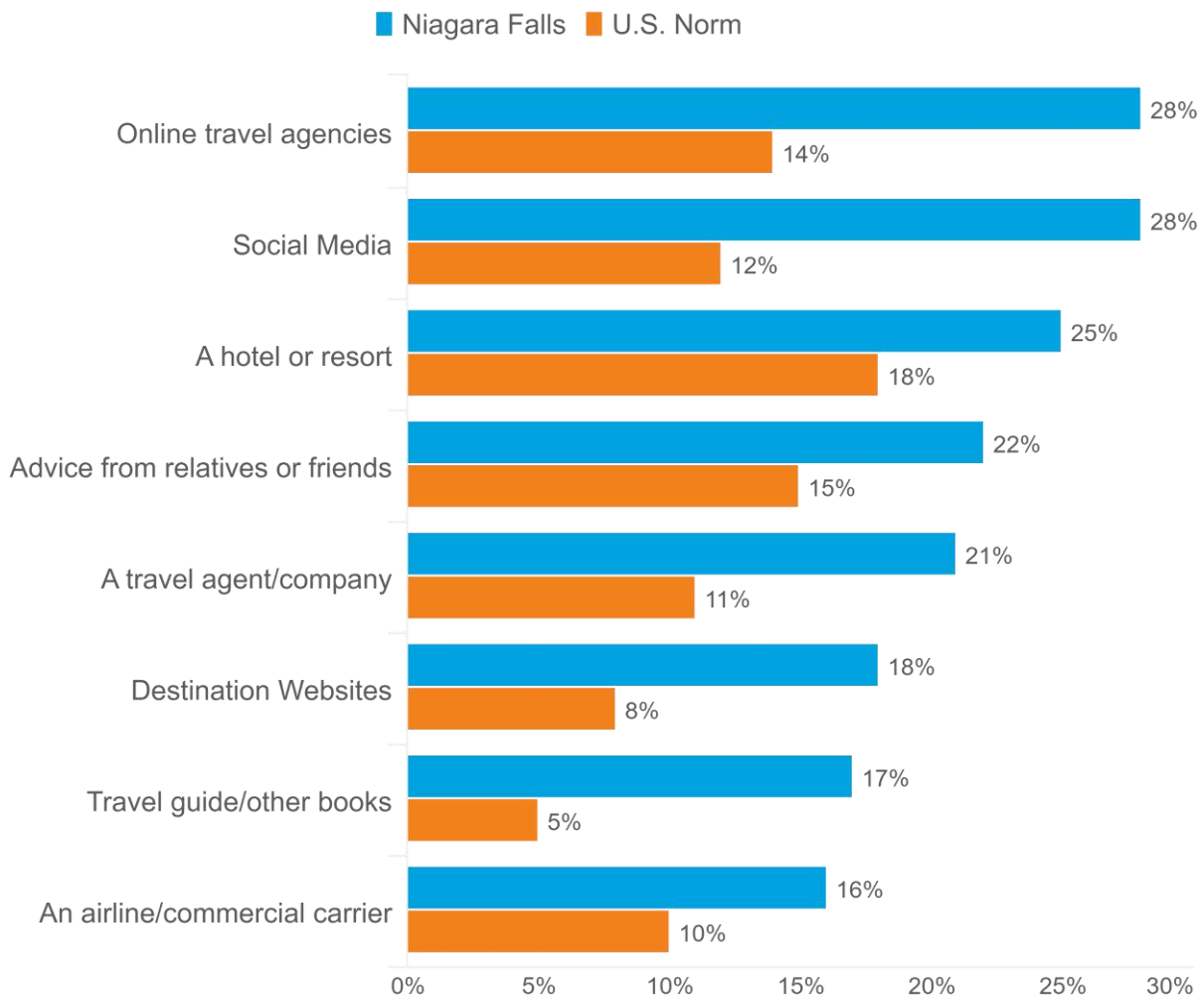
Niagara Falls: Pre-Trip

Base: 2024 Overnight Person-Trips

Length of Trip Planning

	Niagara Falls	U.S. Norm
1 month or less	**26%**	**32%**
2 months	**19%**	**17%**
3-5 months	**24%**	**18%**
6-12 months	**17%**	**14%**
More than 1 year in advance	**6%**	**4%**
Did not plan anything in advance	**7%**	**14%**

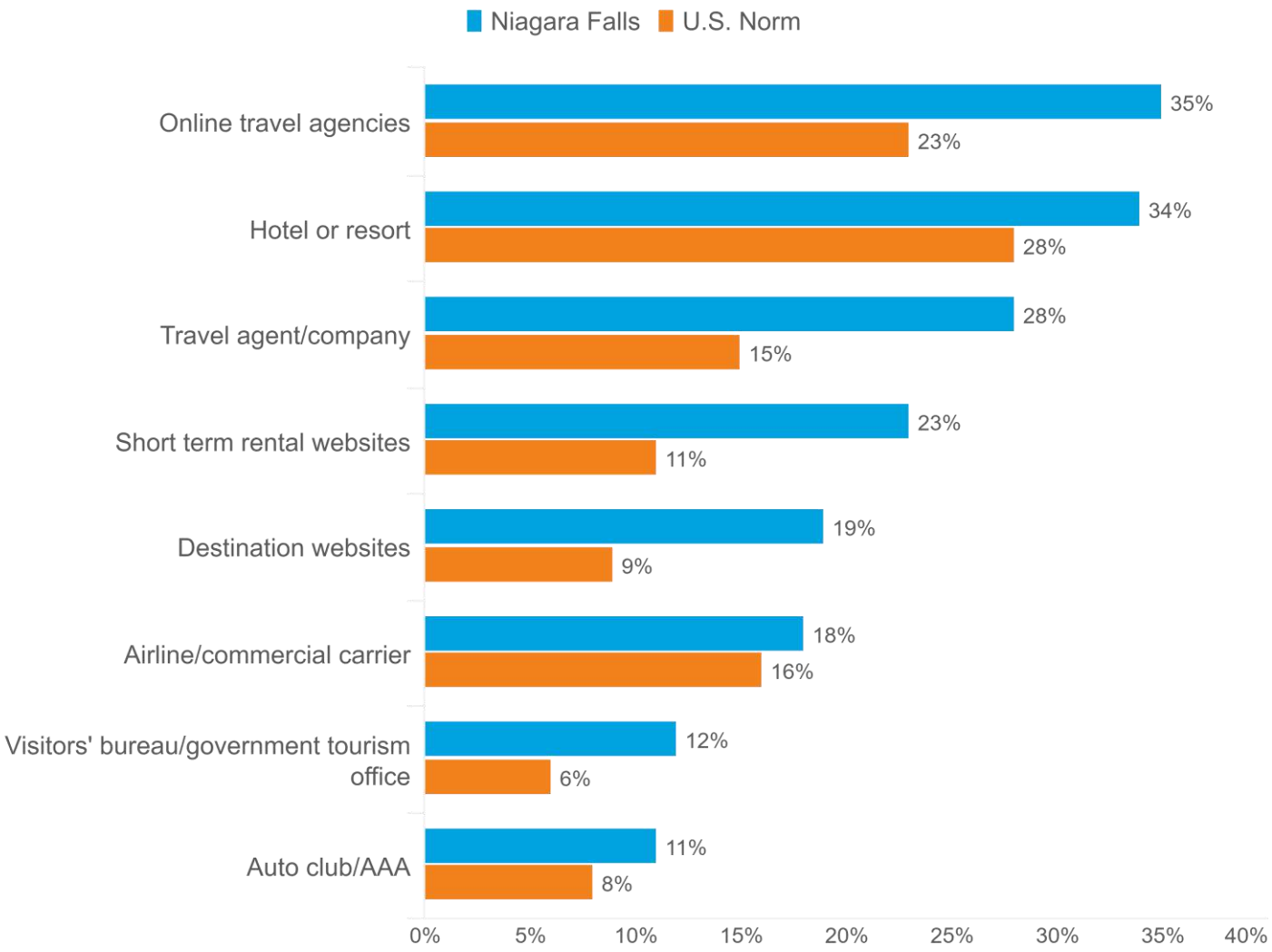
Trip Planning Information Sources (Top 8)



Niagara Falls' Overnight Trip Characteristics

Base: 2024 Overnight Person-Trips

Method of Booking
(Top 8)



Accommodations
(Top 7)

	2024	2023
Hotel	**61%**	**61%**
Home of friends / relatives	**15%**	**18%**
Resort hotel	**15%**	**14%**
Motel	**13%**	**12%**
Bed & breakfast	**12%**	**10%**
Rented home / condo / apartment	**11%**	**8%**
Own condo / apartment / cabin / second home	**8%**	**6%**

Niagara Falls: During Trip

Base: 2024 Overnight Person-Trips

Activity Groupings

Outdoor Activities

68%

U.S. Norm: 49%

Entertainment Activities

80%

U.S. Norm: 62%

Cultural Activities

62%

U.S. Norm: 31%

Sporting Activities

35%

U.S. Norm: 23%

Business Activities

27%

U.S. Norm: 17%

Other Activities

39%

U.S. Norm: 28%

Activities and Experiences

(Top 10)

	Niagara Falls	U.S. Norm
Shopping	42%	26%
Landmark/historic site	30%	13%
Museum	30%	12%
Sightseeing	29%	20%
National/state park	26%	8%
Bar/nightclub	25%	16%
Art gallery	23%	7%
Casino	22%	12%
Attending celebration	21%	14%
Aquarium	21%	6%

Niagara Falls: During Trip - Outdoor Activities

Base: 2024 Overnight Person-Trips

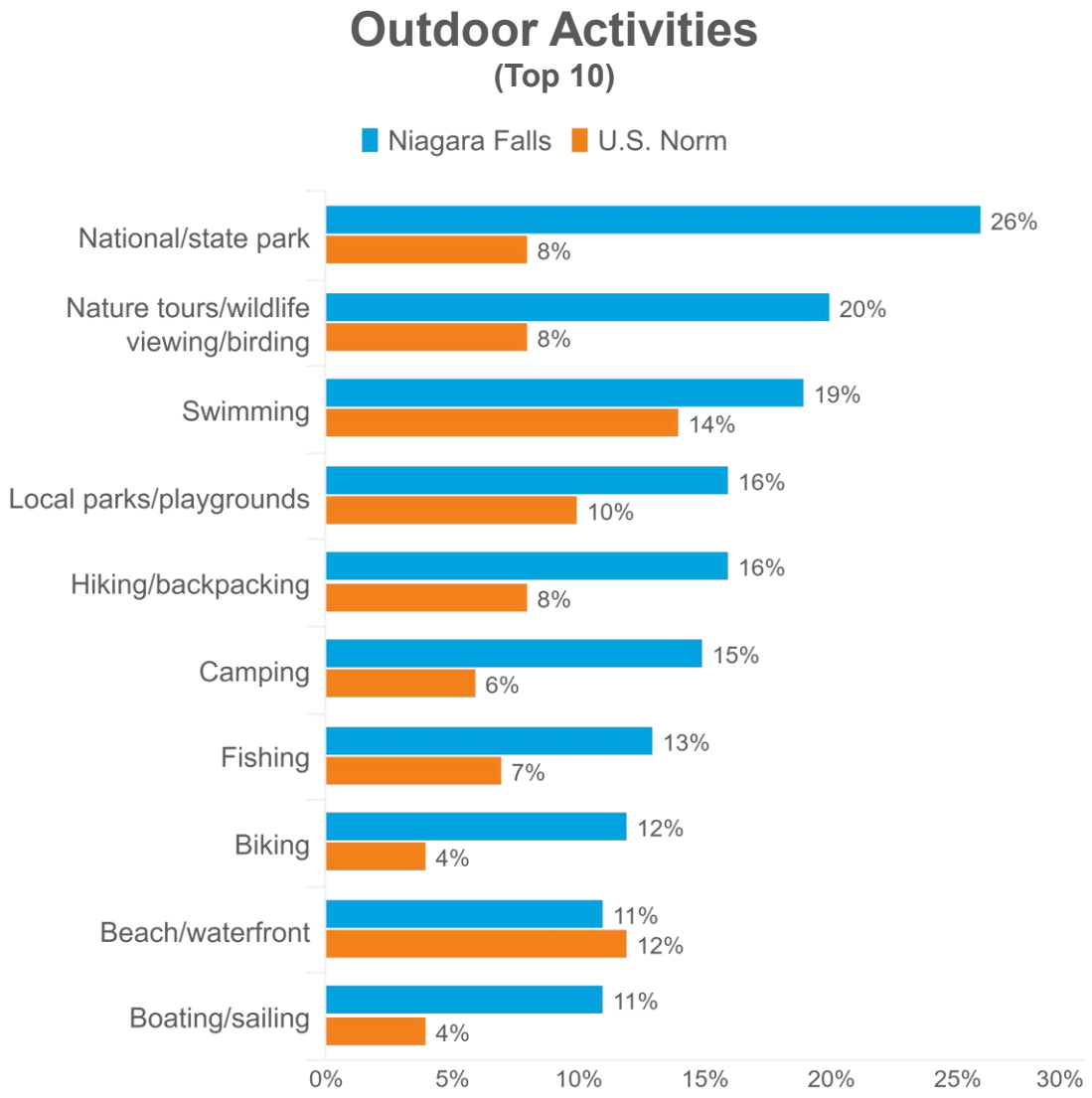
Outdoor Activities

Niagara Falls

68%

U.S. Norm

49%



Niagara Falls: During Trip - Entertainment Activities

Base: 2024 Overnight Person-Trips

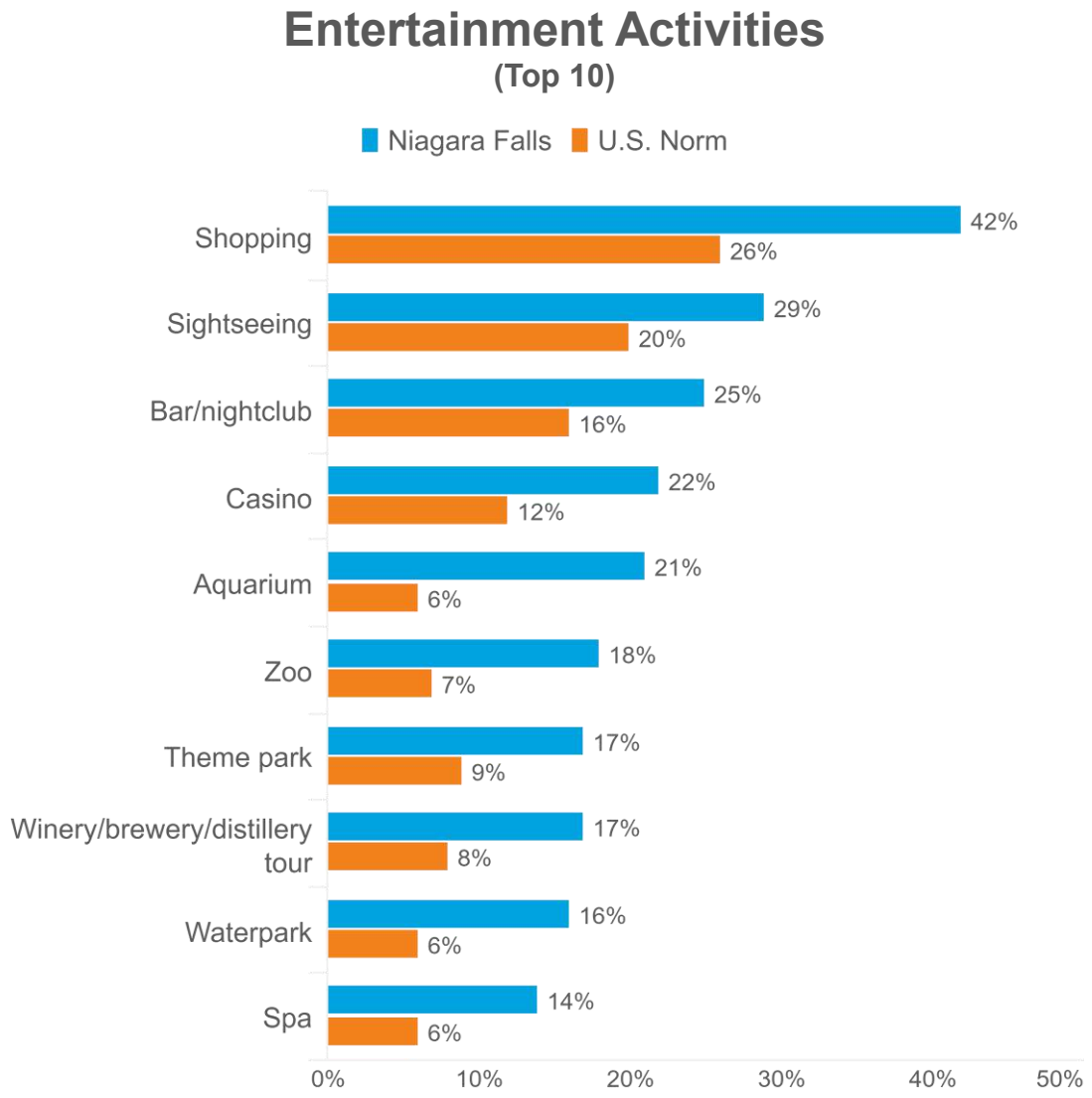
Entertainment Activities

Niagara Falls

80%

U.S. Norm

62%



Niagara Falls: During Trip - Cultural Activities

Base: 2024 Overnight Person-Trips

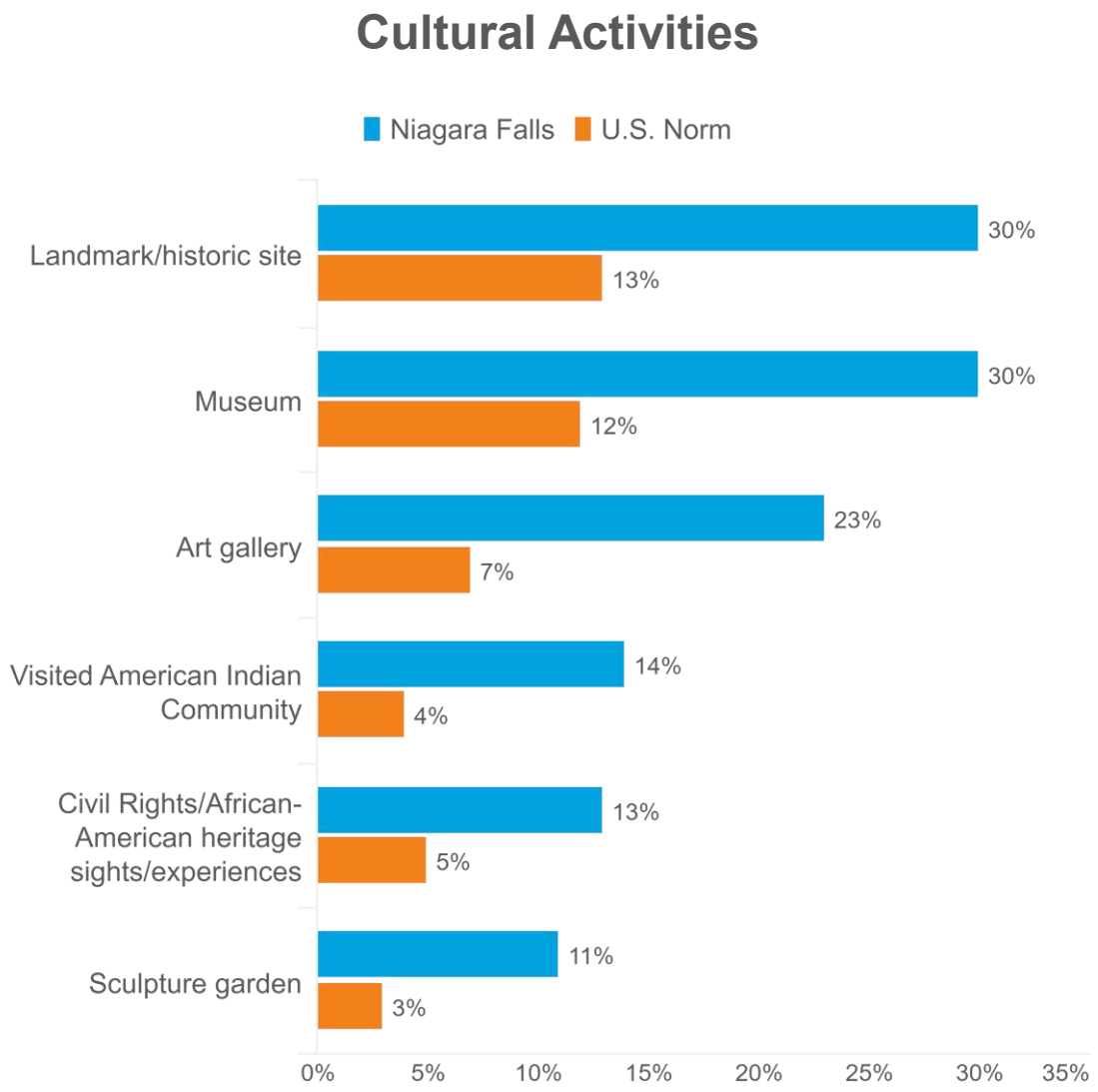
Cultural Activities

Niagara Falls

62%

U.S. Norm

31%



Niagara Falls: During Trip - Sporting Activities

Base: 2024 Overnight Person-Trips

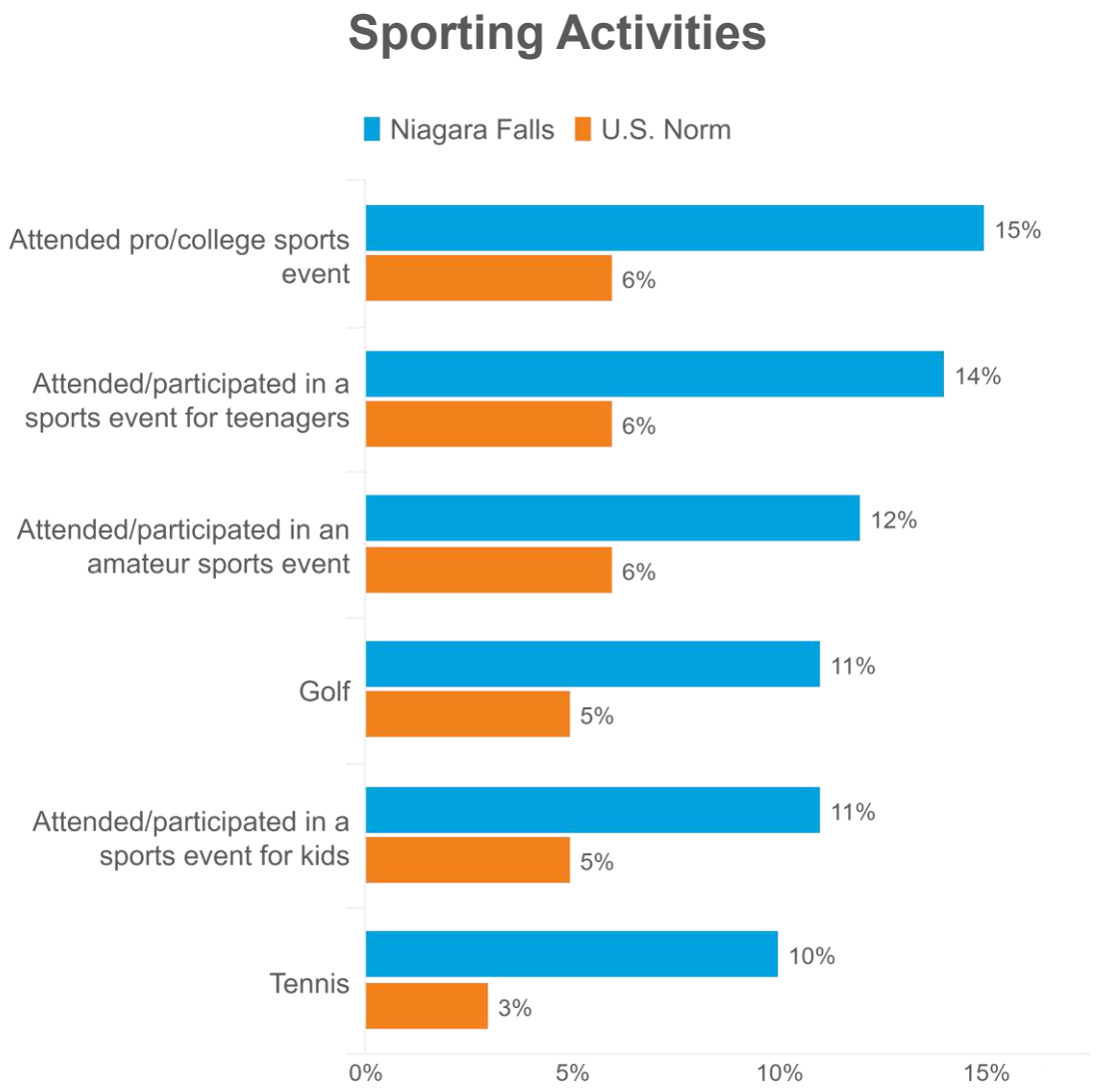
Sporting Activities

Niagara Falls

35%

U.S. Norm

23%



Niagara Falls: During Trip - Business Activities

Base: 2024 Overnight Person-Trips

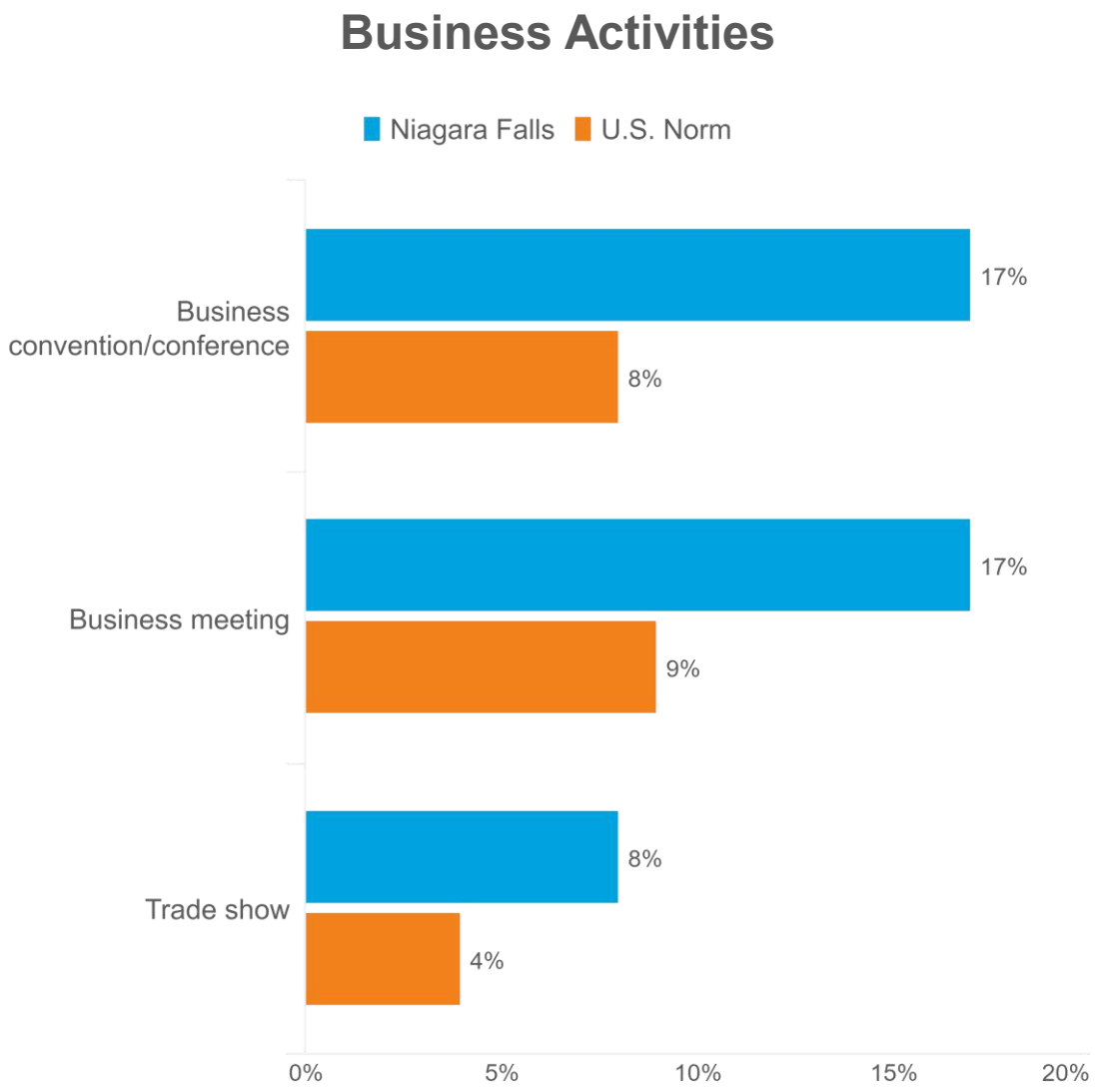
Business Activities

Niagara Falls

27%

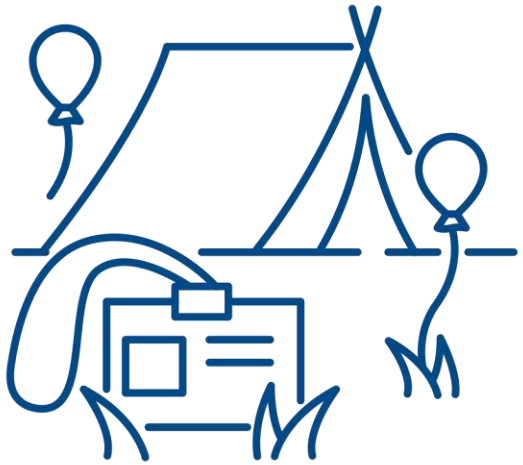
U.S. Norm

17%



Niagara Falls: During Trip - Other Activities

Base: 2024 Overnight Person-Trips



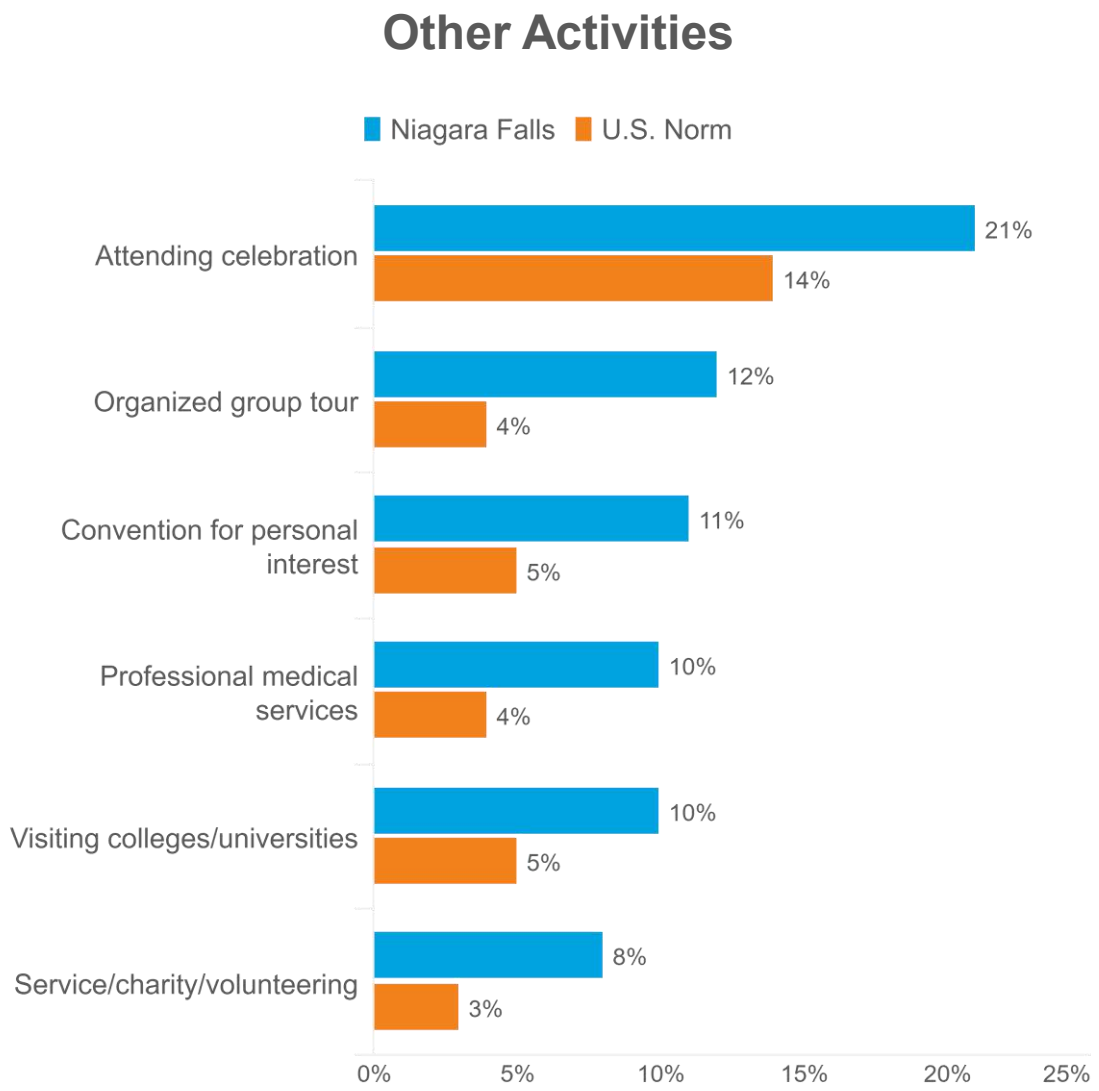
Other Activities

Niagara Falls

39%

U.S. Norm

28%



Niagara Falls: During Trip

Base: 2024 Overnight Person-Trips

Shopping Types on Trip

Base: 2024 Overnight Person-Trips that included Shopping

	Niagara Falls	U.S. Norm
Outlet/mall shopping	56%	45%
Souvenir shopping	55%	37%
Shopping at locally owned businesses	49%	48%
Convenience/grocery shopping	46%	43%
Big box stores (Walmart, Costco)	36%	30%
Farmers market	33%	17%
Antiquing	18%	12%

Dining Types on Trip

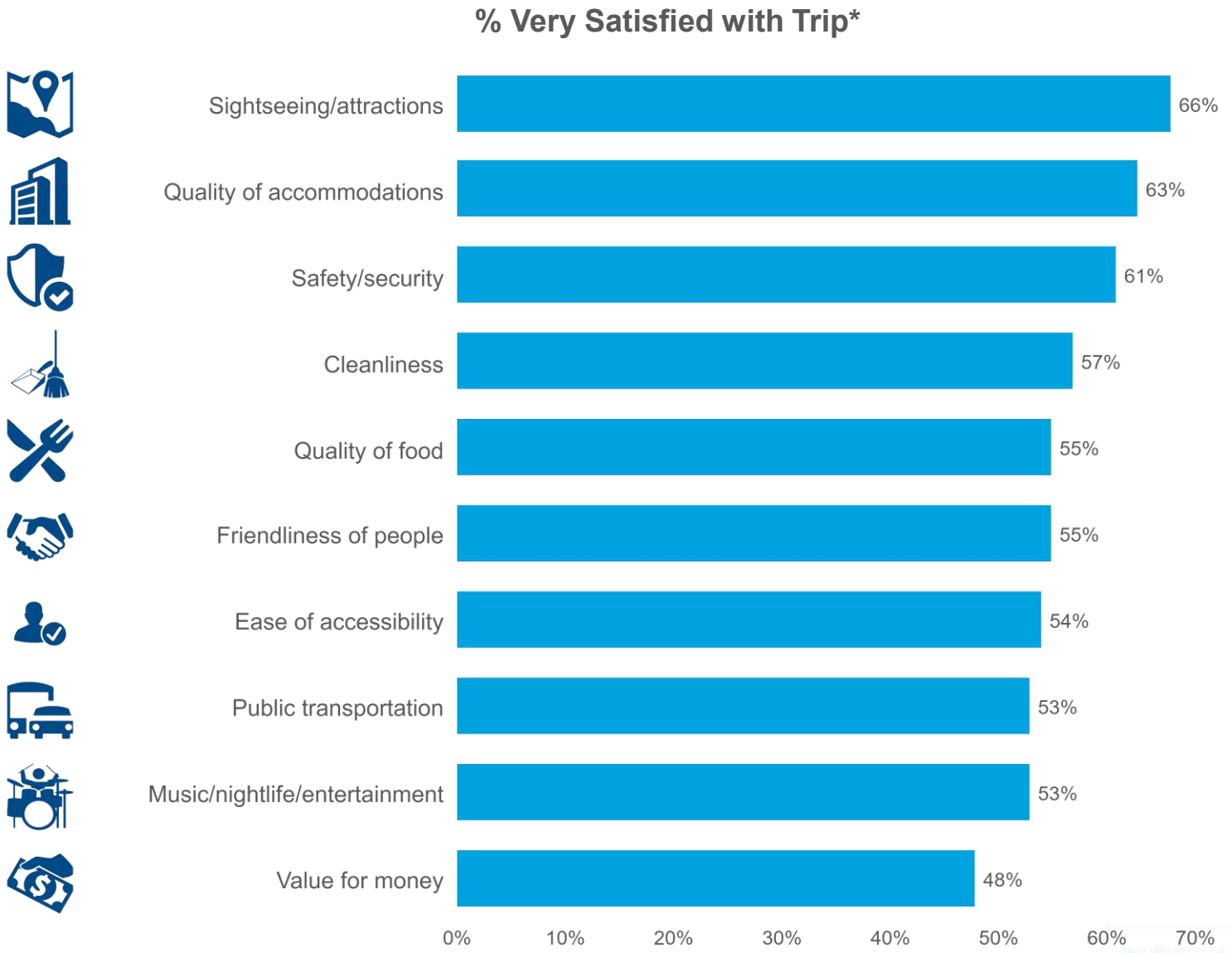
	Niagara Falls	U.S. Norm
Casual dining	69%	57%
Fast food	58%	45%
Unique/local food	49%	32%
Carry-out/food delivery service	38%	24%
Fine/upscale dining	34%	20%
Picnicking	21%	10%

Niagara Falls: During Trip

Base: 2024 Overnight Person-Trips

74%

of overnight travelers were very satisfied with their overall trip experience



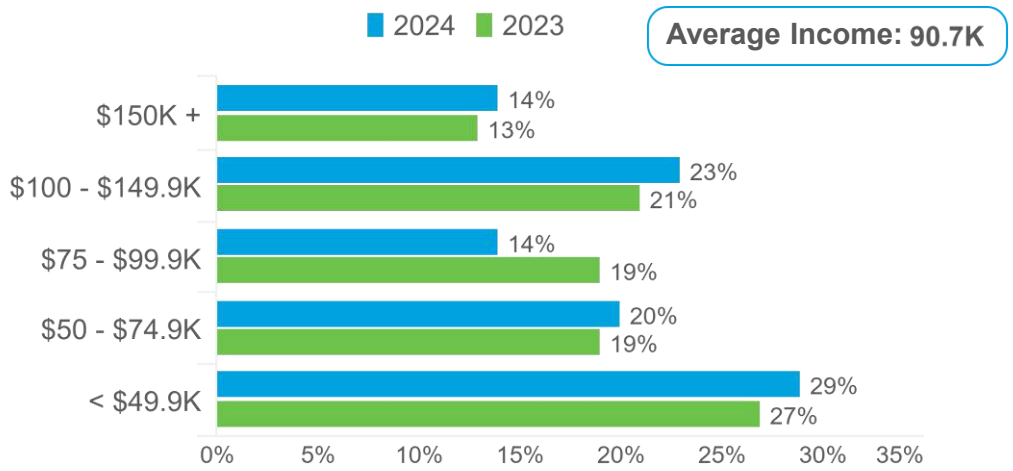
Question updated in 2020

*Very satisfied = selected top box on a five-point scale
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

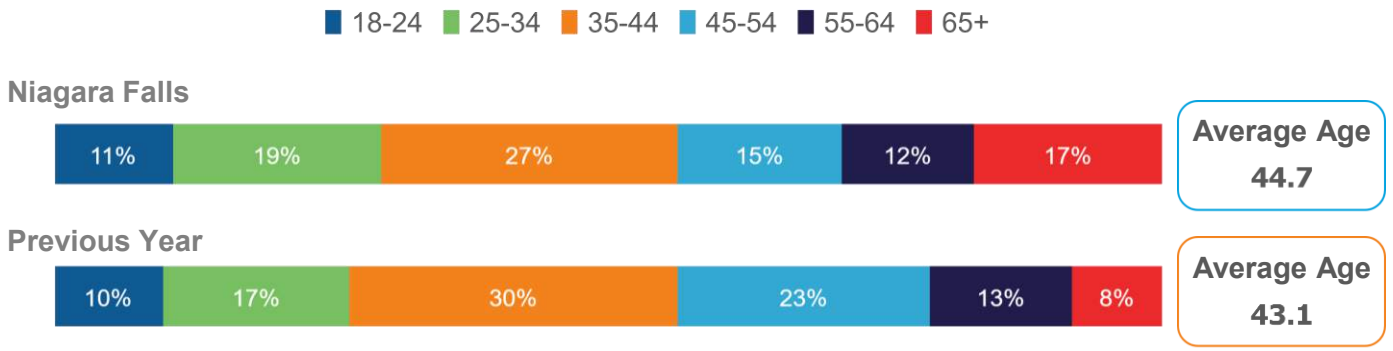
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2024 Overnight Person-Trips

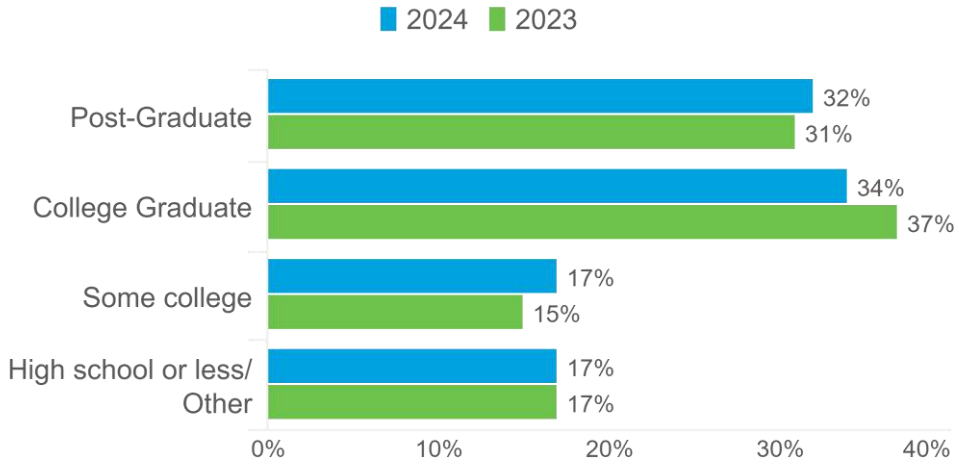
Household Income



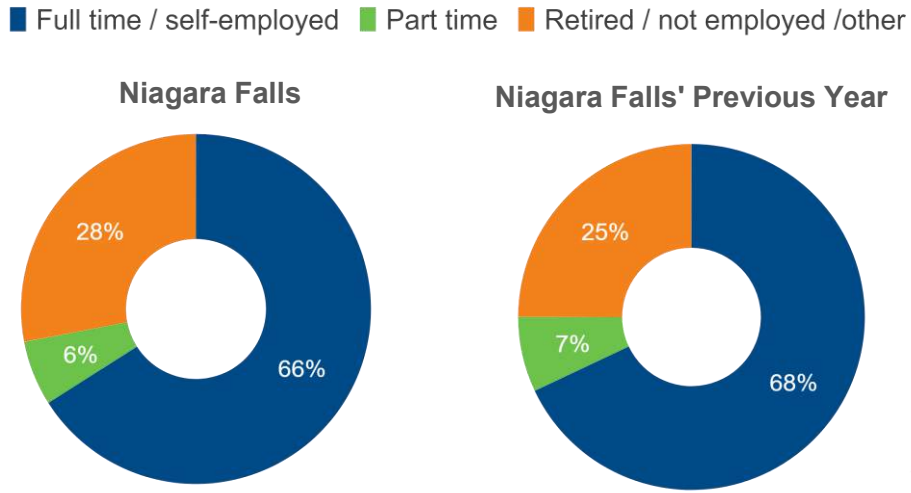
Age



Educational Attainment



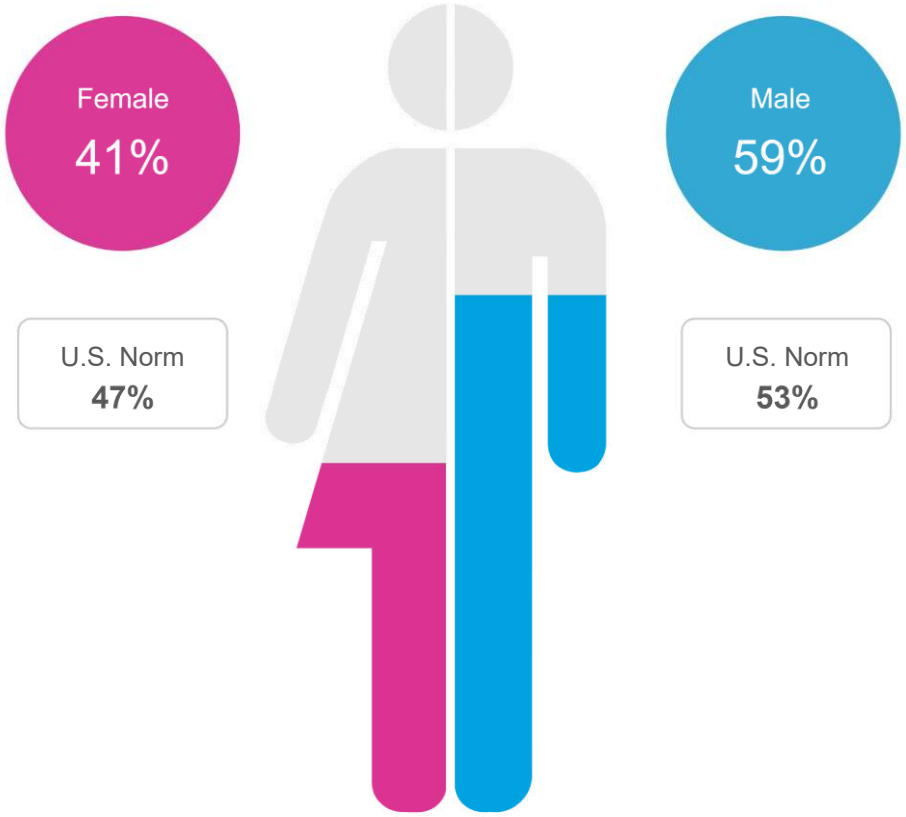
Employment



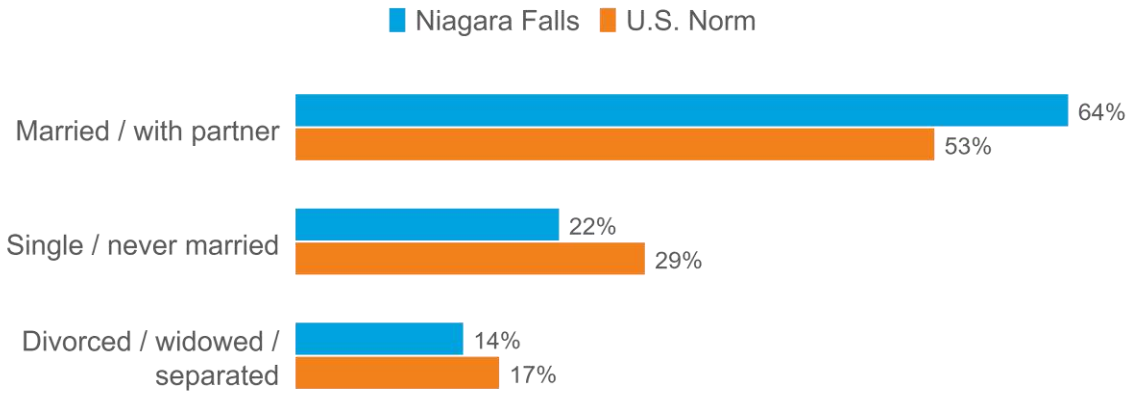
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2024 Overnight Person-Trips

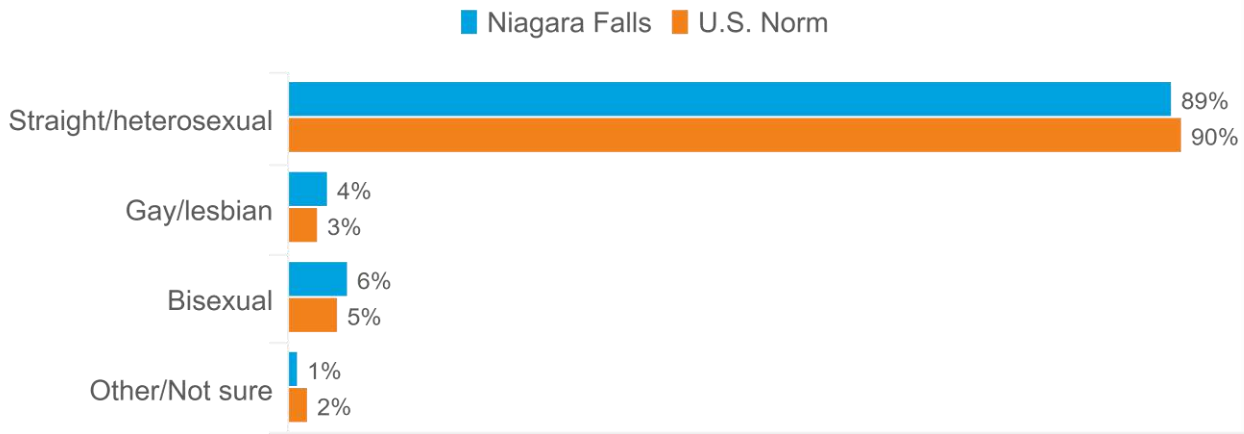
Gender



Marital Status



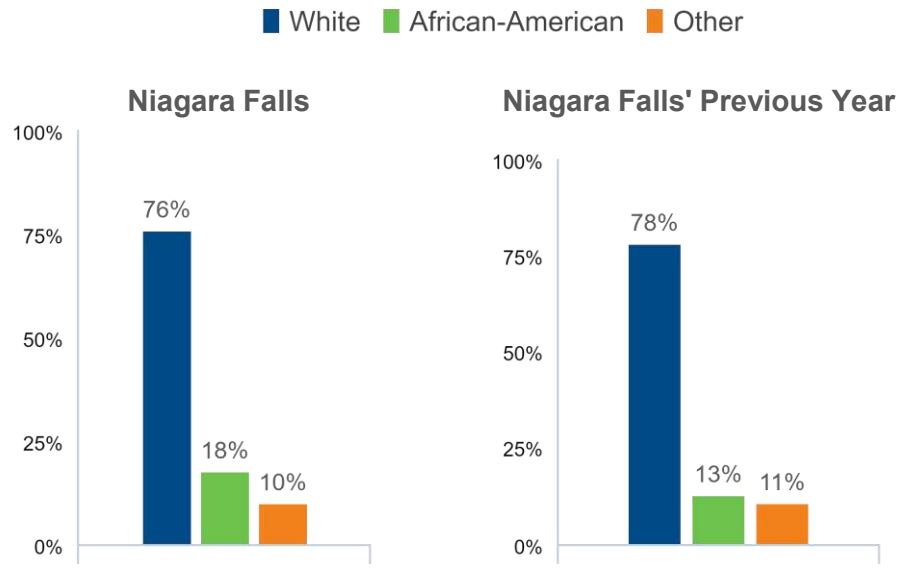
Sexual Orientation



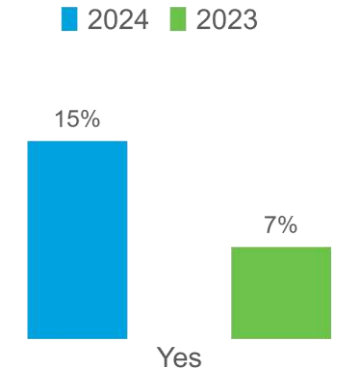
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2024 Overnight Person-Trips

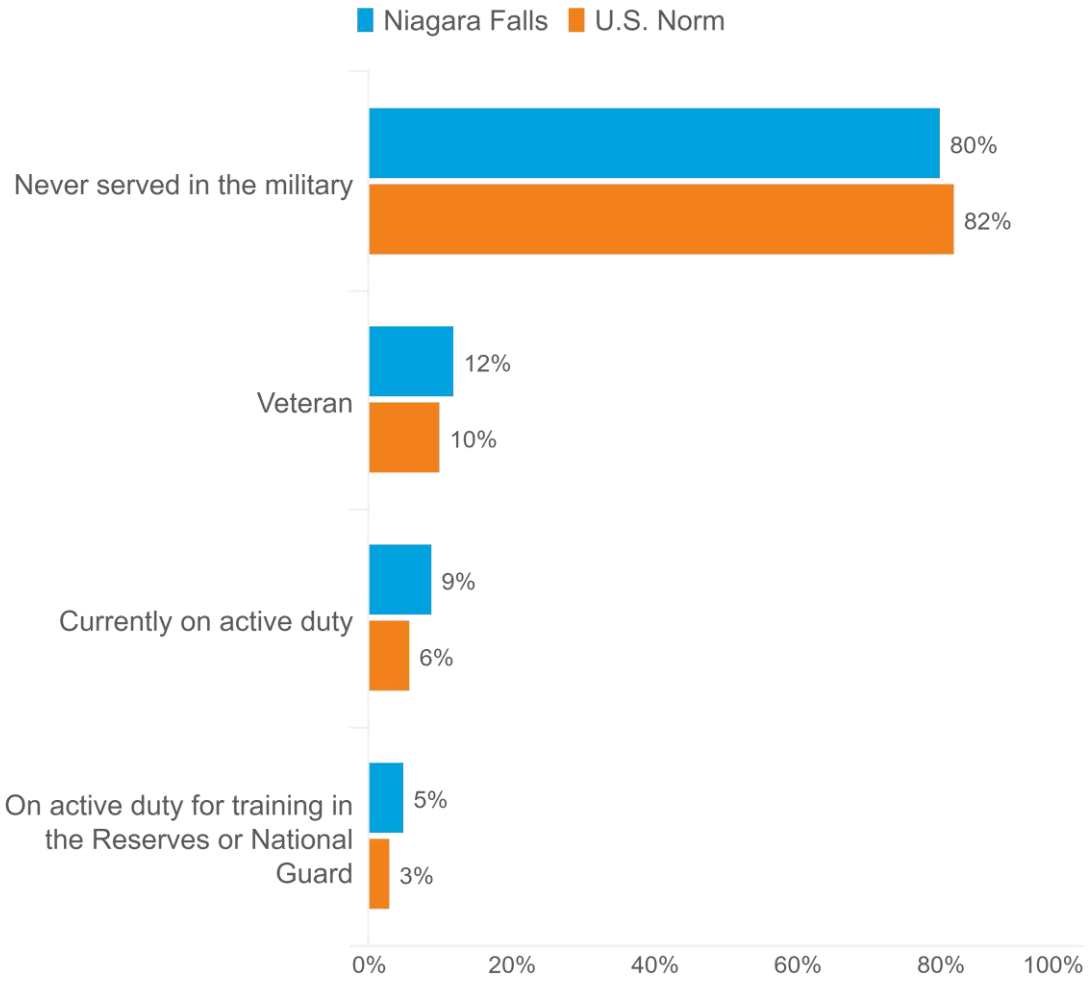
Race



Hispanic Background



Military Status



Demographic Profile of Overnight Niagara Falls Visitors

Base: 2024 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	22%	27%	16%	25%	10%
U.S. Norm	24%	33%	17%	17%	10%

Children in Household

Niagara Falls

No children under 18	46%
Any 13-17	28%
Any 6-12	33%
Any child under 6	17%

Niagara Falls' Previous Year

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

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Travel USA Visitor Profile

Day Visitation

NIAGARA FALLS USA
WHERE ADVENTURE COMES NATURALLY®

2023/2024

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 2023 and 2024 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes and expenditures represent 2024 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.
- Longwoods International's minimum thresholds for reliable sample are 400 for Overnight Trip Reports and 250 for Day Trip Reports. Sample sizes under these thresholds are low sample and marked with caution.

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 2023/2024:

Day Base Size

190 *

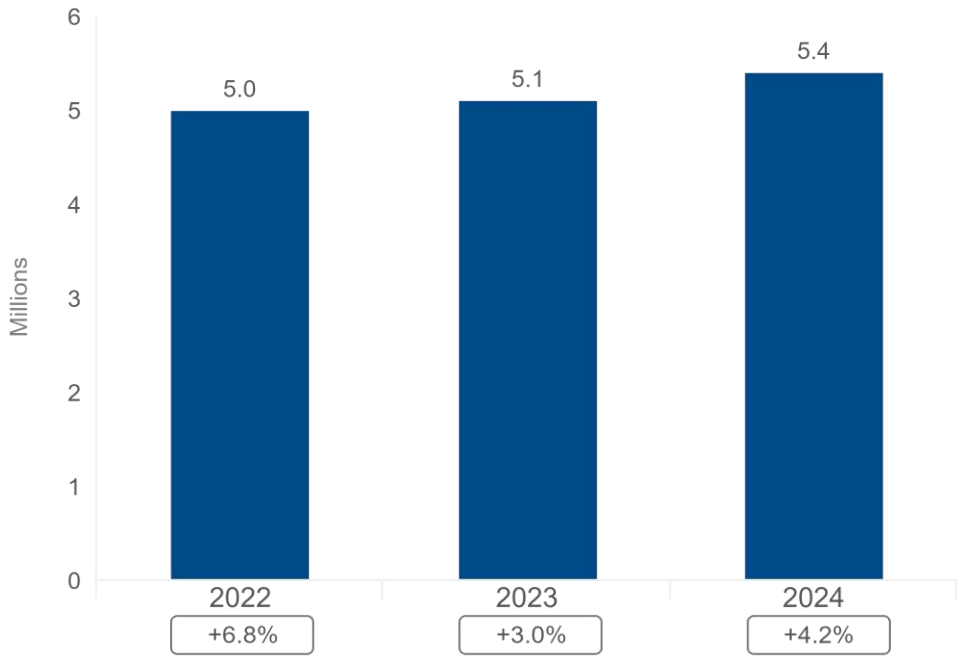
A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

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' Domestic Travel Market

Base: 2024 Day Person-Trips

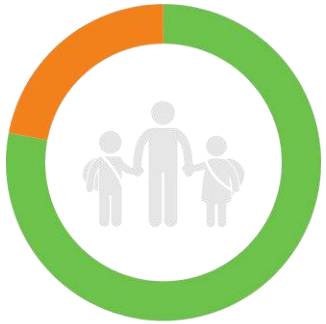
Day Trips to Niagara Falls



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

Total Day Person-Trips

5.4 Million



Adults

78% 4.2 Million

Children

22% 1.2 Million

Niagara Falls' Day Trip Expenditures

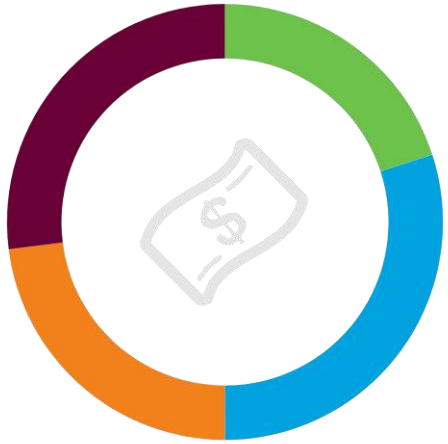
Base: 2024 Day Person-Trips

Domestic Day Expenditures - by Sector

Total Spending

$ 0.468 Billion

+7.5% vs. last year

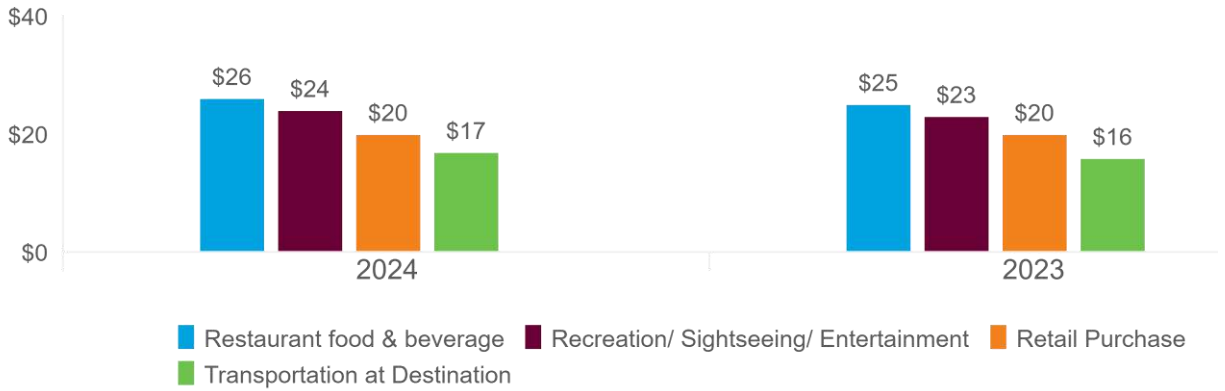


			vs. last year
Transportation at Destination	20%	$92 Million	+8.3%
Restaurant Food & Beverage	30%	$140 Million	+7.0%
Retail Purchase	23%	$110 Million	+7.7%
Recreation/Entertainment	27%	$126 Million	+7.4%

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

Average Per Person Per Trip: $87

Last year: $85



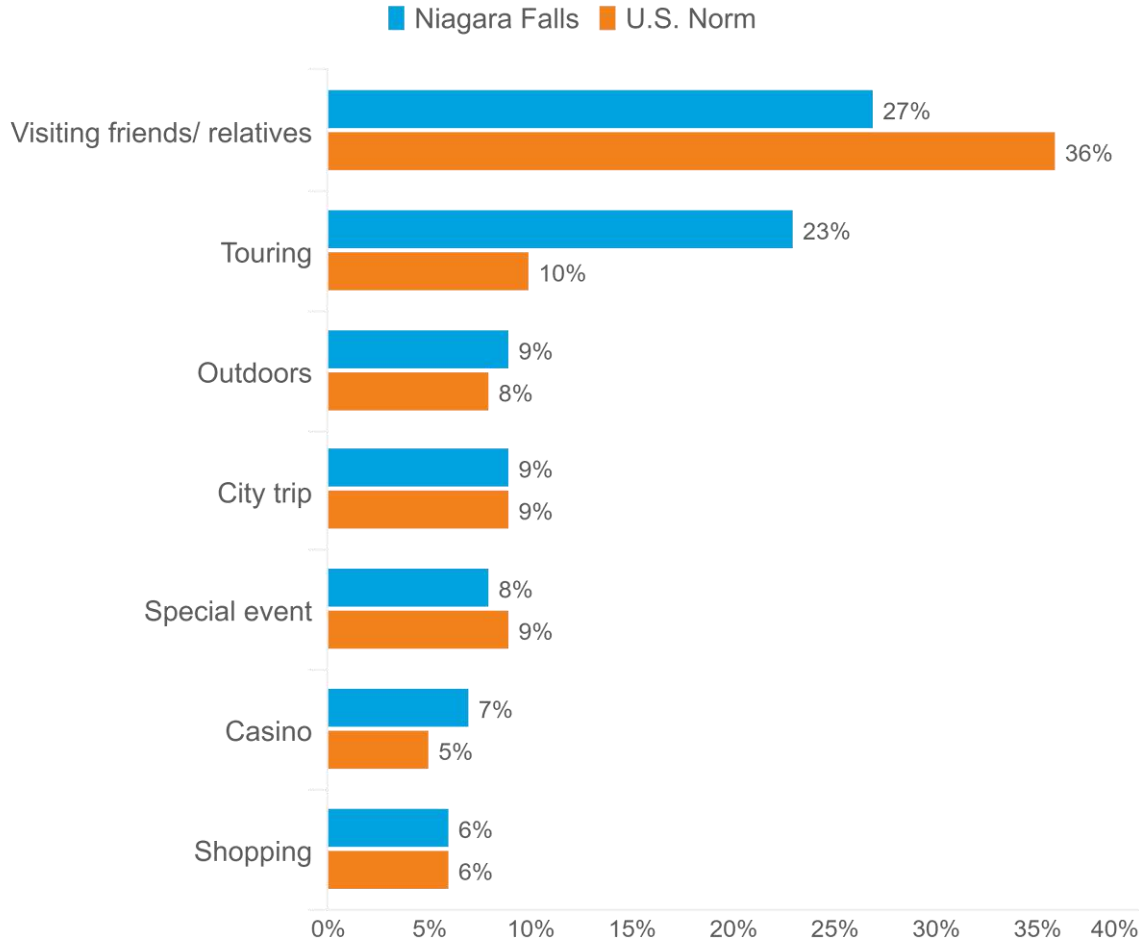
Niagara Falls' Day Trip Characteristics

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Main Purpose of Trip

	2023/2024
Visiting friends/ relatives	27%
Touring	23%
Outdoors	9%
City trip	9%
Special event	8%
Casino	7%
Shopping	6%
Theme park	4%

Main Purpose of Leisure Trip (Top 7)

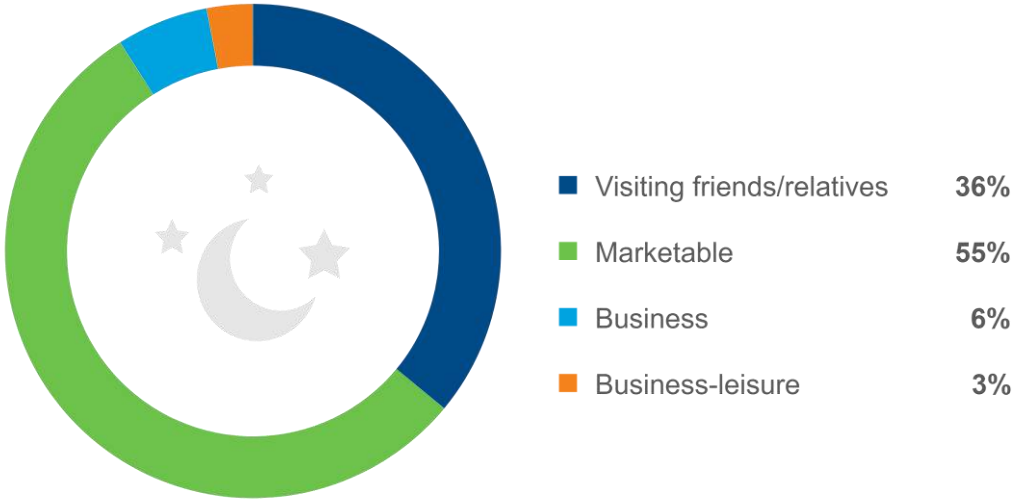


Structure of the U.S. and Niagara Falls Day Travel Market

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Niagara Falls Day Trips

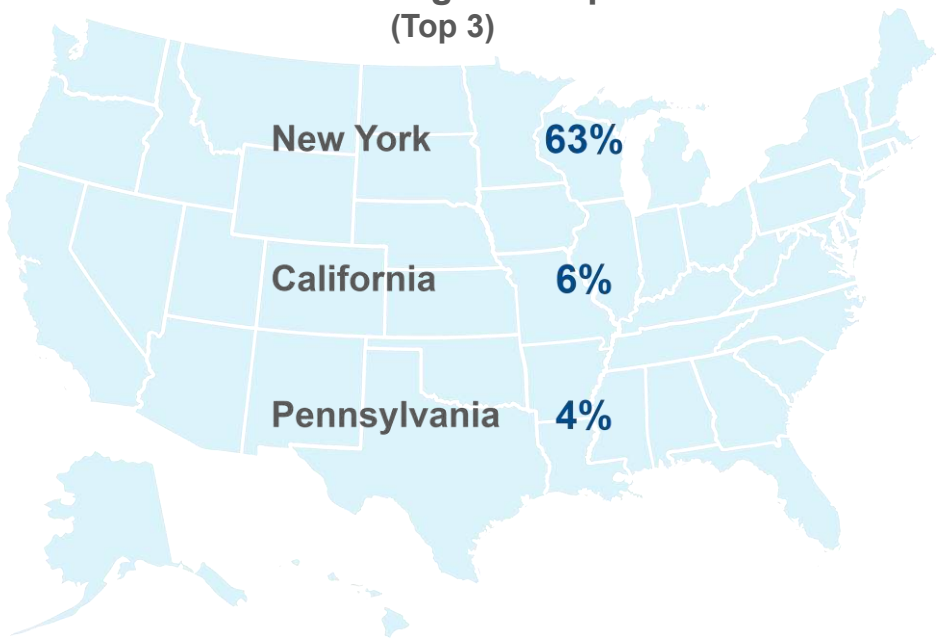
2024 U.S. Day Trips



Niagara Falls' Day Trip Characteristics

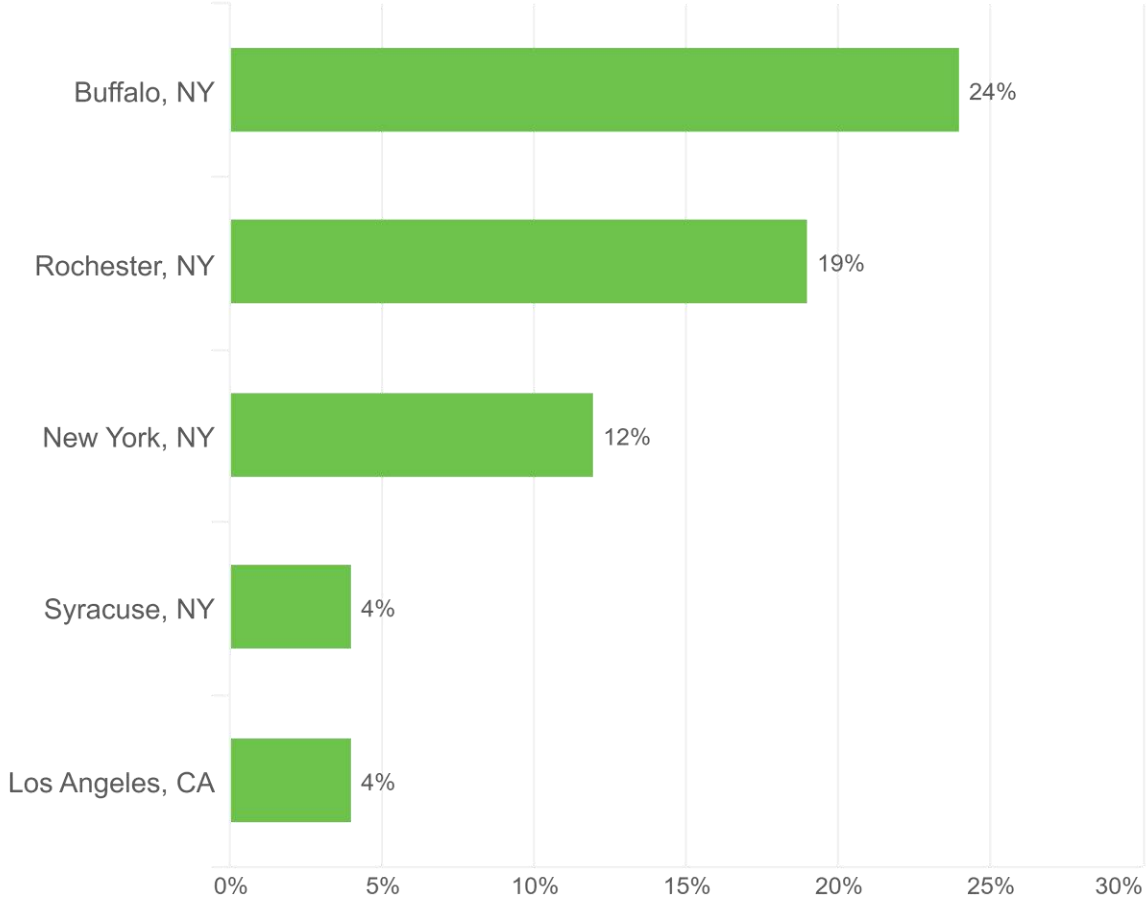
Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

State Origin of Trip
(Top 3)



Season of Trip
Total 2024 Day Person-Trips

DMA Origin of Trip
(Top 5)



Niagara Falls' Day Trip Characteristics

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Size of Travel Party

Adults Children

*Children is based on age, anyone under the age of 18

Niagara Falls

Average number of people

Total **3.0**

U.S. Norm

Average number of people

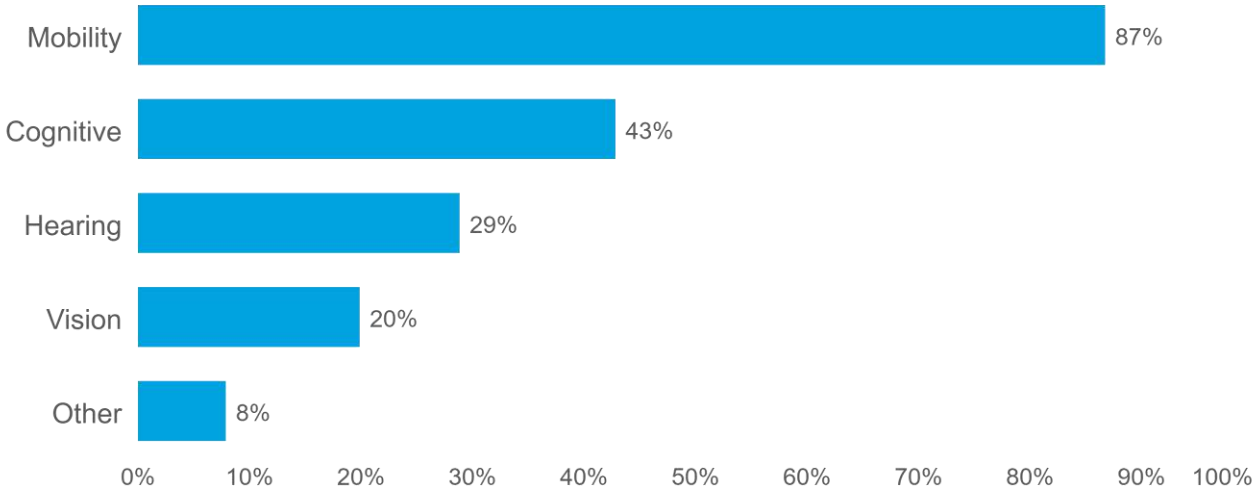
Total **2.5**

17% **of travel parties had a travel party member that required accessibility services**

U.S. Norm: 17%

Disability Categorization

Disability Categorization only asked to those with travel limiting disabilities within travel party



Question added in 2024, data is for 2024 only

Niagara Falls' Day Trip Characteristics

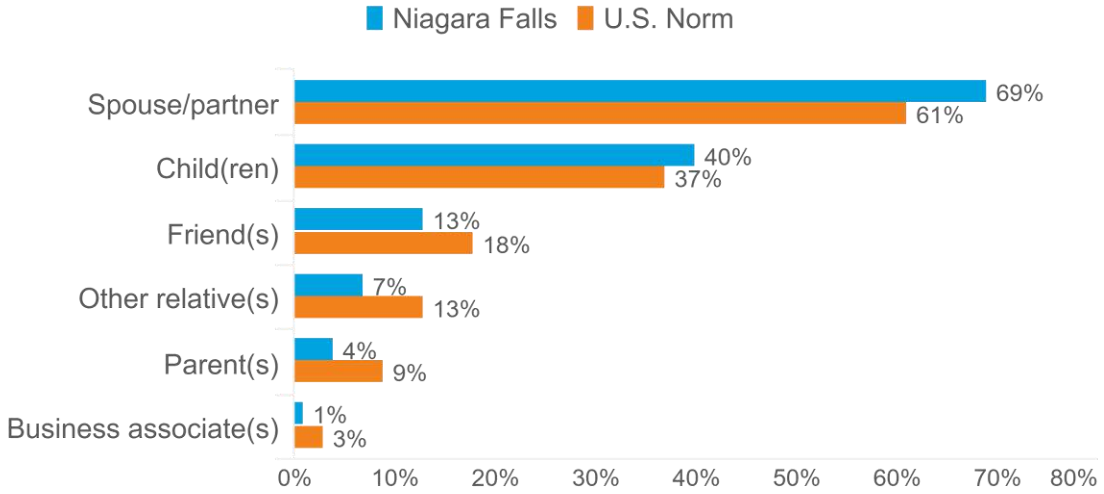
Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

13% **of trips only had one person in the travel party**

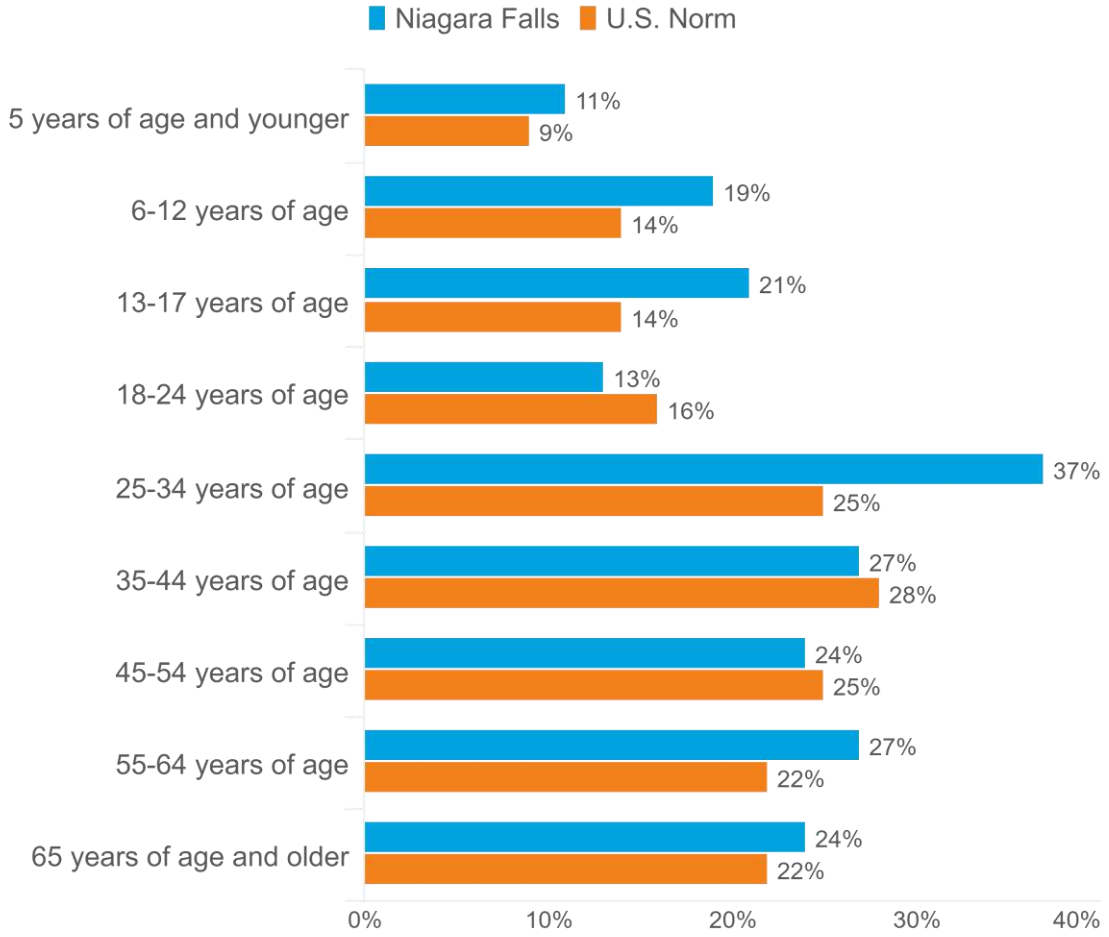
U.S. Norm: 27%

Composition of Immediate Travel Party

that included more than one person
*Child(ren) is based on the relationship to the respondent



Travel Party Age



Niagara Falls: During Trip

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Activity Groupings

Outdoor Activities
49%
U.S. Norm: 35%

Entertainment Activities
76%
U.S. Norm: 52%

Cultural Activities
42%
U.S. Norm: 23%

Sporting Activities
16%
U.S. Norm: 16%

Business Activities
12%
U.S. Norm: 12%

Other Activities
25%
U.S. Norm: 21%

Question updated in 2020

Activities and Experiences
(Top 10)

	Niagara Falls	U.S. Norm
Sightseeing	36%	13%
Shopping	30%	21%
Landmark/historic site	28%	9%
National/state park	25%	5%
Casino	23%	8%
Museum	16%	8%
Nature tours/wildlife viewing/birding	15%	5%
Attending celebration	13%	10%
Art gallery	10%	5%
Swimming	10%	7%

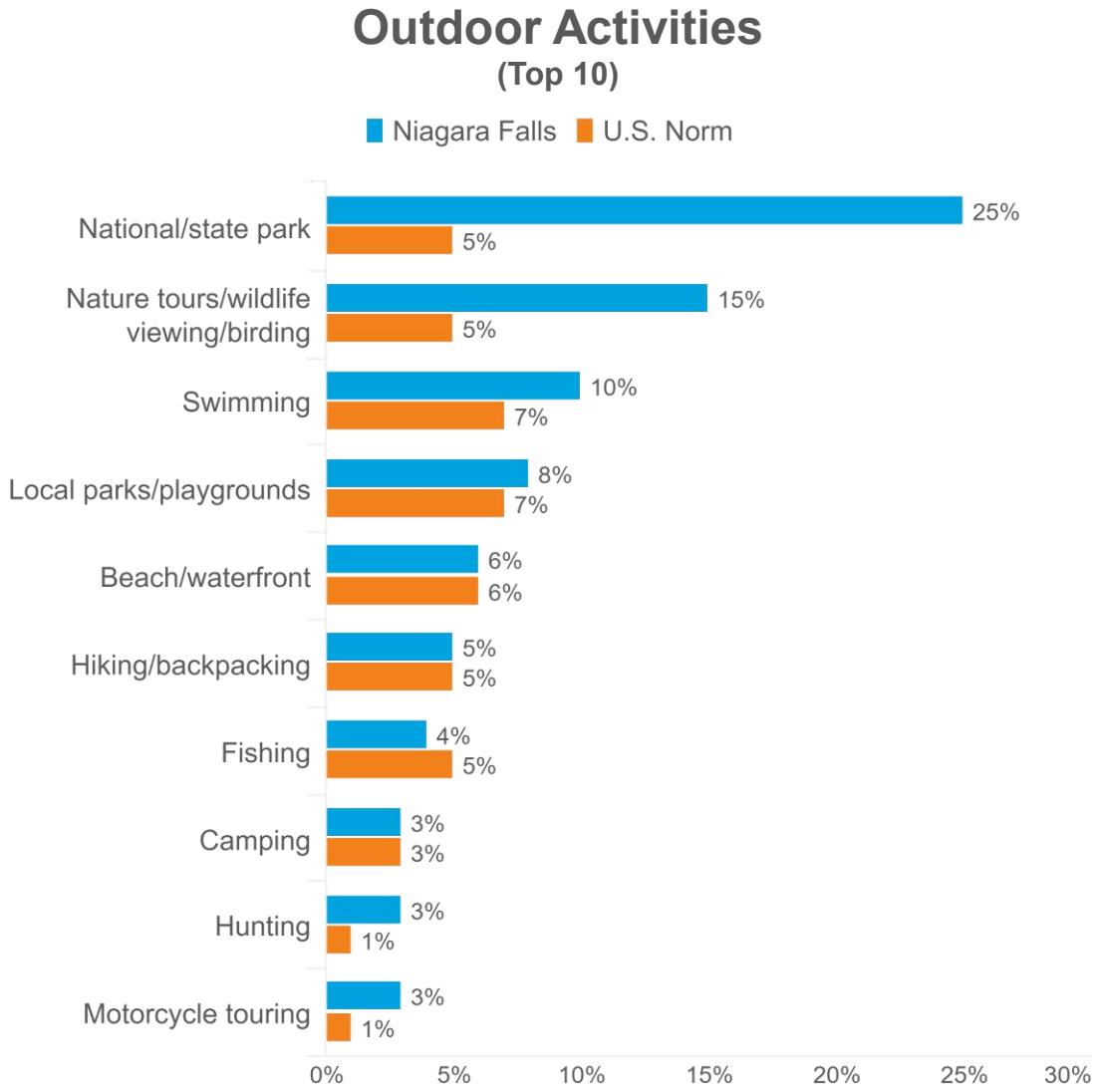
Niagara Falls: During Trip - Outdoor Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Outdoor Activities

Niagara Falls
49%

U.S. Norm
35%



Niagara Falls: During Trip - Entertainment Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

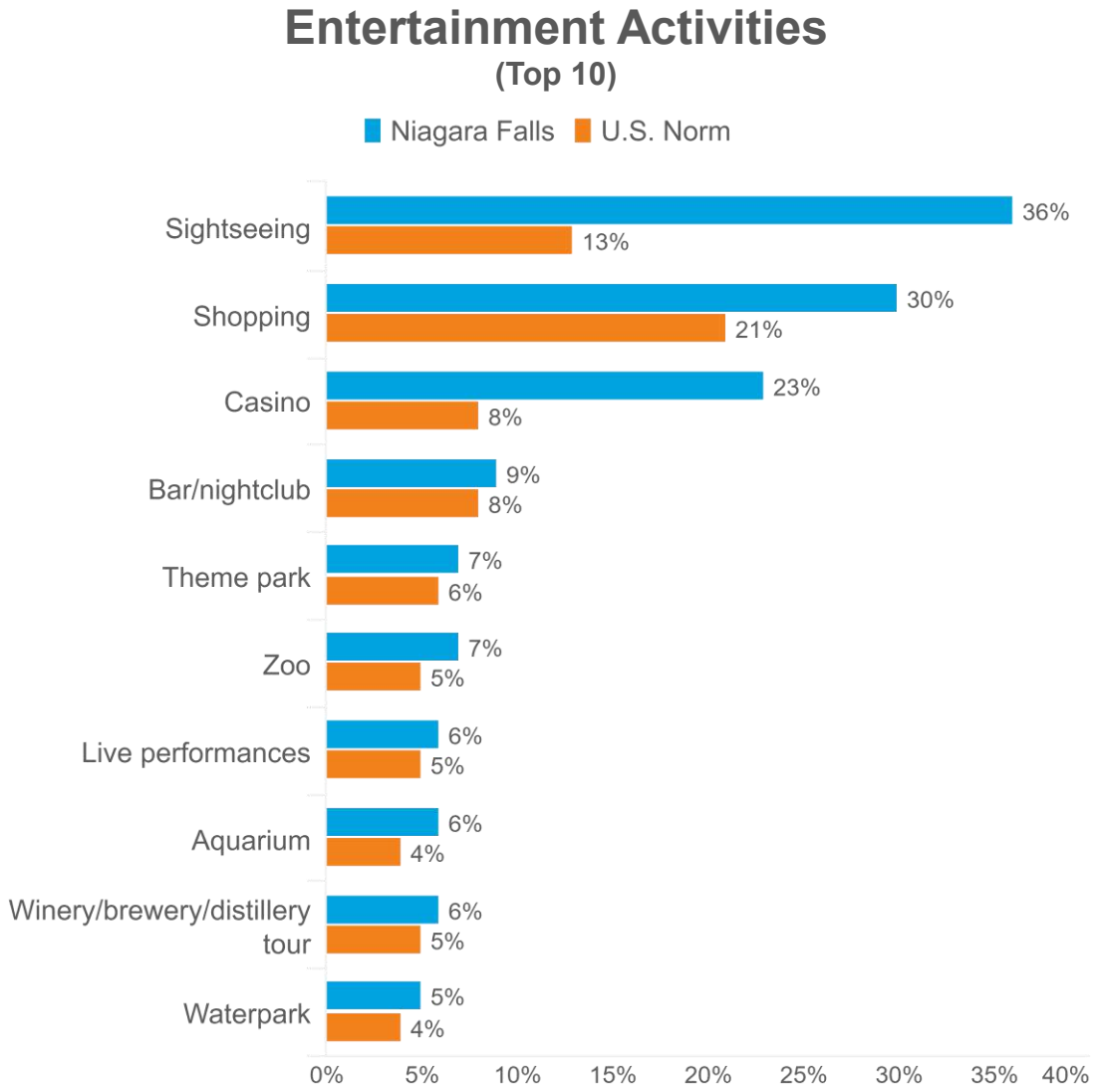
Entertainment Activities

Niagara Falls

76%

U.S. Norm

52%



Niagara Falls: During Trip - Cultural Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

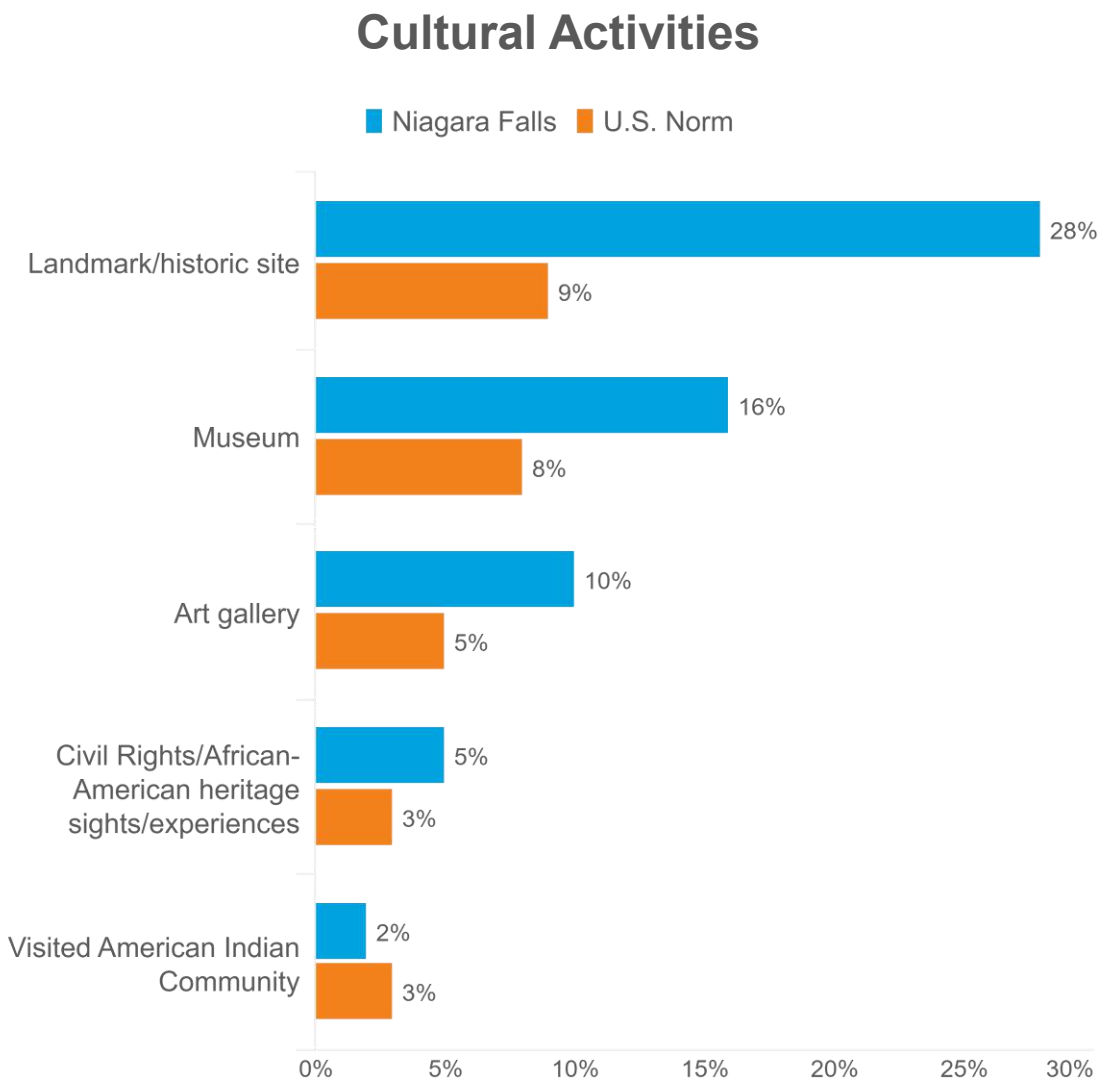
Cultural Activities

Niagara Falls

42%

U.S. Norm

23%

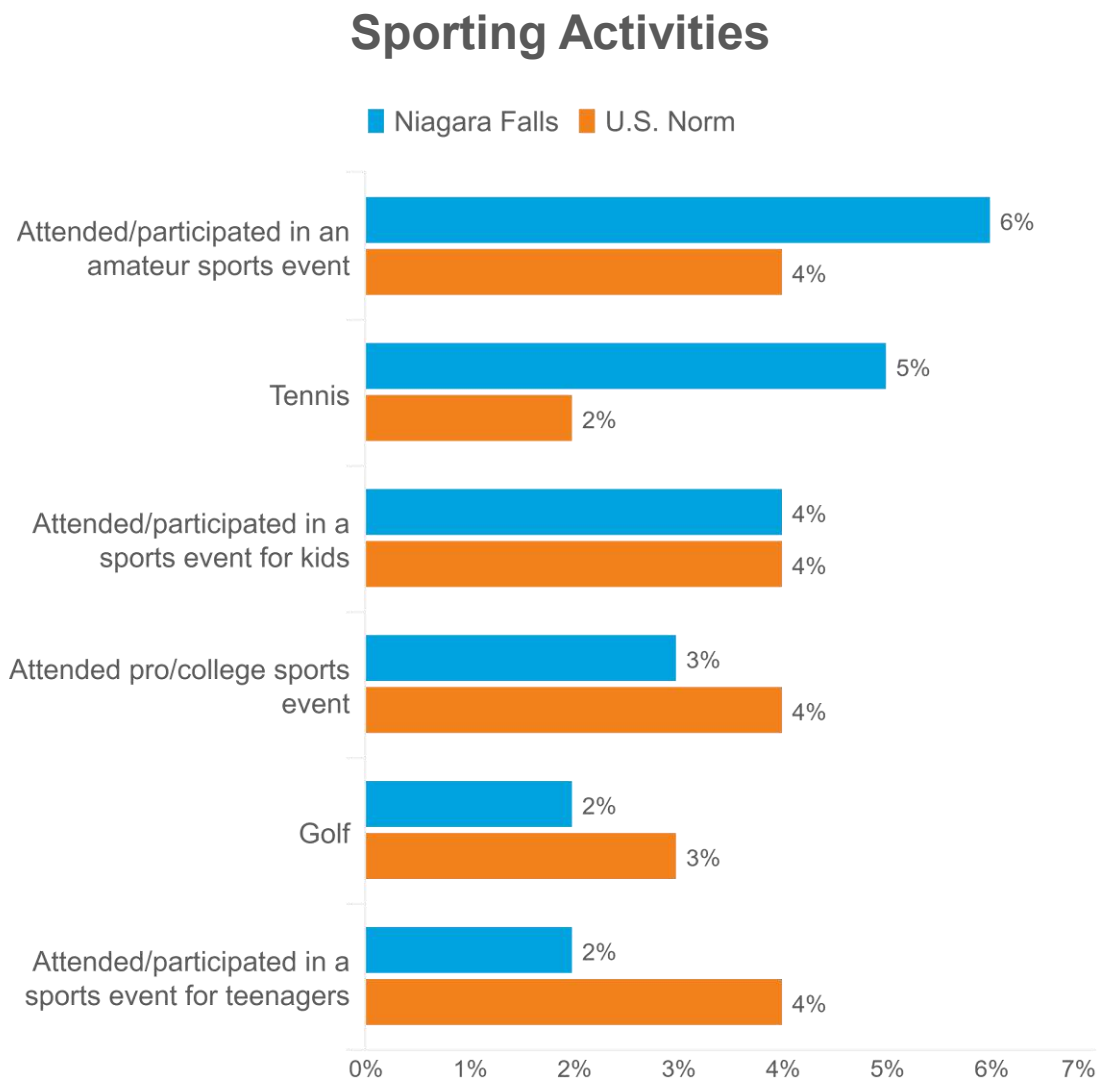


Niagara Falls: During Trip - Sporting Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Sporting Activities

Niagara Falls	U.S. Norm
16%	16%



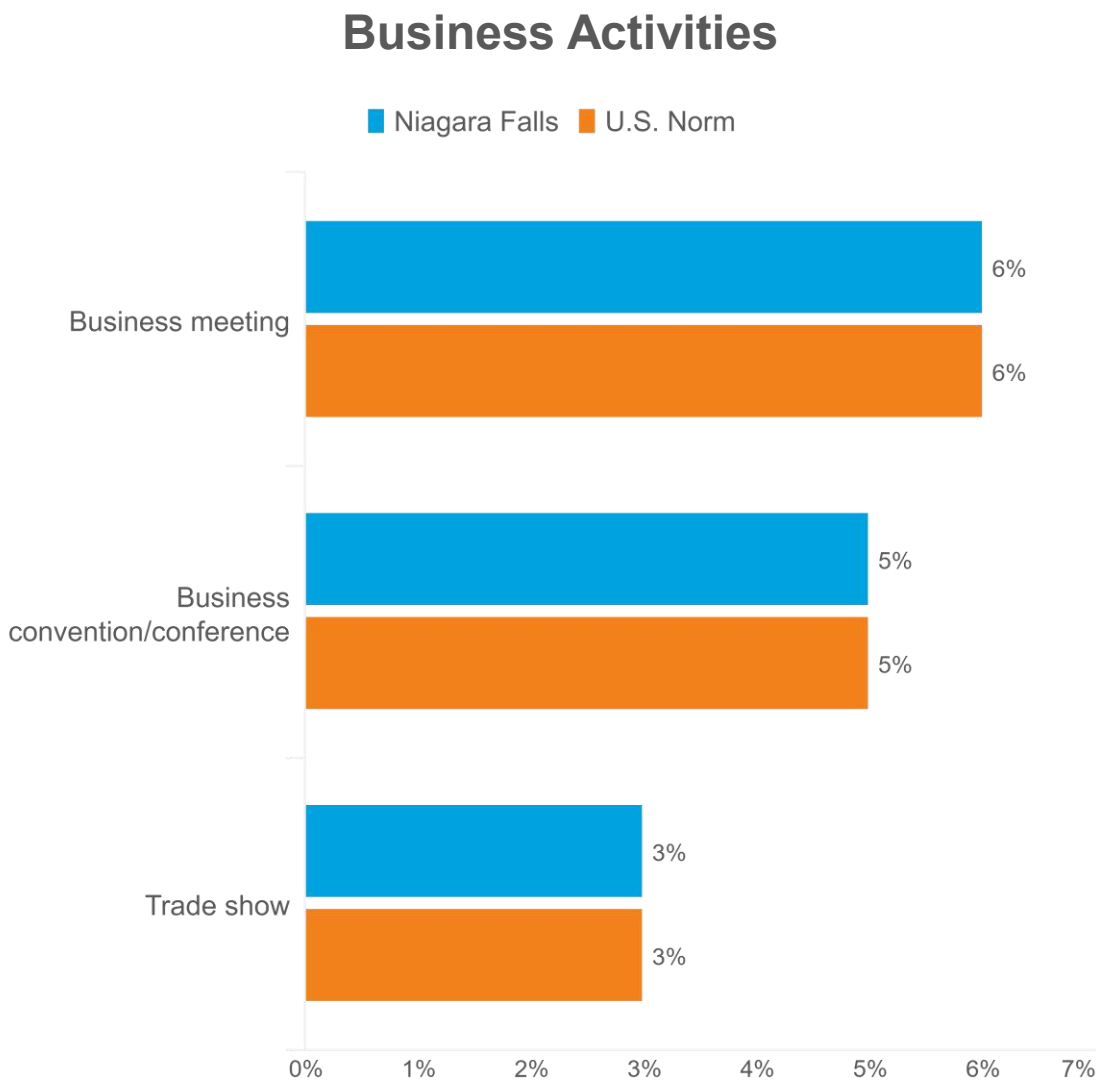
Niagara Falls: During Trip - Business Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Business Activities

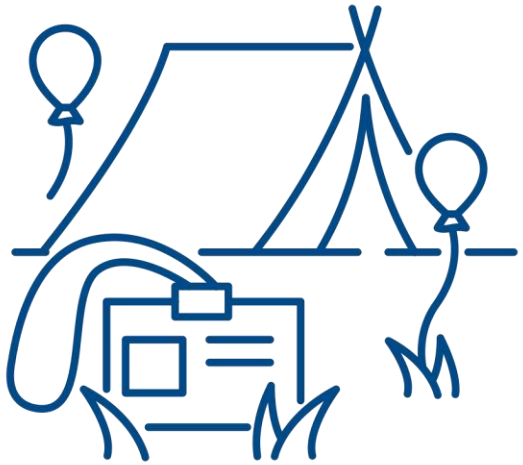
Niagara Falls
12%

U.S. Norm
12%



Niagara Falls: During Trip - Other Activities

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250



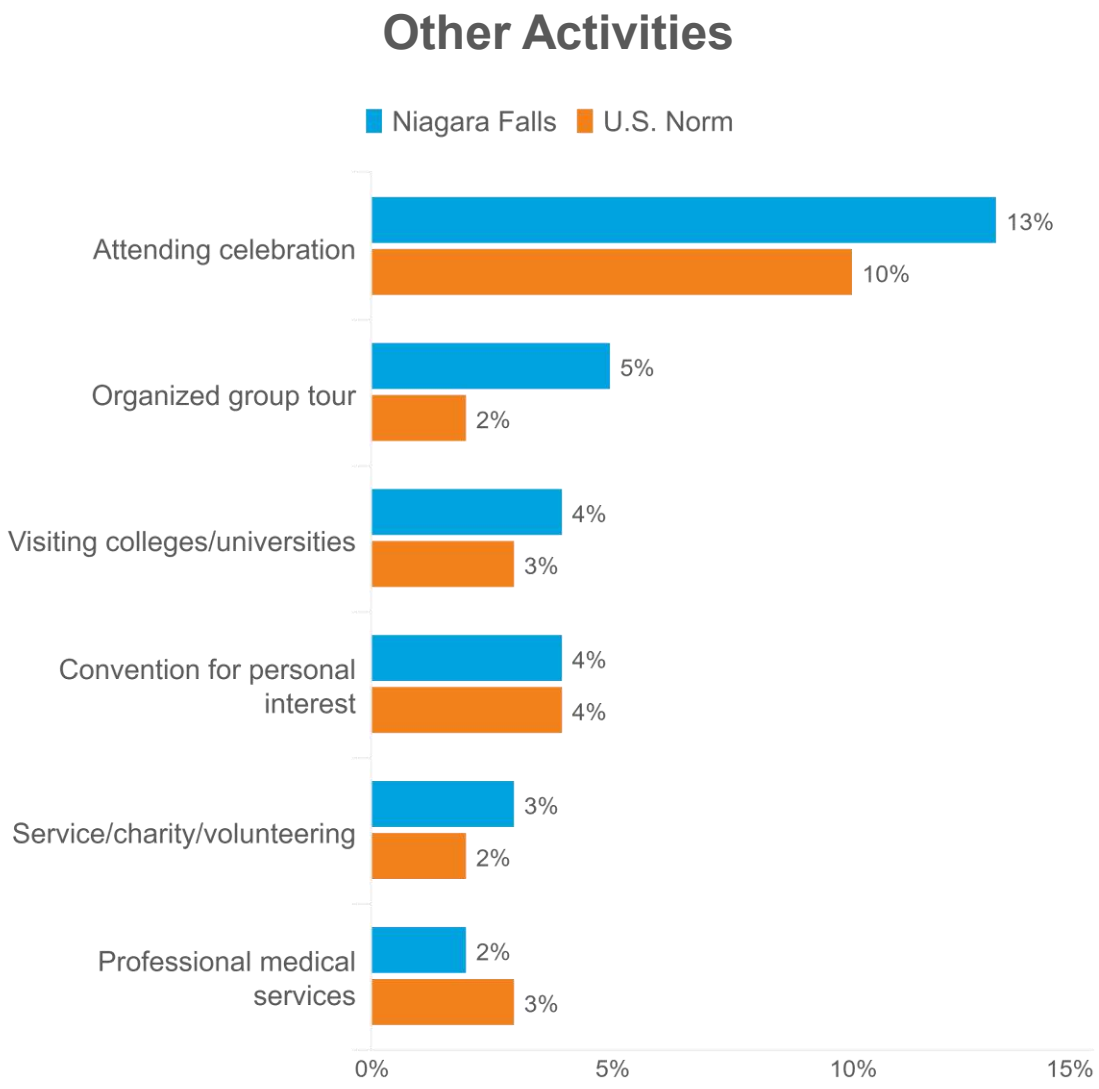
Other Activities

Niagara Falls

25%

U.S. Norm

21%



Niagara Falls: During Trip

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Shopping Types on Trip

that included Shopping

	Niagara Falls	U.S. Norm
Outlet/mall shopping	**53%**	**45%**
Souvenir shopping	**45%**	**25%**
Shopping at locally owned businesses	**41%**	**42%**
Big box stores (Walmart, Costco)	**26%**	**26%**
Convenience/grocery shopping	**23%**	**28%**
Farmers market	**18%**	**15%**
Antiquing	**14%**	**12%**

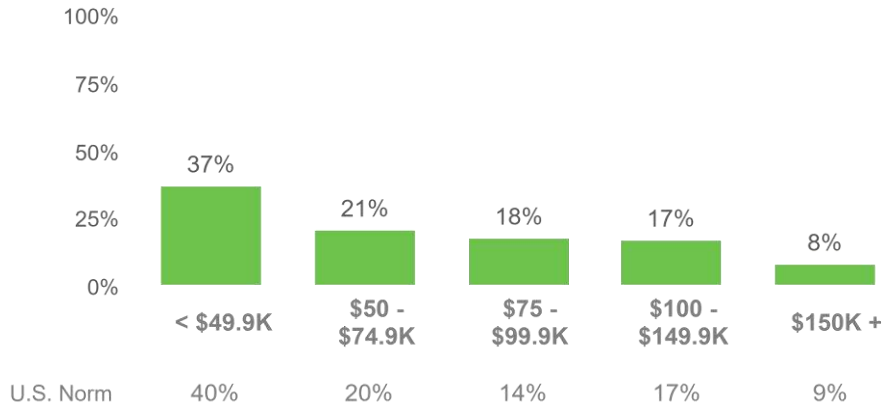
Dining Types on Trip

	Niagara Falls	U.S. Norm
Casual dining	**54%**	**45%**
Fast food	**36%**	**40%**
Unique/local food	**30%**	**23%**
Fine/upscale dining	**18%**	**12%**
Carry-out/food delivery service	**16%**	**15%**
Picnicking	**7%**	**9%**

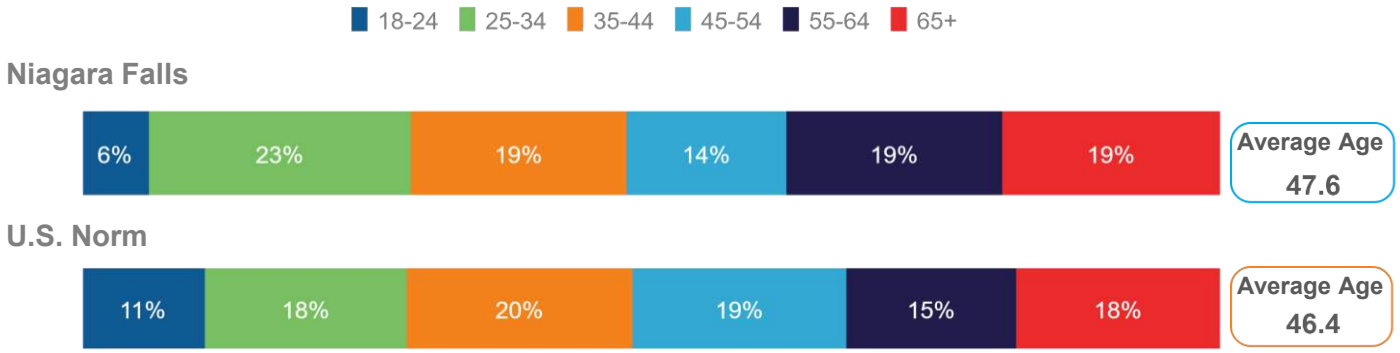
Demographic Profile of Day Niagara Falls Visitors

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

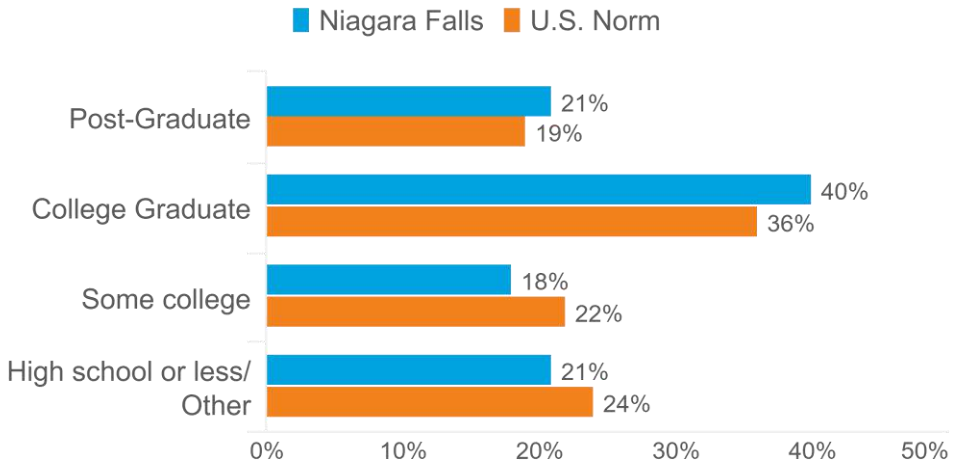
Household Income



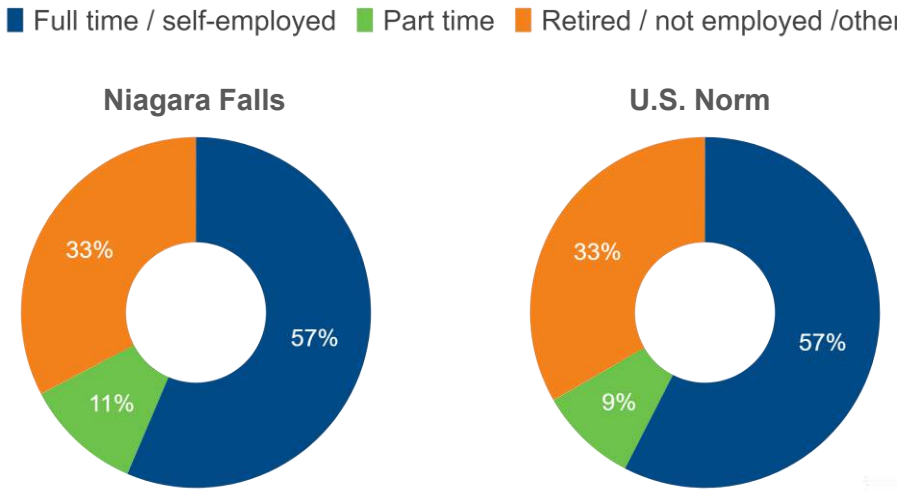
Age



Educational Attainment



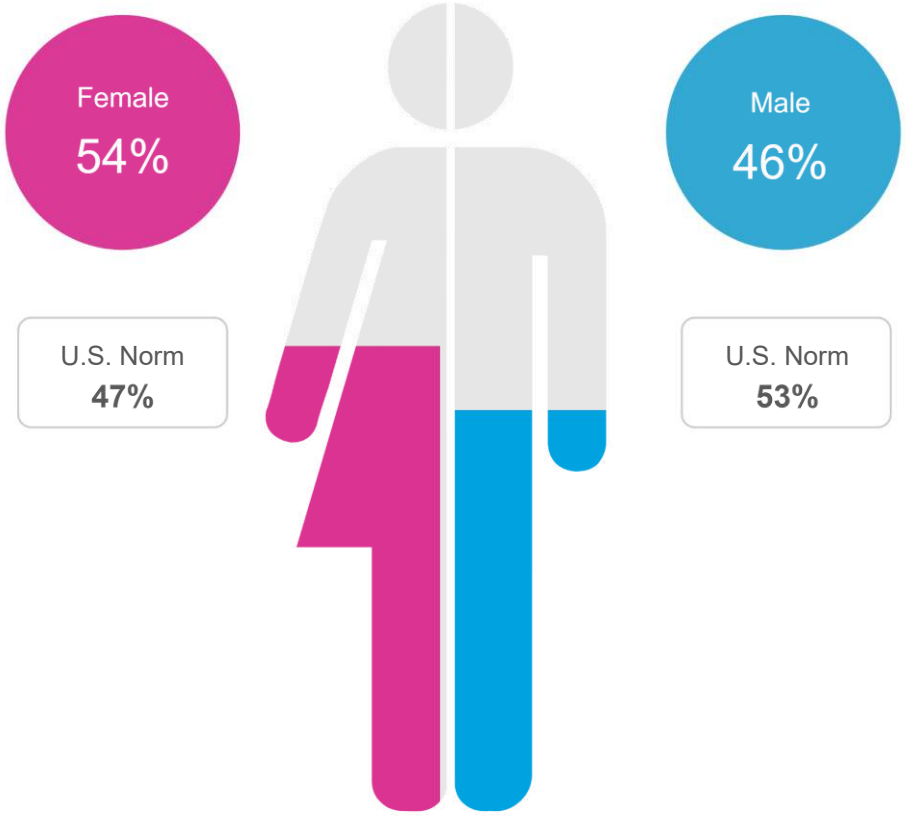
Employment



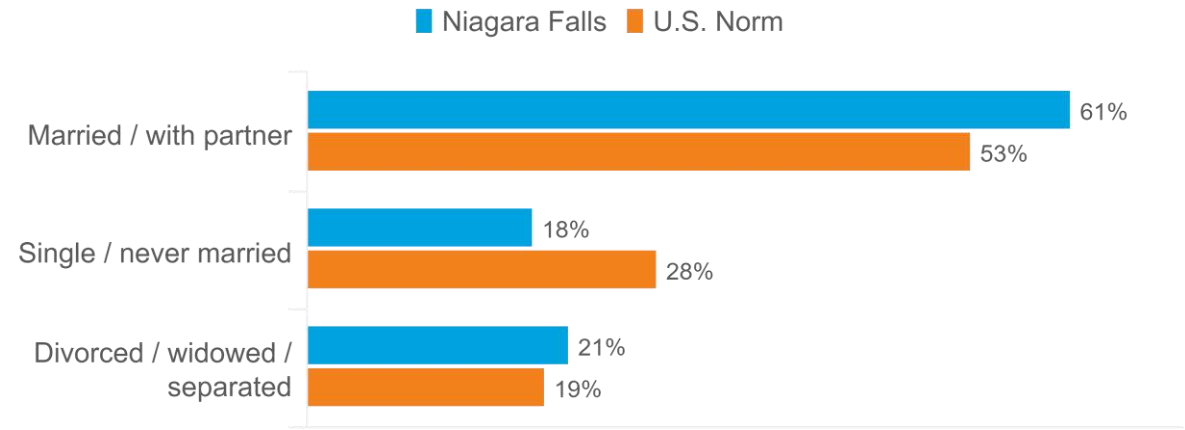
Demographic Profile of Day Niagara Falls Visitors

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

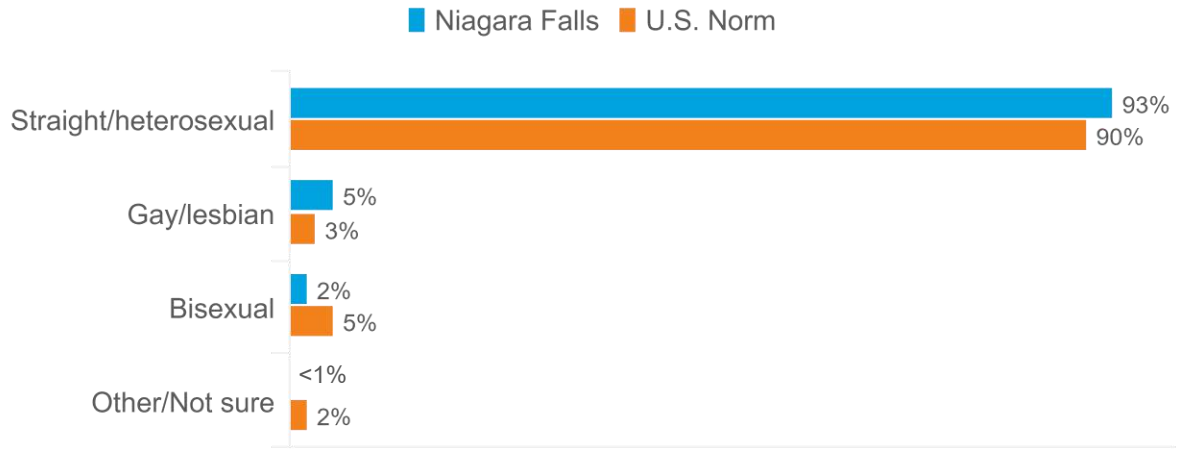
Gender



Marital Status



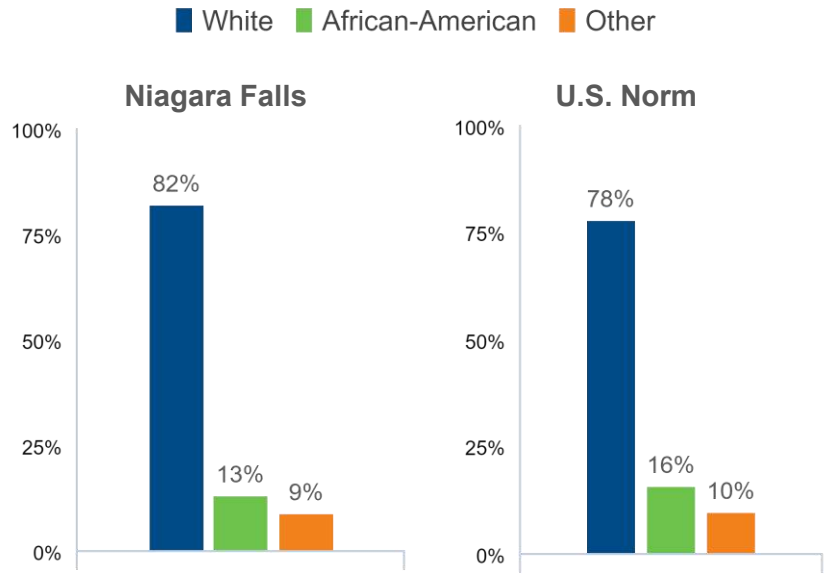
Sexual Orientation



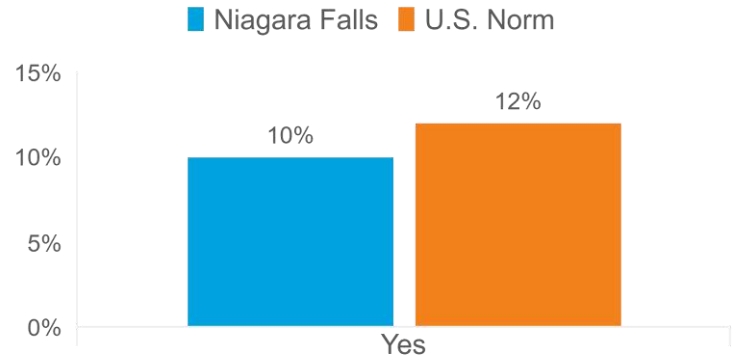
Demographic Profile of Day Niagara Falls Visitors

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

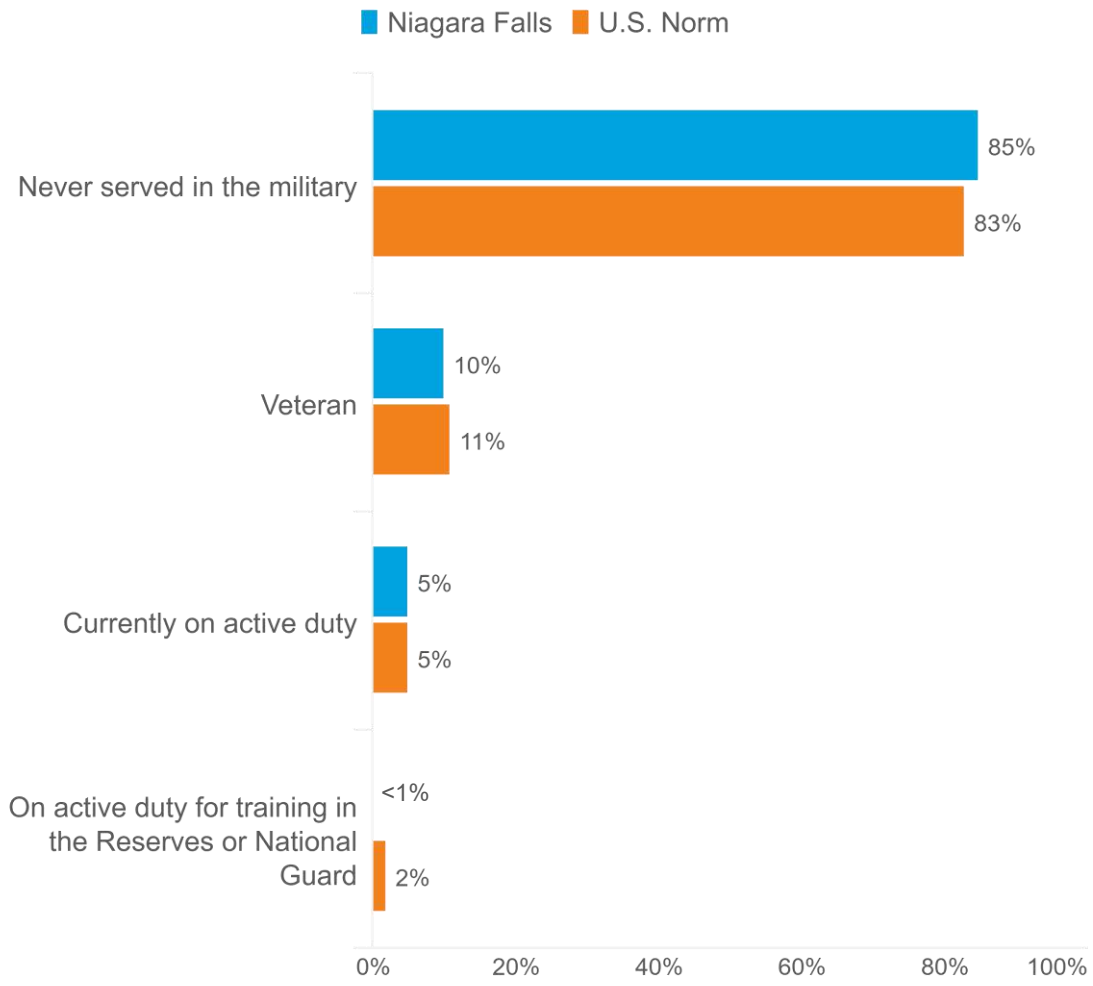
Race



Hispanic Background



Military Status



Question added in 2024, data is for 2024 only

Demographic Profile of Day Niagara Falls Visitors

Base: 2023/2024 Day Person-Trips
*Low Sample - *n* <250

Household Size

	1 member	2 members	3 members	4 members	5+ members
	21%	33%	19%	18%	9%
U.S. Norm	25%	33%	17%	16%	9%

Children in Household

Niagara Falls

No children under 18	50%
Any 13-17	30%
Any 6-12	26%
Any child under 6	16%

U.S. Norm

No children under 18	57%
Any 13-17	22%
Any 6-12	23%
Any child under 6	14%

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