COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2022

Size of the Niagara Falls Travel Market

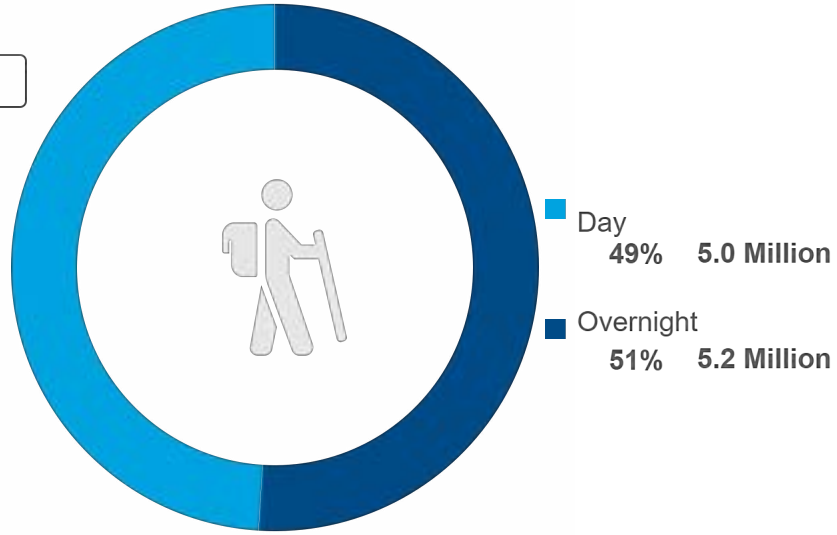
Base: 2022 Person-Trips

Total Size of Niagara Falls 2022 Domestic Travel Market

Total Person-Trips

10.2 Million

+6.6% vs. last year



Day
49% **5.0 Million**

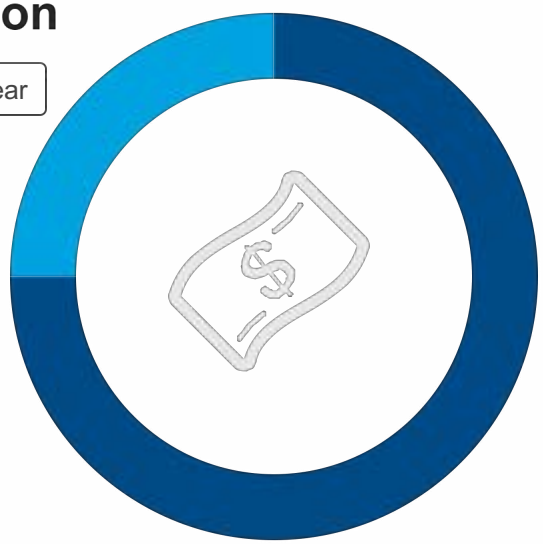
Overnight
51% **5.2 Million**

Total Expenditures for Niagara Falls 2022 Domestic Travel Market

Total Spending

$ 1.6 Billion

+19.1% vs. last year



Day
25% **$0.4 Billion**

Overnight
75% **$1.2 Billion**

COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Overnight Visitation

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2022

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 2022.

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:

Overnight Base Size

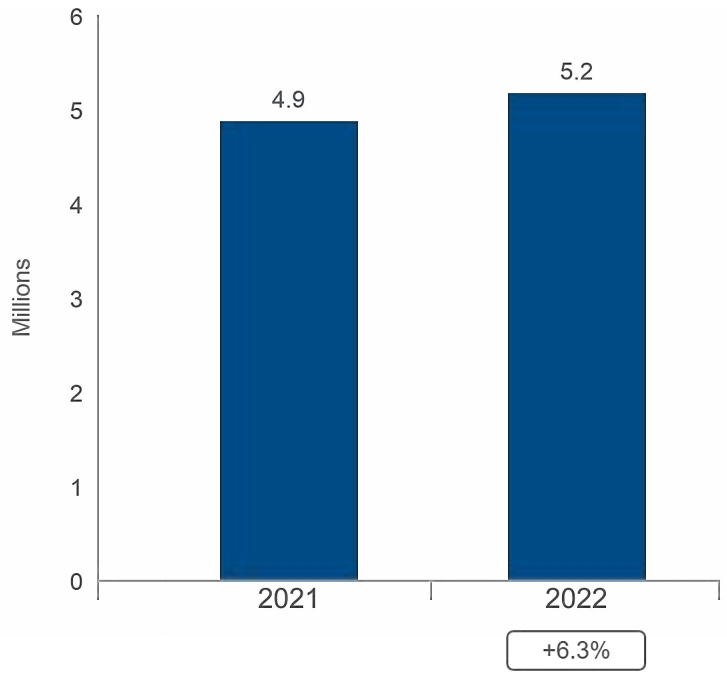
364

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: 2022 Overnight Person-Trips

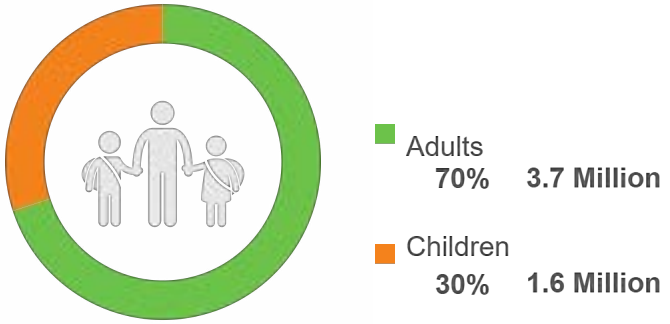
Overnight Trips to Niagara Falls



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

Total Overnight Person-Trips

5.2 Million



Past Visitation to Niagara Falls

70% of overnight travelers to Niagara Falls are repeat visitors

36% of overnight travelers to Niagara Falls had visited before in the past 12 months

Niagara Falls' Overnight Trip Expenditures

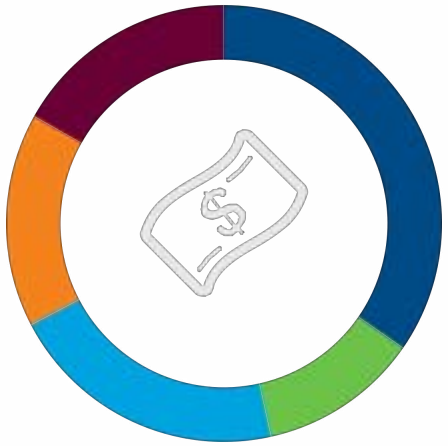
Base: 2022 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

$ 1.219 Billion

+18.3% vs. last year

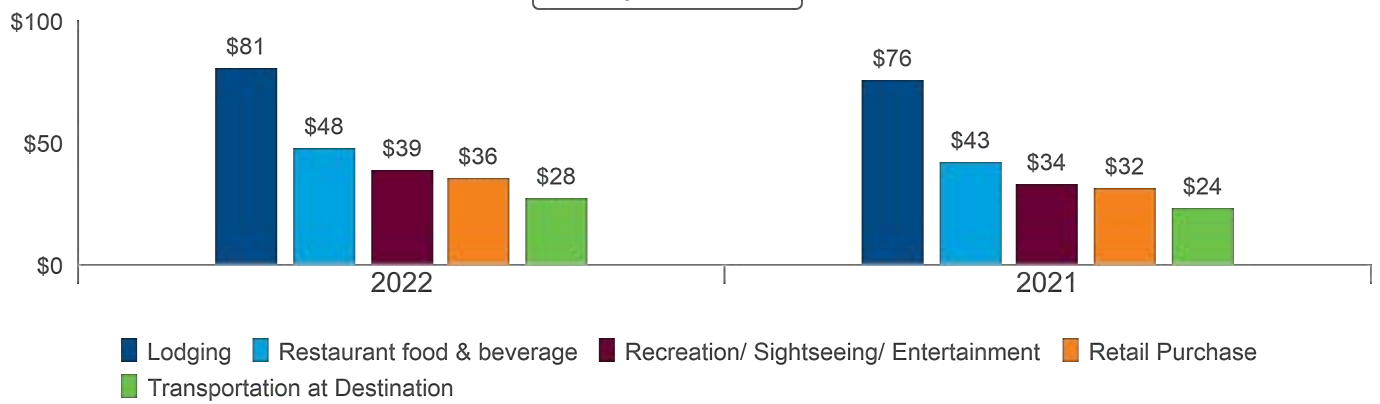


			vs. last year
Lodging	35%	$424 Million	+13.5%
Transportation at Destination	12%	$148 Million	+24.9%
Restaurant Food & Beverage	21%	$251 Million	+18.7%
Retail Purchase	16%	$191 Million	+19.7%
Recreation/Entertainment	17%	$205 Million	+22.6%

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

Average Per Person Per Trip: $232

Last year: $209



Average Per Person Per Trip:

Leisure $234

Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Main Purpose of Trip

37%
Visiting friends/ relatives

20%
Touring

12%
City trip

6%
Special event

5%
Casino

5%
Outdoors

4%
Theme park

2%
Resort

3%
Conference/ Convention

2%
Other business trip

4%
Business-Leisure

Main Purpose of Leisure Trip

	2022	2021
Visiting friends/ relatives	37%	33%
Touring	20%	20%
City trip	12%	9%
Special event	6%	3%
Casino	5%	5%
Outdoors	5%	10%
Theme park	4%	4%
Resort	2%	2%

Structure of the Niagara Falls Overnight Travel Market

Base: 2022 Overnight Person-Trips

2022 Niagara Falls Overnight Trips

Visiting friends/relatives	37%
Marketable	55%
Business	5%
Business-leisure	4%

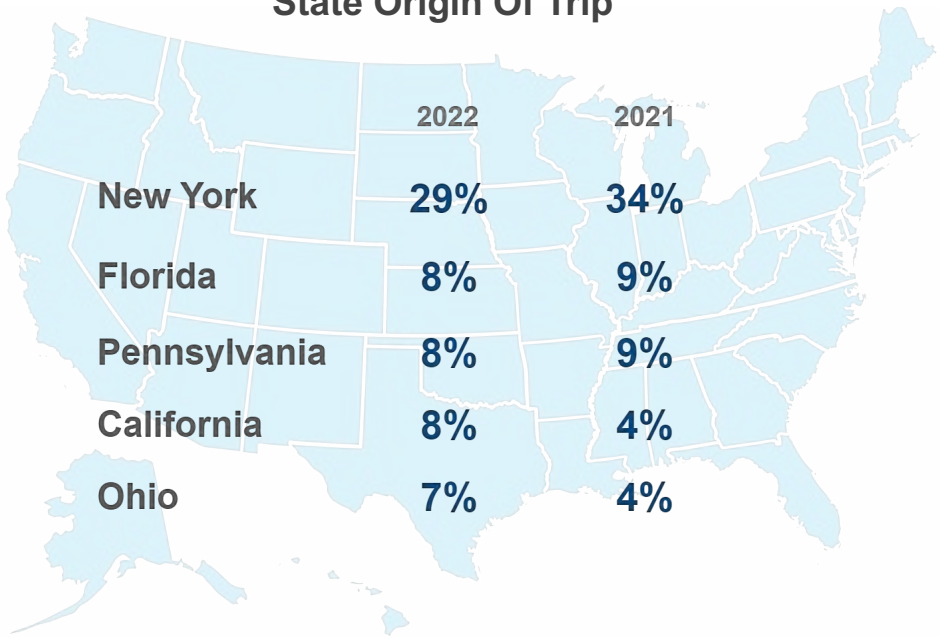
Last Year's Niagara Falls Overnight Trips

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

Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

State Origin Of Trip



	2022	2021
New York	29%	34%
Florida	8%	9%
Pennsylvania	8%	9%
California	8%	4%
Ohio	7%	4%

Season of Trip

Total Overnight Person-Trips

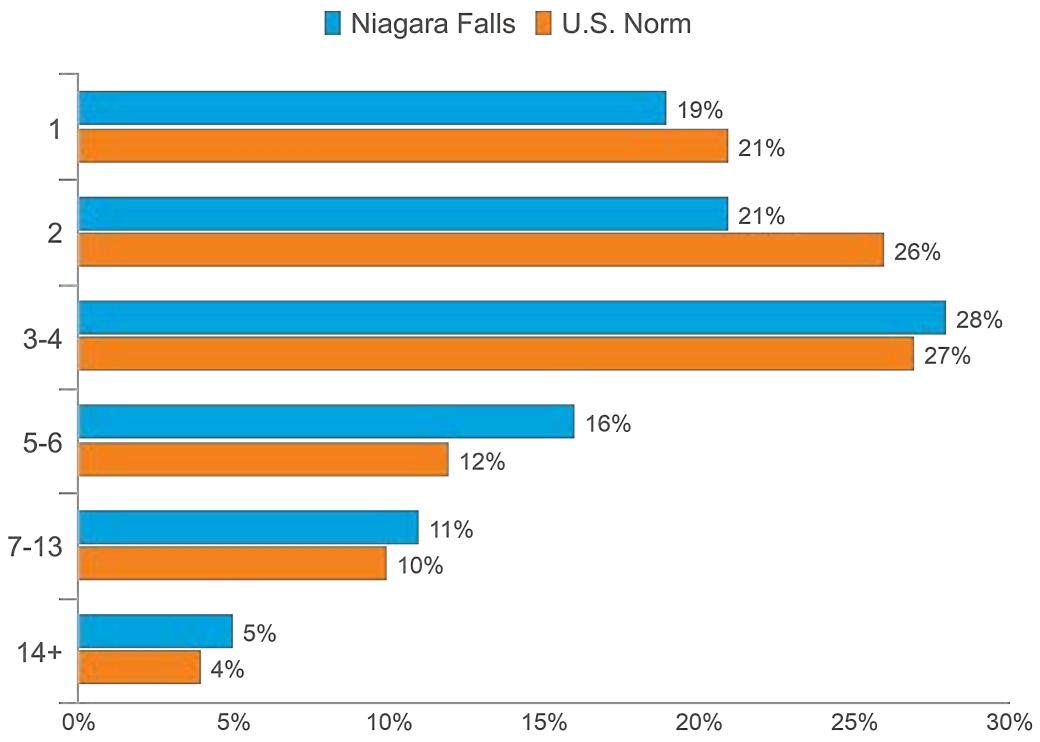
DMA Origin Of Trip

	2022	2021
New York, NY	17%	14%
Buffalo, NY	6%	10%
Los Angeles, CA	5%	3%
Orlando-Daytona Beach-Melbrn, FL	4%	3%
Rochester, NY	4%	2%
Syracuse, NY	4%	6%
Cleveland, OH	4%	2%
Chicago, IL	3%	1%
Erie, PA	3%	1%

Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

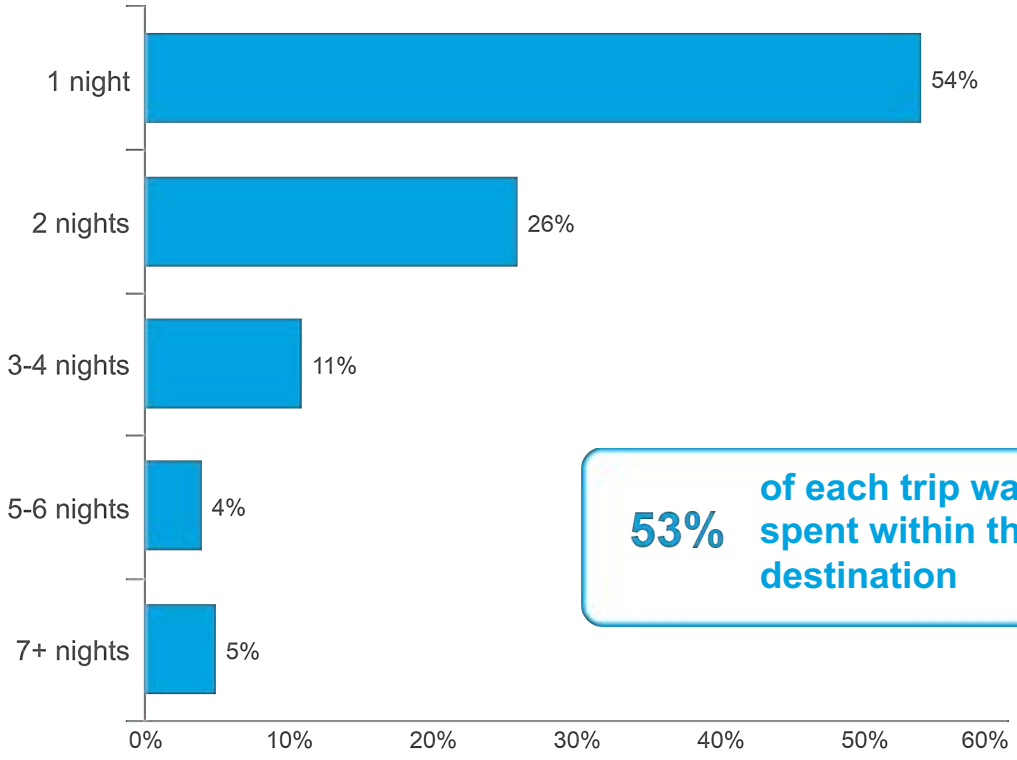
Total Nights Away on Trip



Niagara Falls
4.3
Average Nights

U.S. Norm
3.9
Average Nights

Nights Spent in Niagara Falls



53% of each trip was spent within the destination

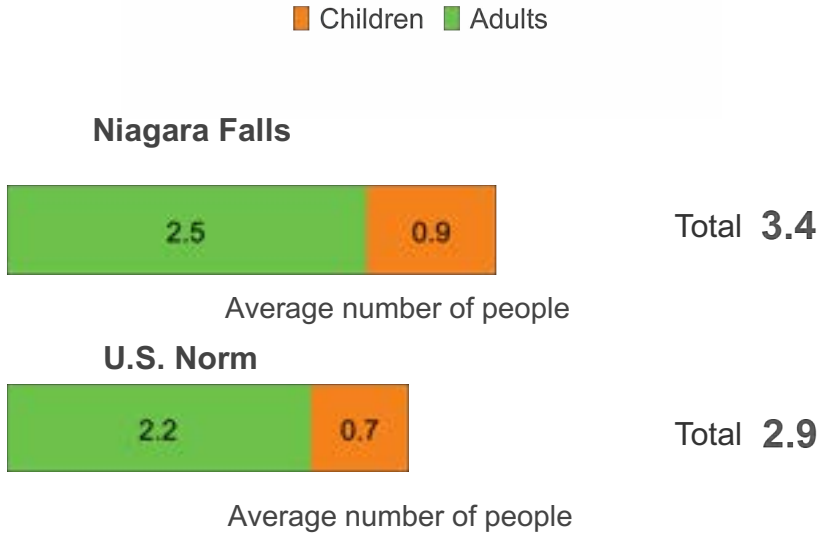
Average number of nights
2.3

Average last year
2.3

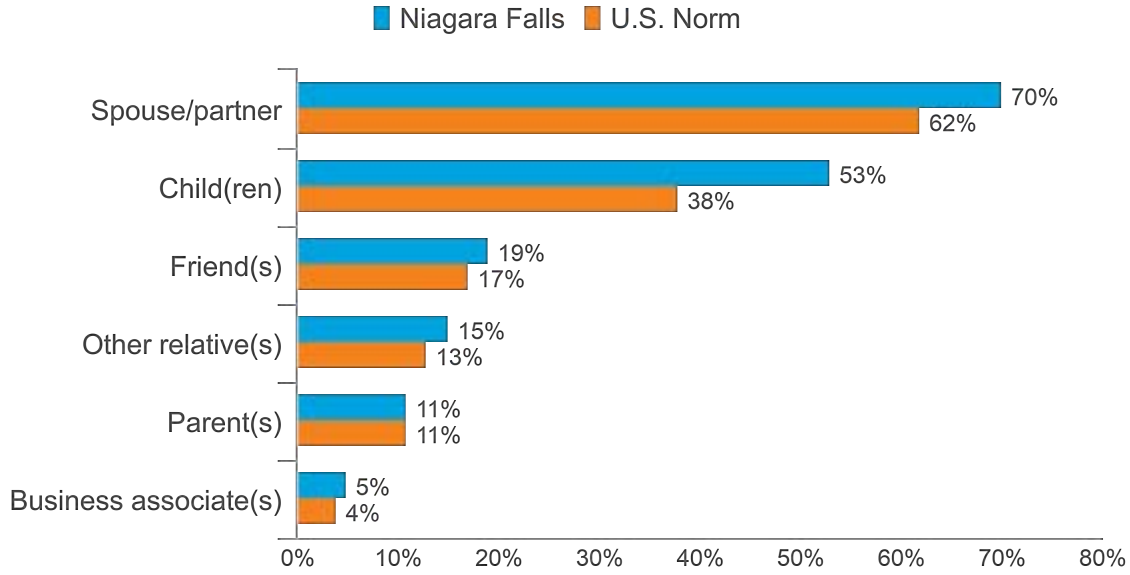
Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Size of Travel Party

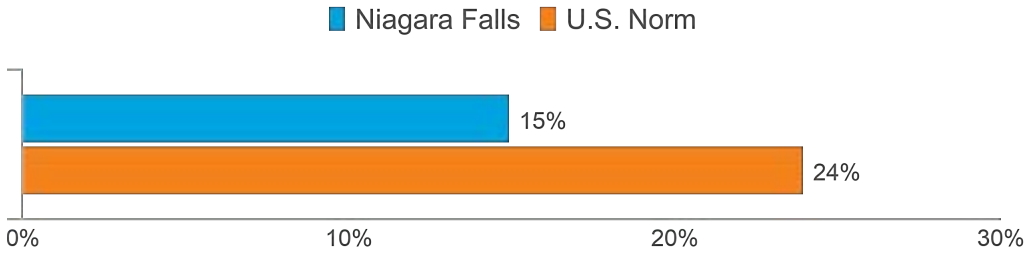


Composition of Immediate Travel Party

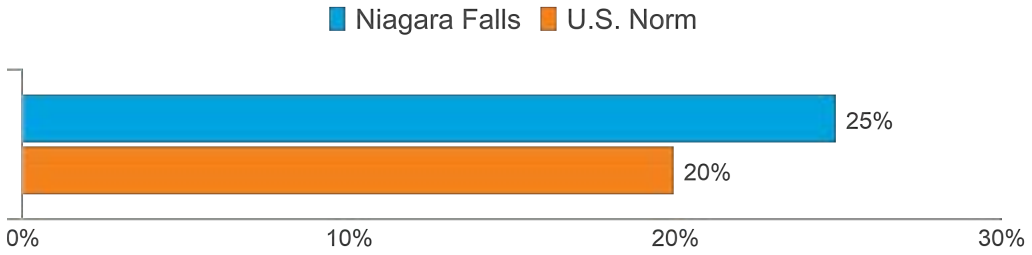


Base: 2022 Overnight Person-Trips that included more than one person

Percent Who Traveled Alone



Percent Who Had Travel Party Member with Disabilities



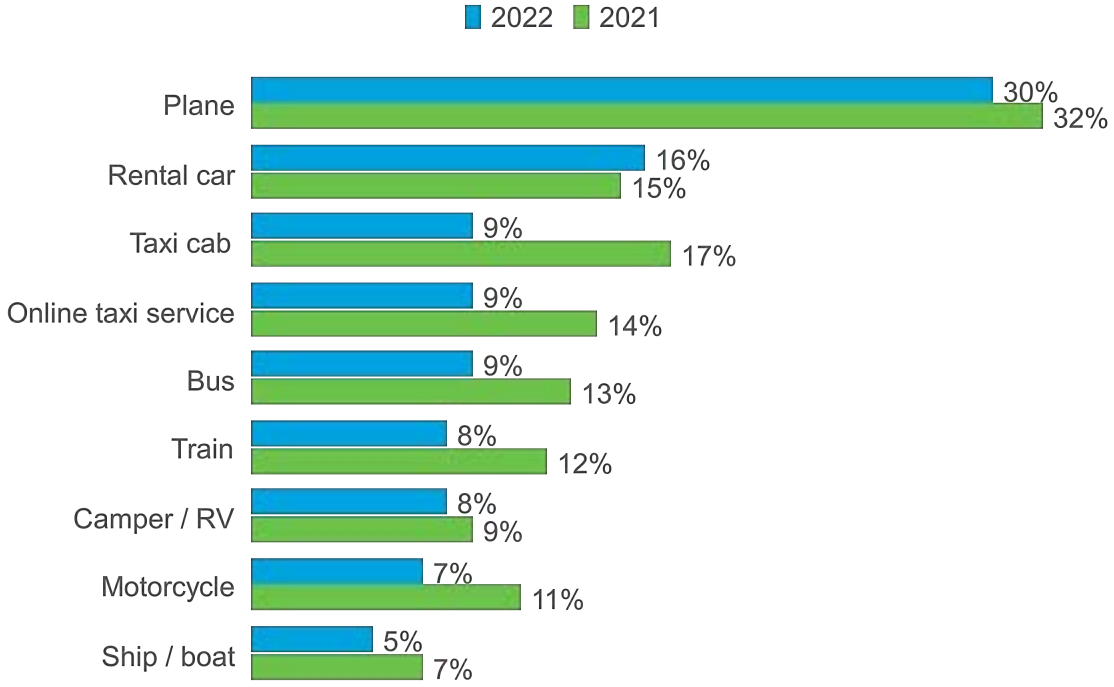
Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Transportation Used to get to Destination

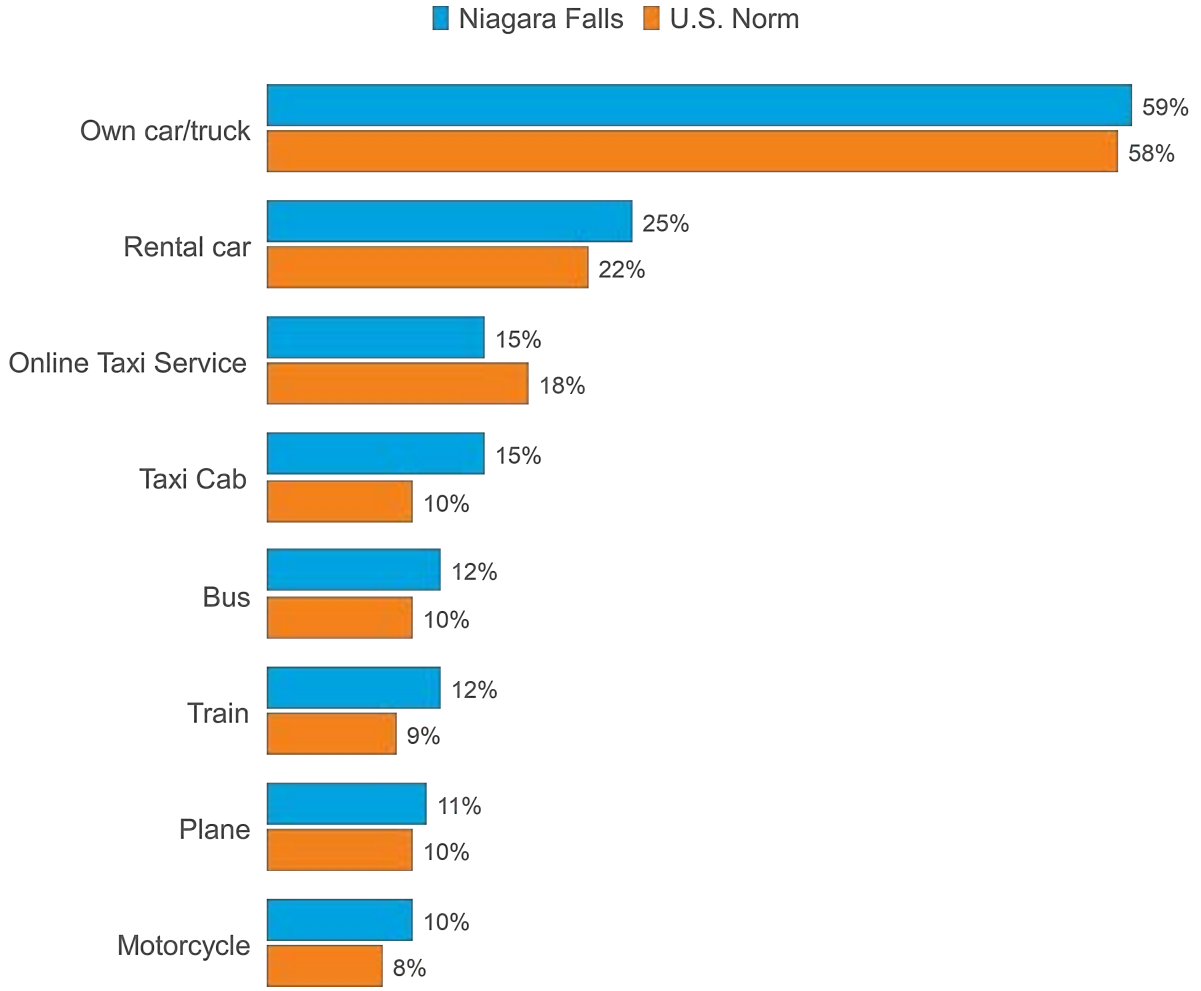
67% **of overnight travelers use own car/truck to get to their destination**

Previous year: 74%



Question updated in 2020

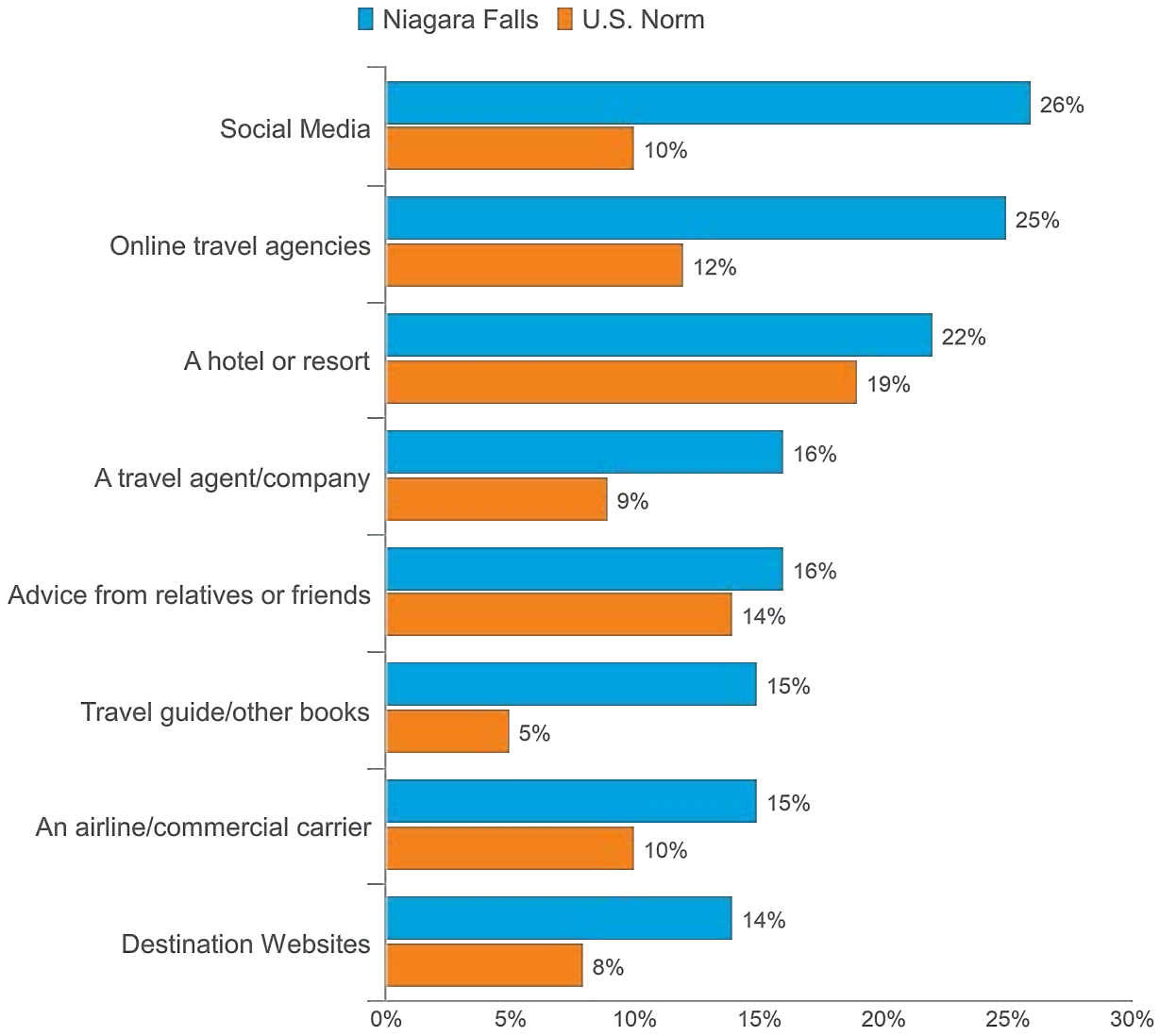
Transportation Used within Destination



Niagara Falls: Pre-Trip

Base: 2022 Overnight Person-Trips

Trip Planning Information Sources



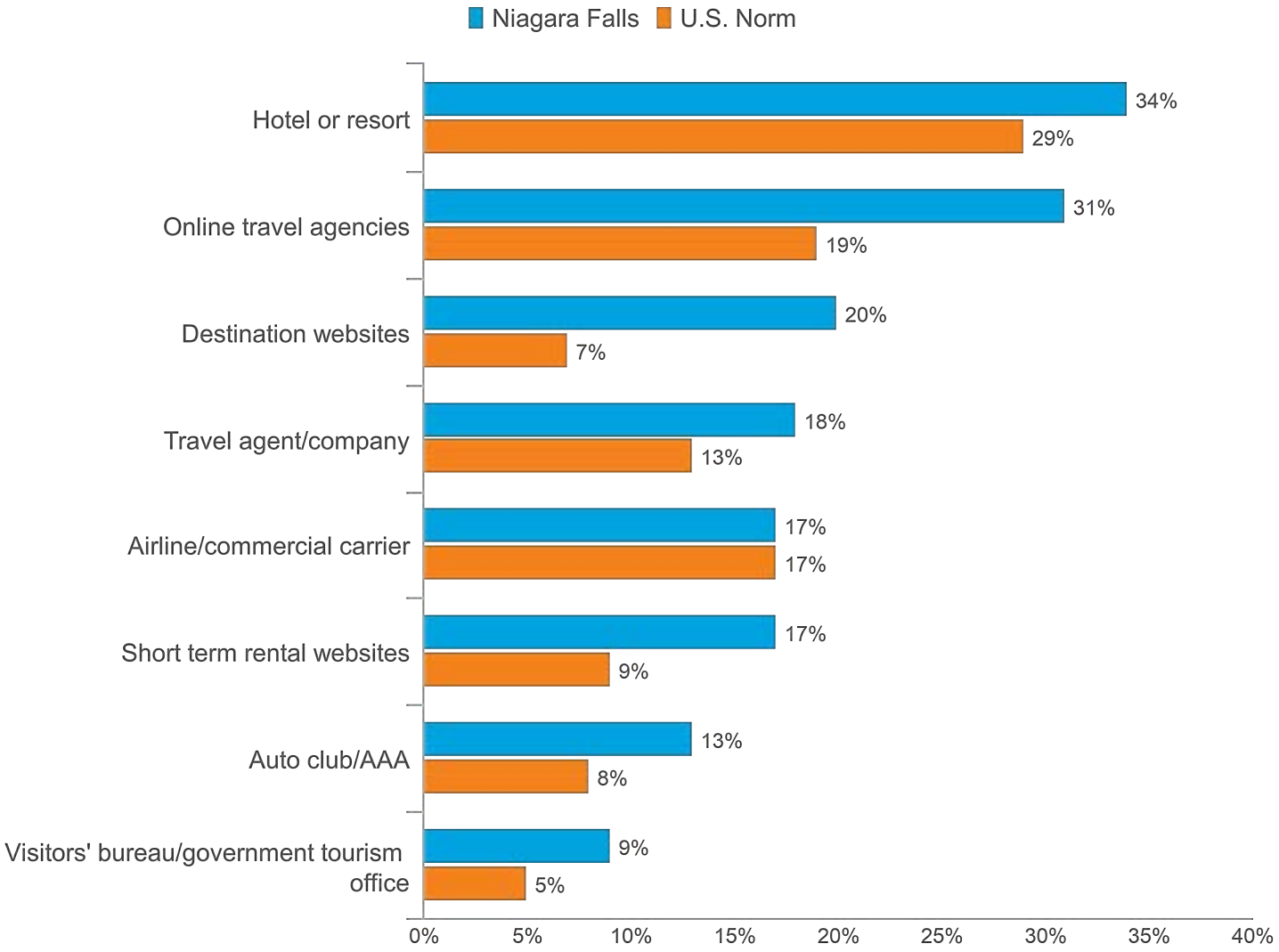
Length of Trip Planning

	Niagara Falls	U.S. Norm
1 month or less	**31%**	**31%**
2 months	**20%**	**16%**
3-5 months	**23%**	**18%**
6-12 months	**14%**	**14%**
More than 1 year in advance	**7%**	**5%**
Did not plan anything in advance	**5%**	**16%**

Niagara Falls' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Method of Booking



Accommodations

	2022	2021
Hotel	**62%**	**55%**
Home of friends / relatives	**21%**	**18%**
Motel	**14%**	**16%**
Bed & breakfast	**14%**	**15%**
Resort hotel	**11%**	**18%**
Rented home / condo / apartment	**9%**	**11%**
Campground / RV park	**7%**	**11%**

Niagara Falls: During Trip

Base: 2022 Overnight Person-Trips

Activity Groupings

Outdoor Activities

64%

U.S. Norm: 48%

Entertainment Activities

77%

U.S. Norm: 54%

Cultural Activities

54%

U.S. Norm: 29%

Sporting Activities

33%

U.S. Norm: 21%

Business Activities

26%

U.S. Norm: 17%

Activities and Experiences (Top 10)

	2022	2021
Sightseeing	37%	32%
Shopping	37%	38%
Landmark/historic site	30%	27%
Museum	25%	28%
Casino	24%	23%
National/state park	23%	24%
Attending celebration	21%	20%
Bar/nightclub	21%	15%
Swimming	20%	23%
Theme park	18%	16%

Niagara Falls: During Trip

Base: 2022 Overnight Person-Trips

Shopping Types on Trip

	Niagara Falls	U.S. Norm
Souvenir shopping	**65%**	**41%**
Outlet/mall shopping	**60%**	**48%**
Convenience/grocery shopping	**51%**	**44%**
Big box stores (Walmart, Costco)	**48%**	**33%**
Boutique shopping	**28%**	**29%**
Antiquing	**21%**	**12%**

Base: 2022 Overnight Person-Trips that included Shopping

Dining Types on Trip

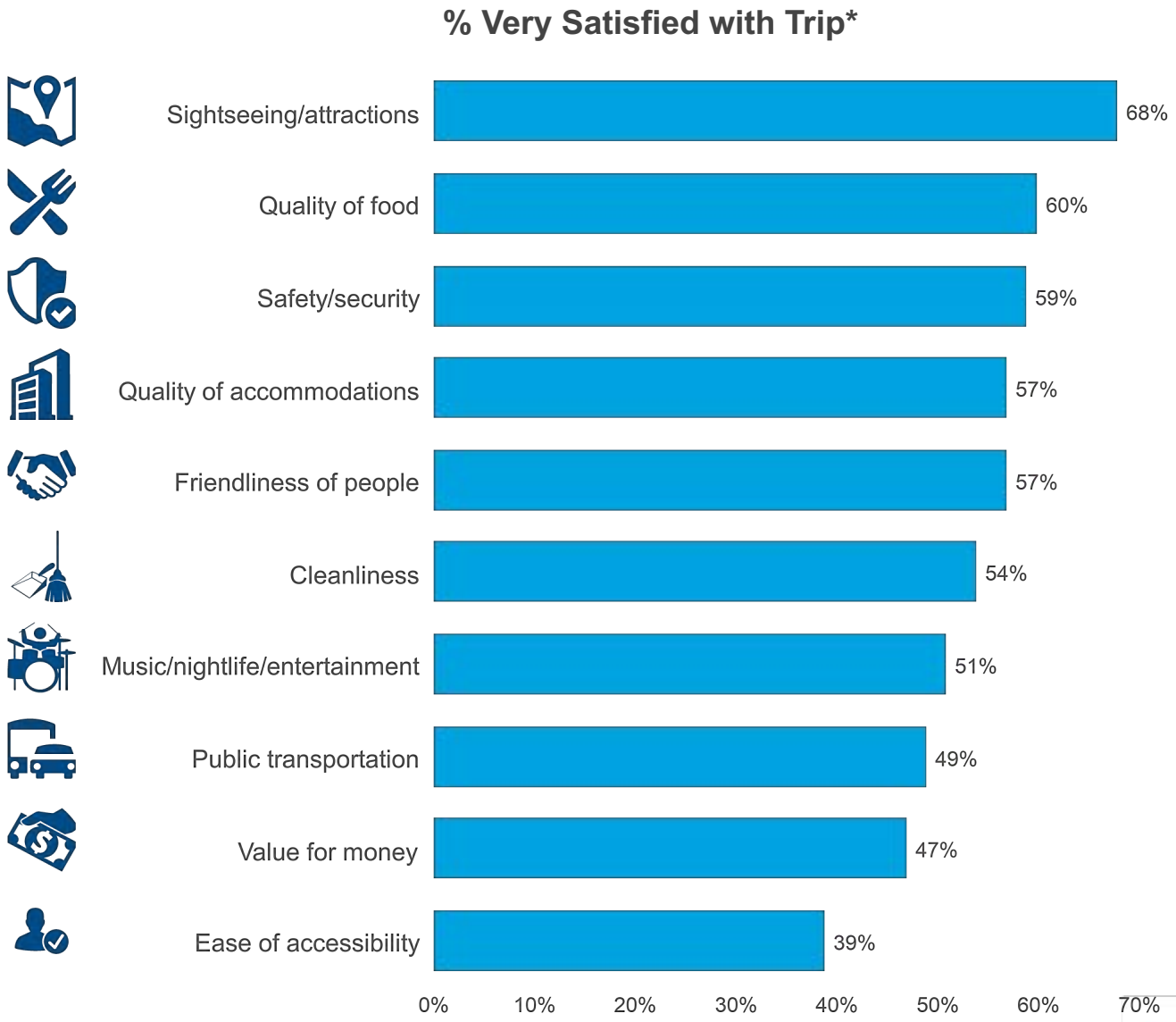
	Niagara Falls	U.S. Norm
Unique/local food	**59%**	**47%**
Food delivery service (UberEATS, DoorDash, etc.)	**41%**	**21%**
Fine/upscale dining	**37%**	**25%**
Street food/food trucks	**32%**	**23%**
Picnicking	**22%**	**13%**
Gastropubs	**14%**	**10%**

Niagara Falls: During Trip

Base: 2022 Overnight Person-Trips

71%

of overnight travelers were very satisfied with their overall trip experience



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

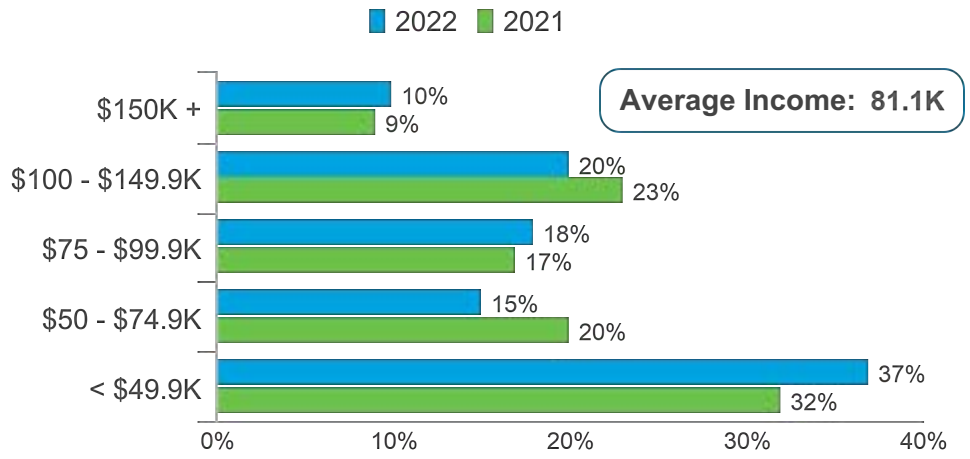
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

Question updated in 2020

Demographic Profile of Overnight Niagara Falls Visitors

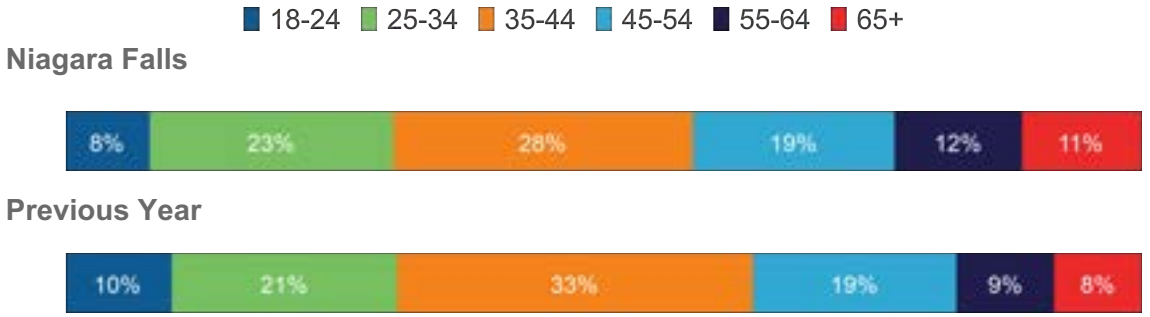
Base: 2022 Overnight Person-Trips

Household Income



Average Income: 81.1K

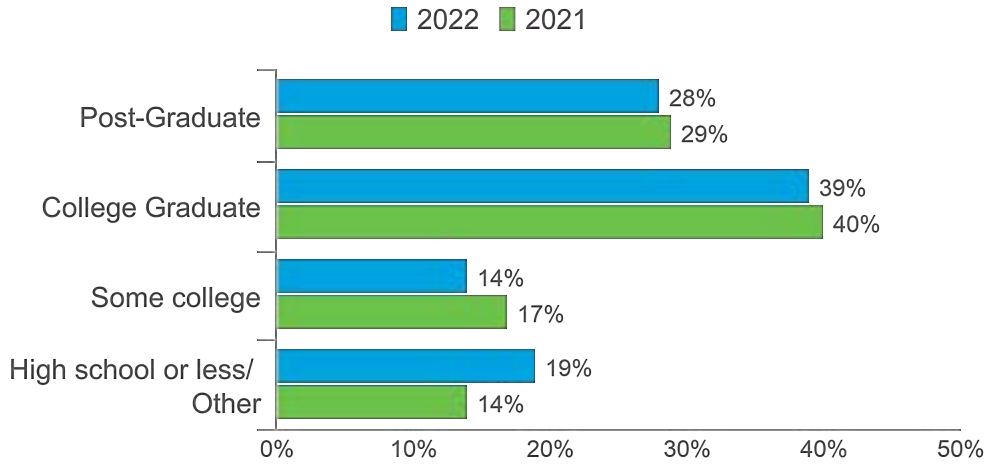
Age



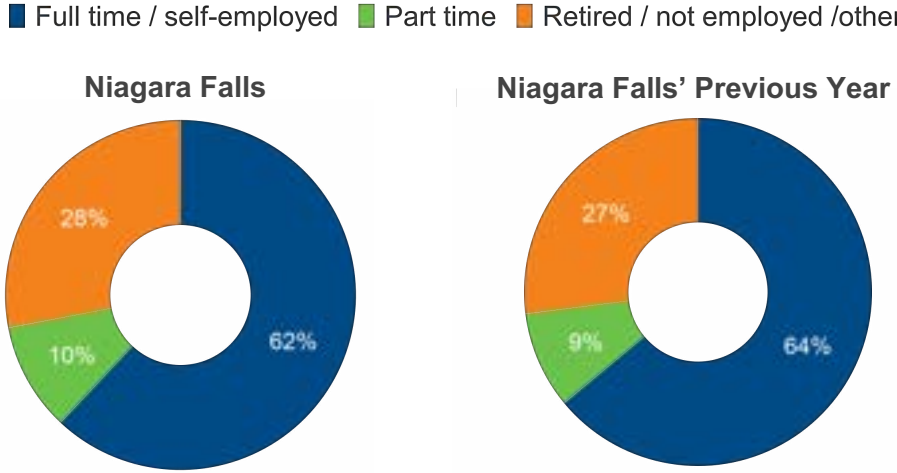
Average Age 43.5

Average Age 41.6

Educational Attainment



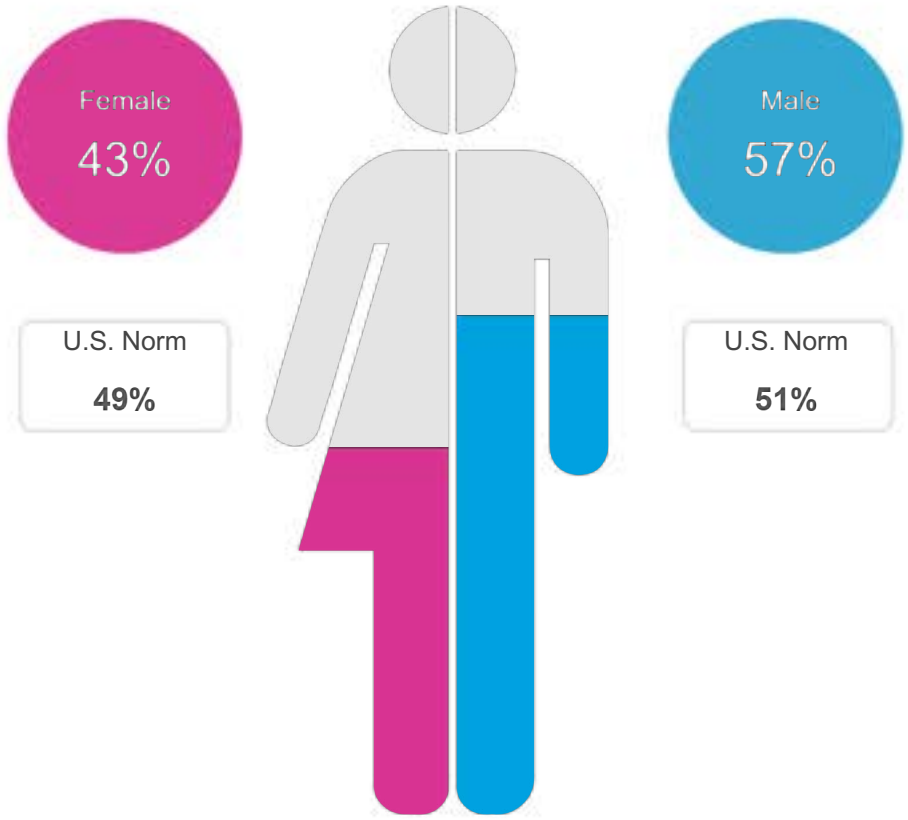
Employment



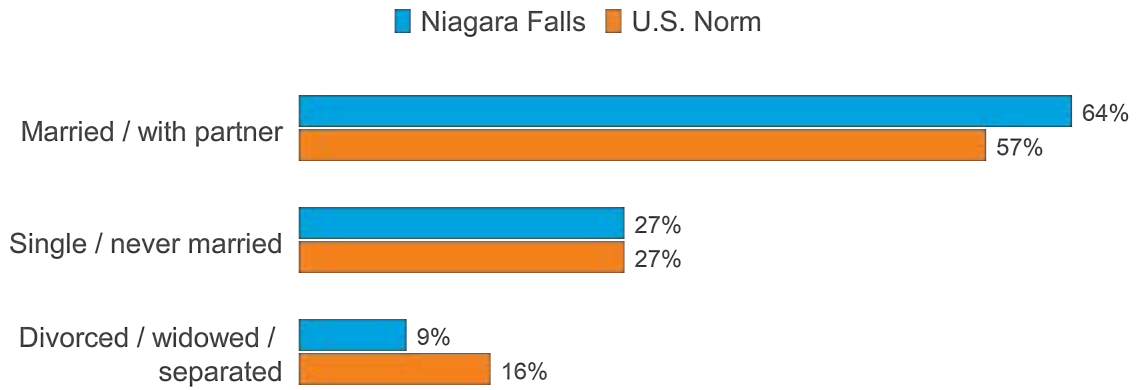
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2022 Overnight Person-Trips

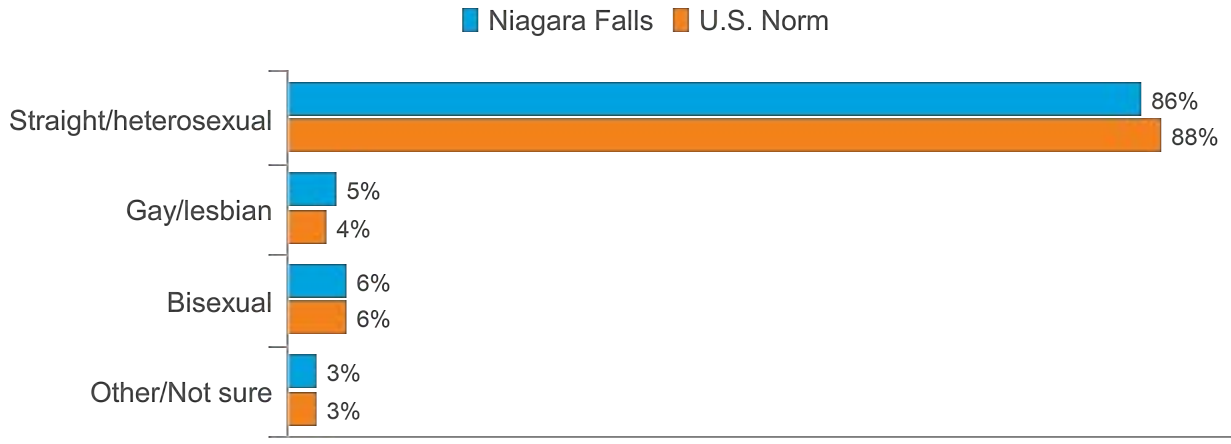
Gender



Marital Status



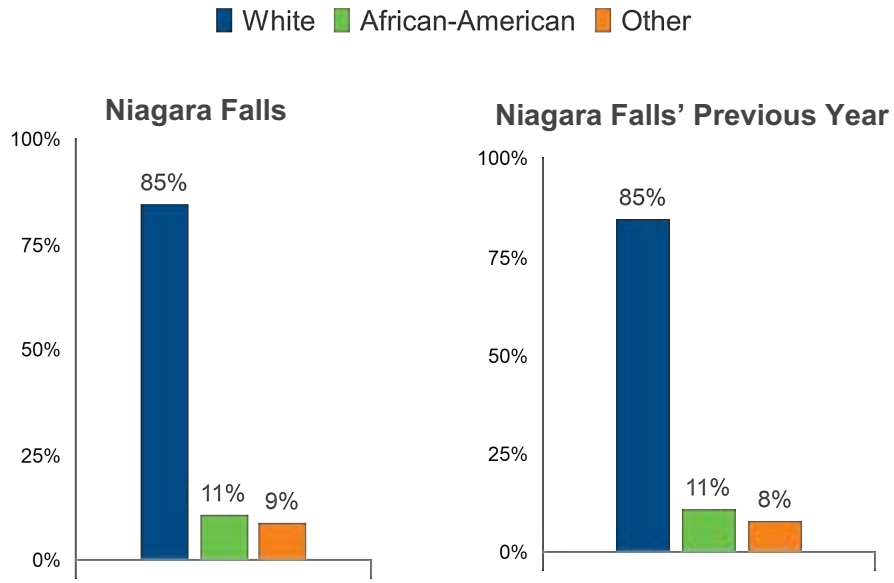
Sexual Orientation



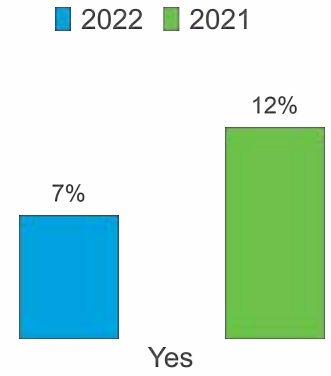
Demographic Profile of Overnight Niagara Falls Visitors

Base: 2022 Overnight Person-Trips

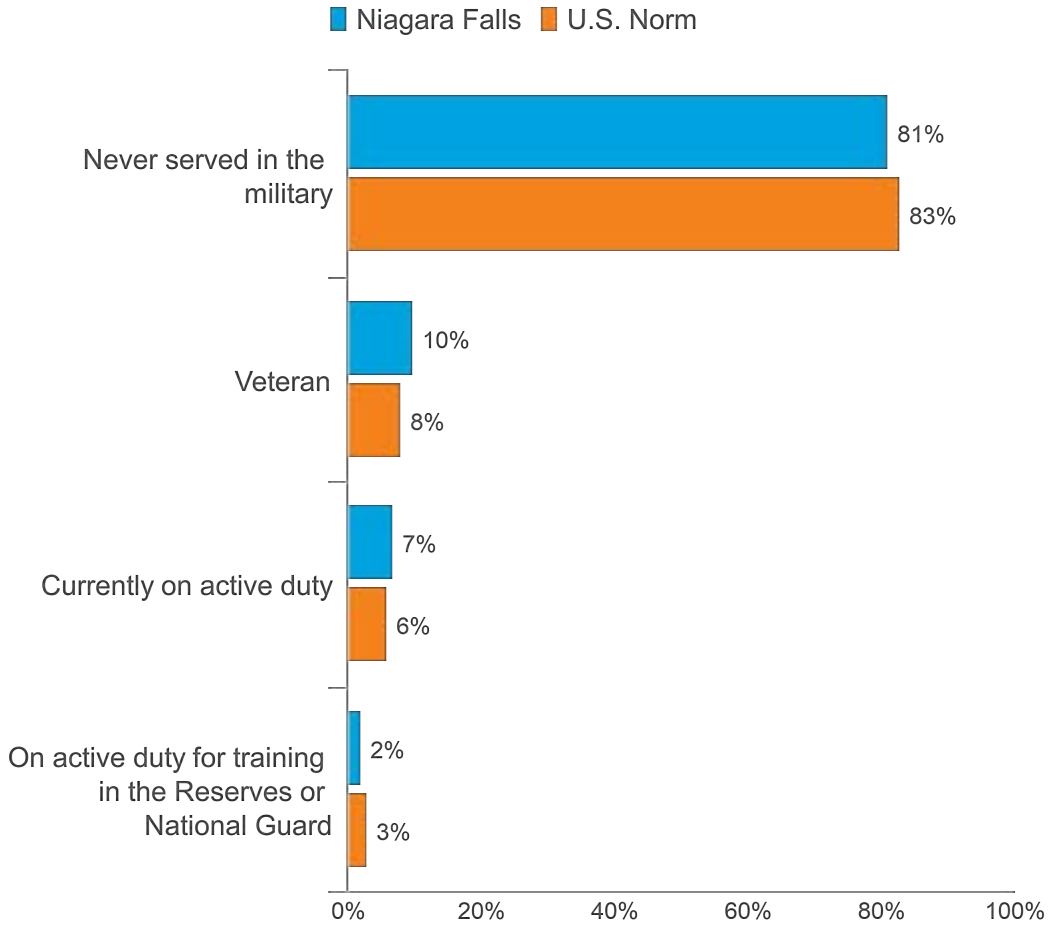
Race



Hispanic Background



Military Status



Demographic Profile of Overnight Niagara Falls Visitors

Base: 2022 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	19%	29%	18%	21%	14%
U.S. Norm	22%	33%	18%	14%	12%

Children in Household

Niagara Falls

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

Niagara Falls' Previous Year

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

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Travel USA Visitor Profile

Day Visitation

NIAGARA FALLS USA

WHERE ADVENTURE COMES NATURALLY®

2021/2022

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 2021 and 2022 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes, seasonality, and total expenditures represent 2022 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 2021/2022:

Day Base Size

239

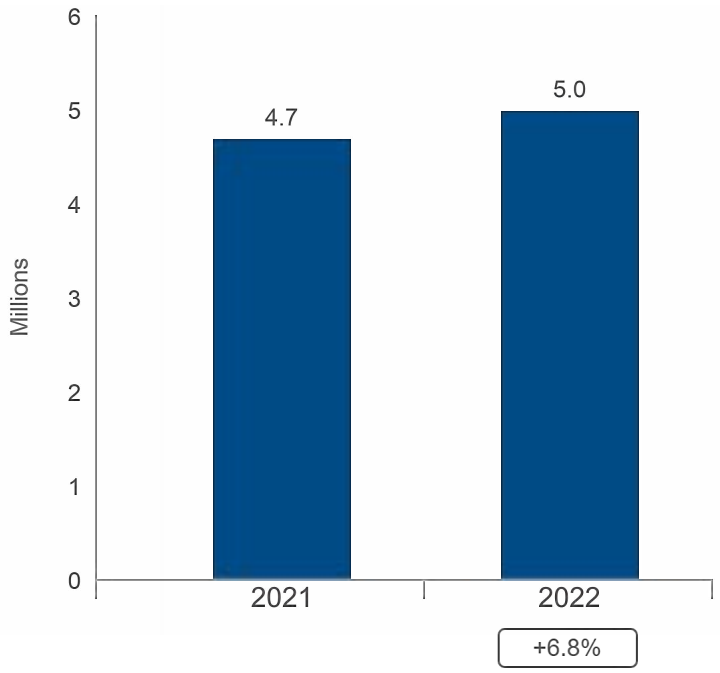
A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

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: 2022 Day Person-Trips

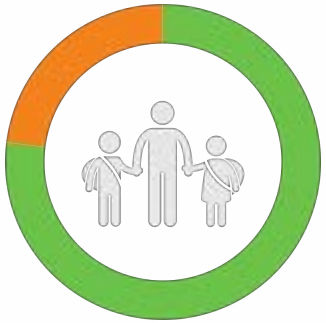
Day Trips to Niagara Falls



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

Total Day Person-Trips

5.0 Million



Adults
77% **3.9 Million**

Children
23% **1.1 Million**

Niagara Falls' Day Trip Expenditures

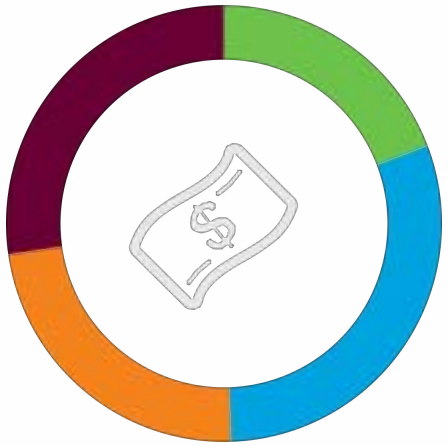
Base: Total Day Person-Trips
*Caution Low Sample

Domestic Day Expenditures - by Sector

Total Spending

$ 0.405 Billion

+21.5% vs. last year

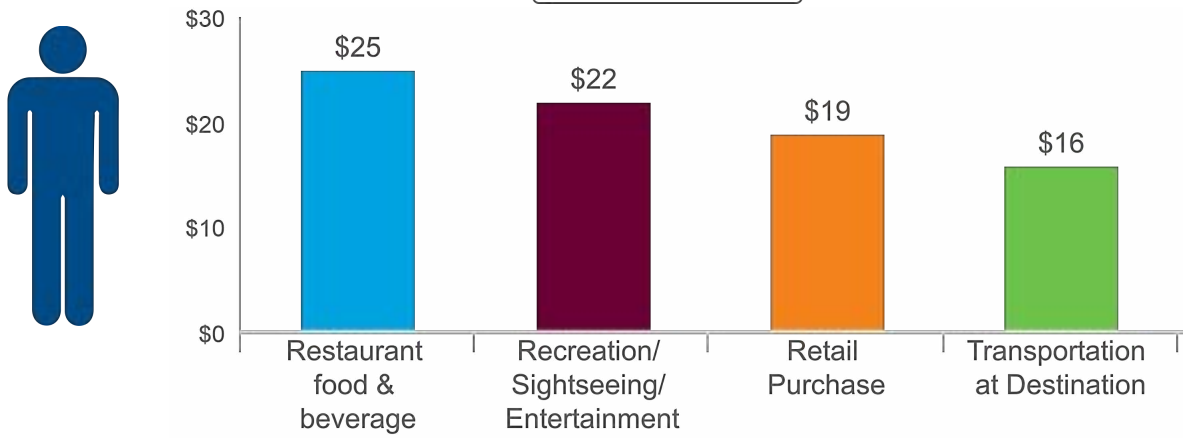


			vs. last year
Transportation at Destination	19%	$77 Million	+30.0%
Restaurant Food & Beverage	30%	$123 Million	+18.6%
Retail Purchase	23%	$94 Million	+19.1%
Recreation/Entertainment	27%	$110 Million	+21.2%

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

Average Per Person Per Trip: $ 81

Last year: $ 71



Niagara Falls' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

Main Purpose of Trip

25%
Visiting friends/ relatives

22%
Touring

12%
Casino

10%
City trip

7%
Special event

7%
Outdoors

3%
Shopping

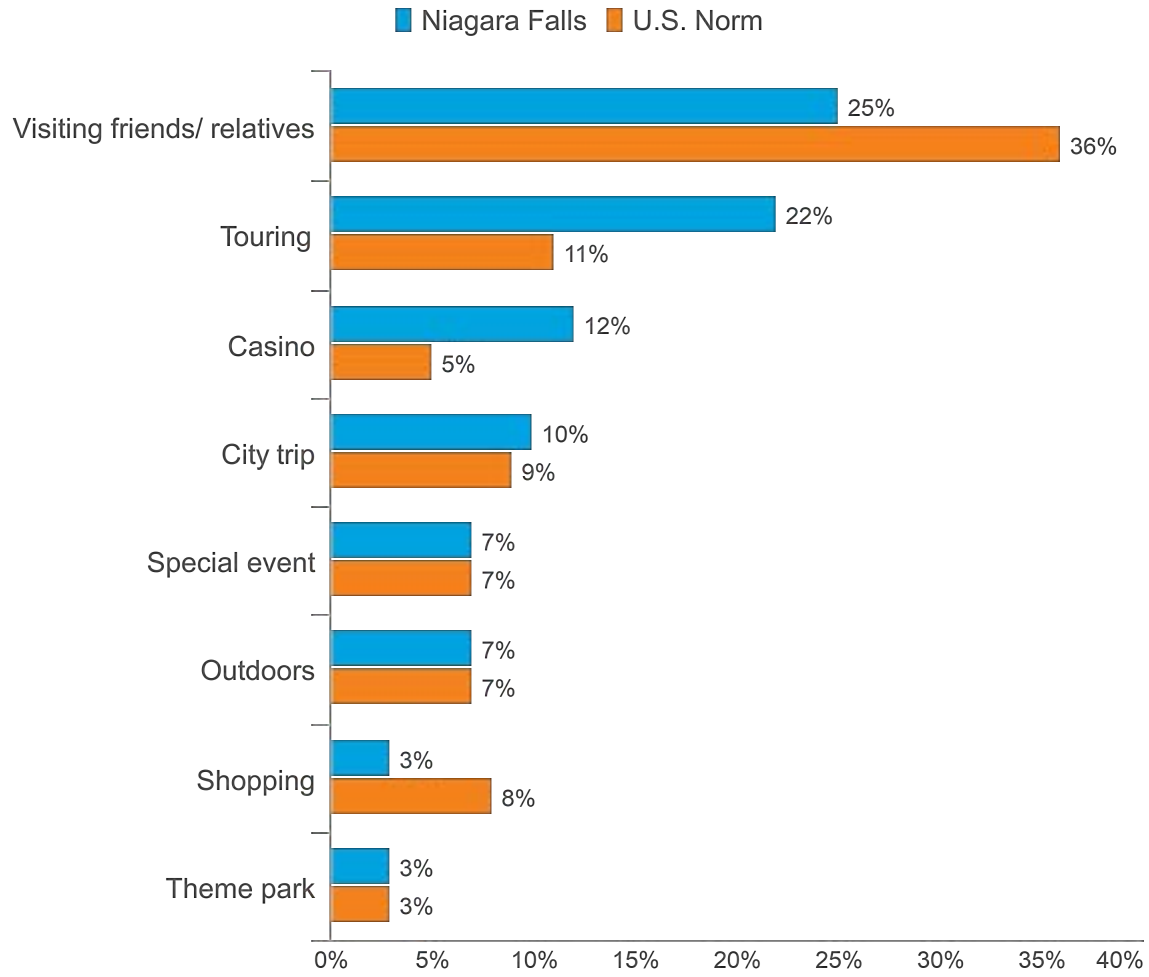
3%
Theme park

2%
Conference/ Convention

4%
Other business trip

1%
Business-Leisure

Main Purpose of Leisure Trip



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

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

2022 U.S. Day Trips

Visiting friends/relatives	36%
Marketable	56%
Business	5%
Business-leisure	3%

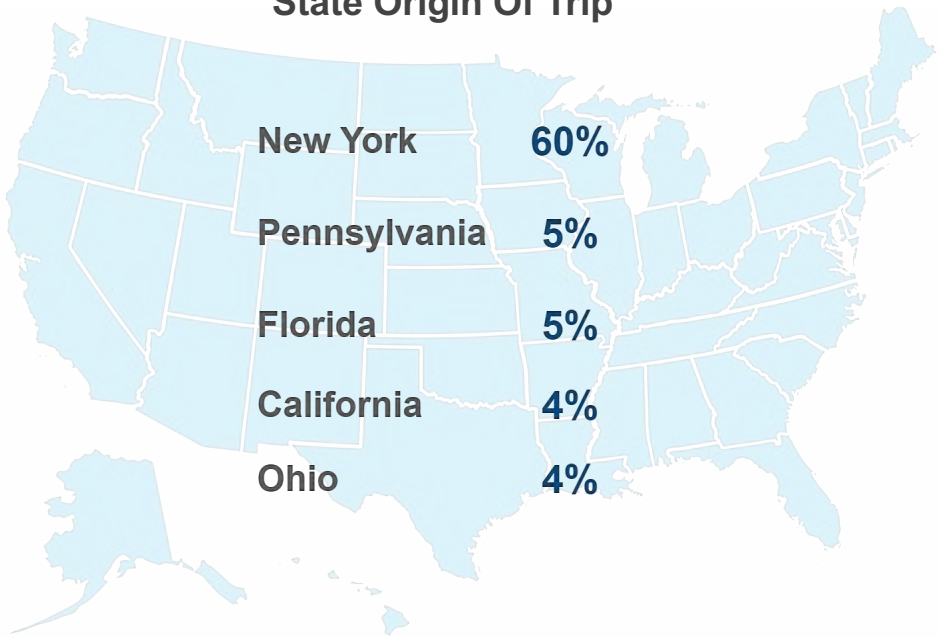
Niagara Falls Day Trips

Visiting friends/relatives	25%
Marketable	67%
Business	6%
Business-leisure	1%

Niagara Falls' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

State Origin Of Trip

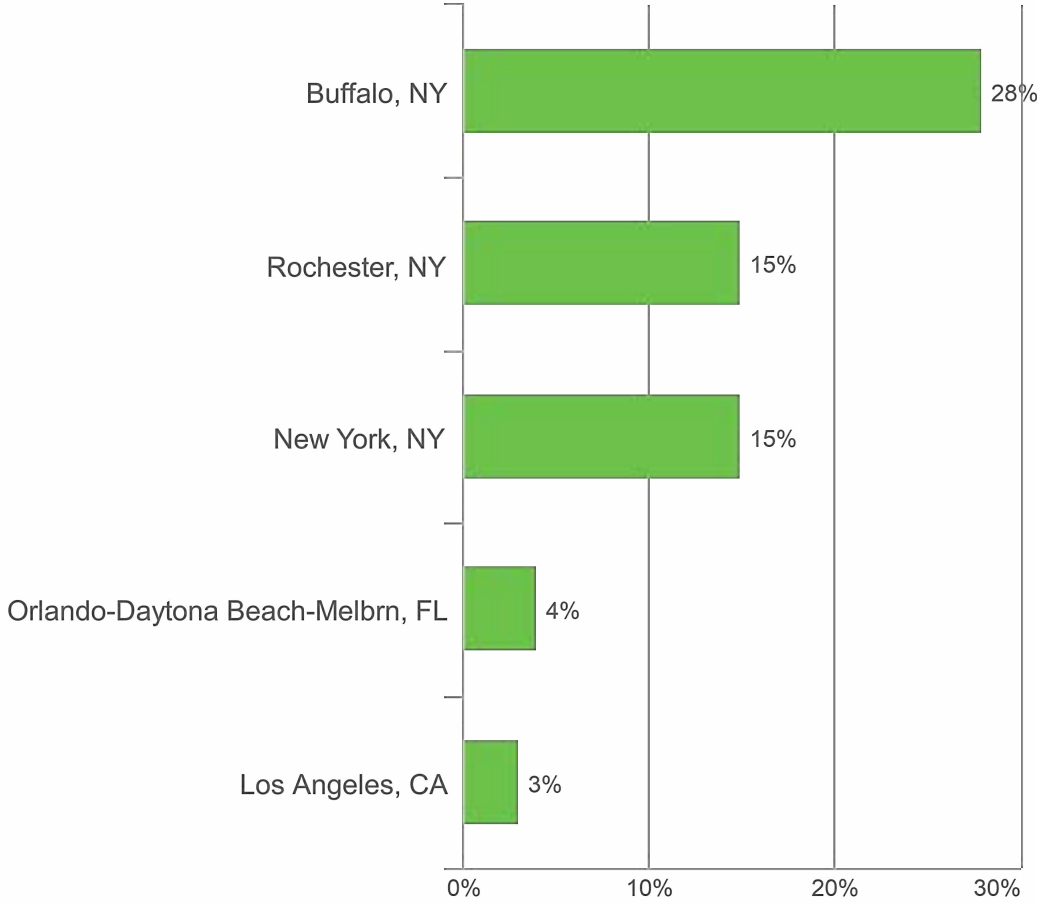


New York	60%
Pennsylvania	5%
Florida	5%
California	4%
Ohio	4%

Season of Trip

Total 2022 Day Person-Trips

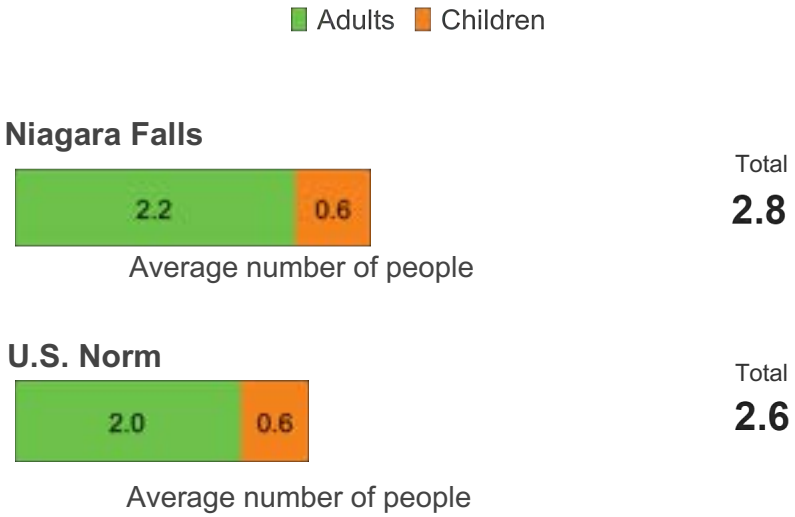
DMA Origin Of Trip



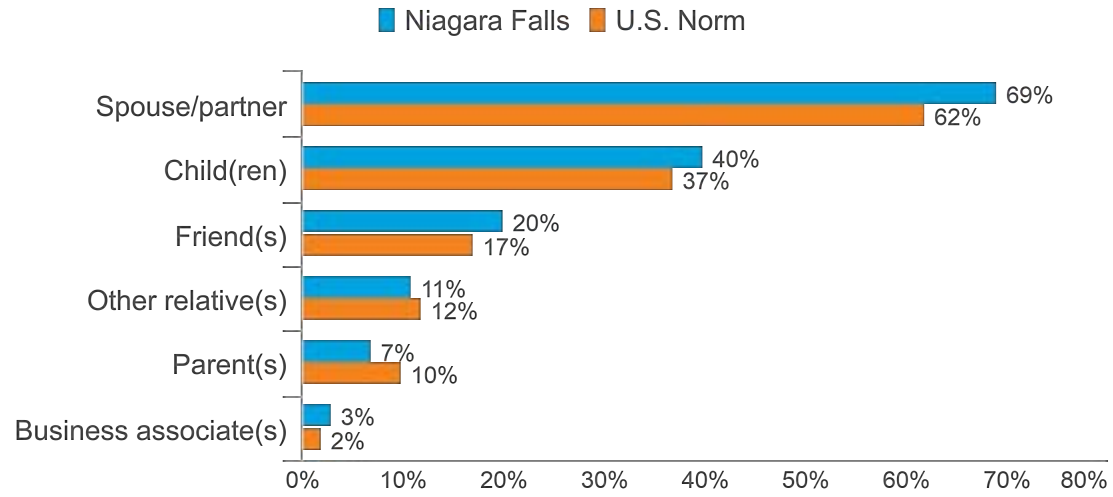
Niagara Falls' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

Size of Travel Party

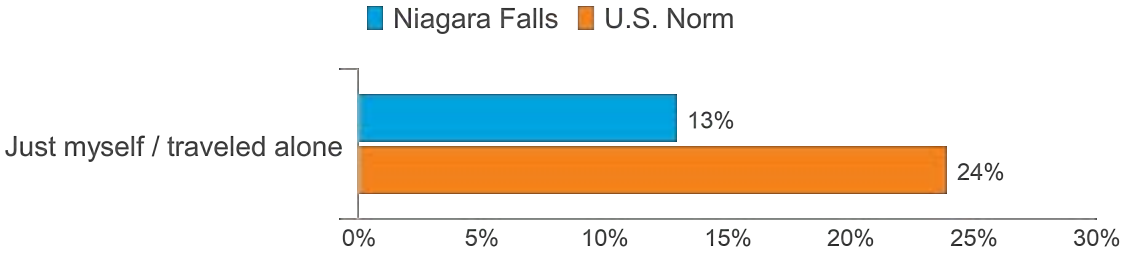


Composition of Immediate Travel Party

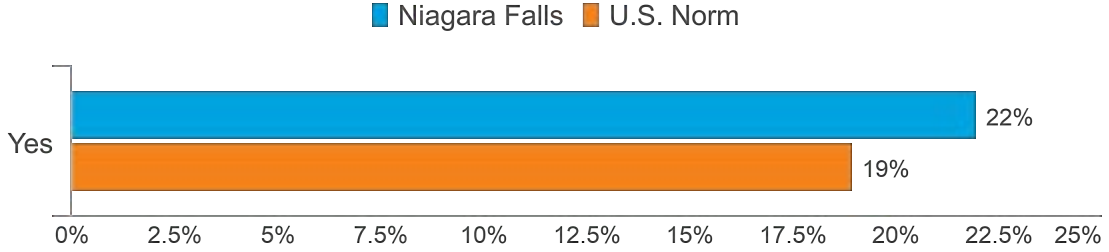


Base: 2021/2022 Overnight Person-Trips that included more than one person

Percent Who Traveled Alone



Percent Who Had Travel Party Member with Disabilities



Question added in 2022, data is for 2022 only

Niagara Falls: During Trip

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

Activity Groupings

Outdoor Activities

54%

U.S. Norm: 34%

Entertainment Activities

70%

U.S. Norm: 40%

Cultural Activities

40%

U.S. Norm: 20%

Sporting Activities

13%

U.S. Norm: 14%

Business Activities

11%

U.S. Norm: 11%

Question updated in 2020

Activities and Experiences (Top 10)

	Niagara Falls	U.S. Norm
Sightseeing	31%	13%
Shopping	30%	21%
Landmark/historic site	24%	8%
Casino	23%	8%
National/state park	21%	5%
Museum	16%	7%
Bar/nightclub	13%	6%
Nature tours/wildlife viewing/birding	12%	5%
Local parks/playgrounds	11%	6%
Hiking/backpacking	11%	5%

Niagara Falls: During Trip

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

Shopping Types on Trip

	Niagara Falls	U.S. Norm
Souvenir shopping	**66%**	**26%**
Outlet/mall shopping	**43%**	**48%**
Boutique shopping	**27%**	**23%**
Big box stores (Walmart, Costco)	**26%**	**29%**
Convenience/grocery shopping	**25%**	**28%**
Antiquing	**13%**	**12%**

Base: 2021/2022 Day Person-Trips that included Shopping

Dining Types on Trip

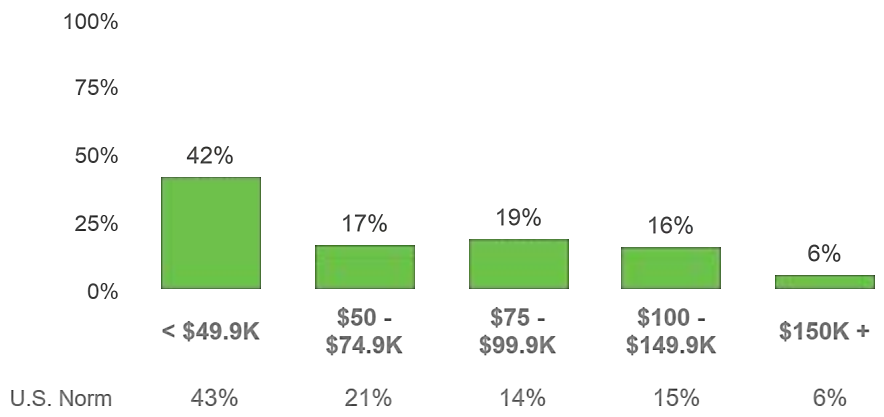
	Niagara Falls	U.S. Norm
Unique/local food	**47%**	**38%**
Street food/food trucks	**26%**	**19%**
Fine/upscale dining	**23%**	**15%**
Picnicking	**16%**	**12%**
Food delivery service (UberEATS, DoorDash, etc.)	**14%**	**13%**
Gastropubs	**12%**	**7%**

Question added in 2020

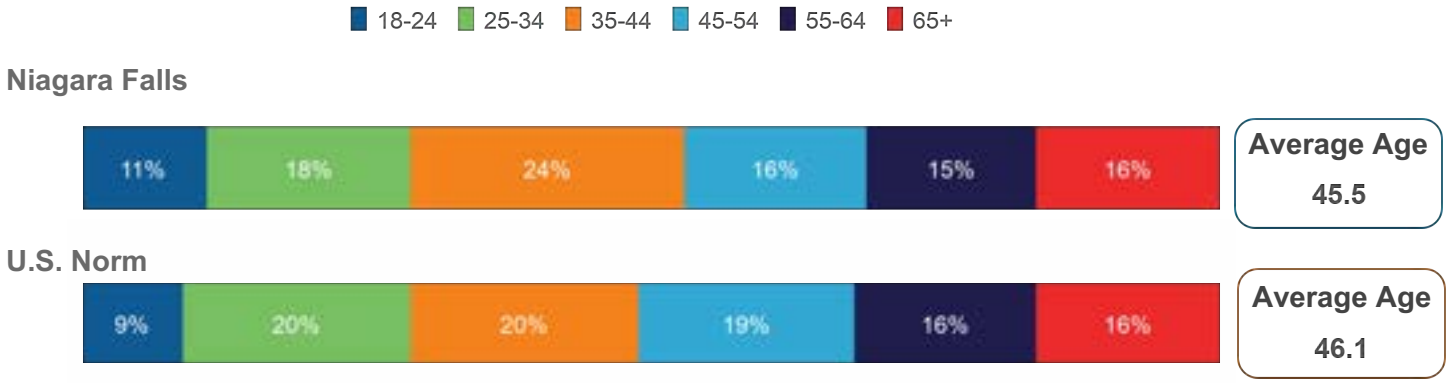
Demographic Profile of Day Niagara Falls Visitors

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

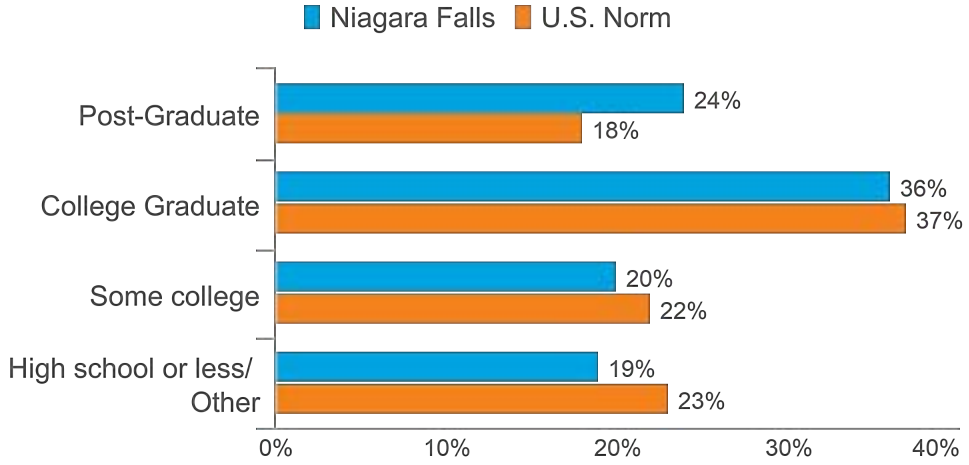
Household Income



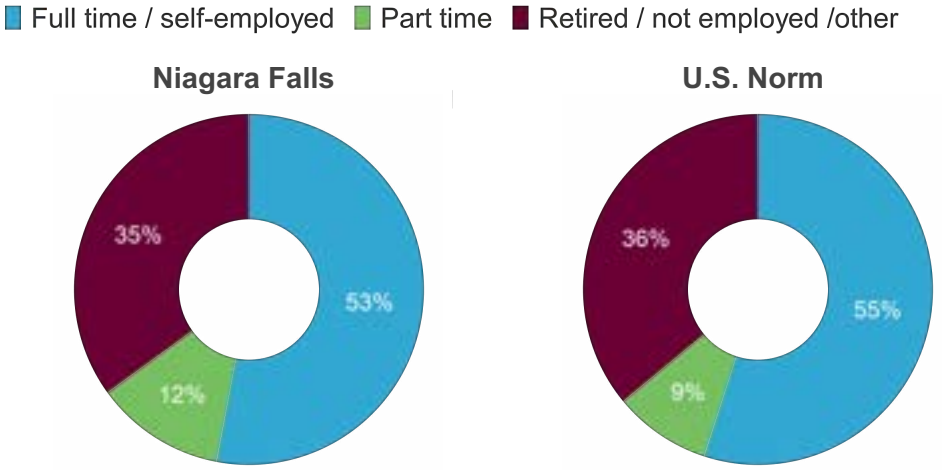
Age



Educational Attainment



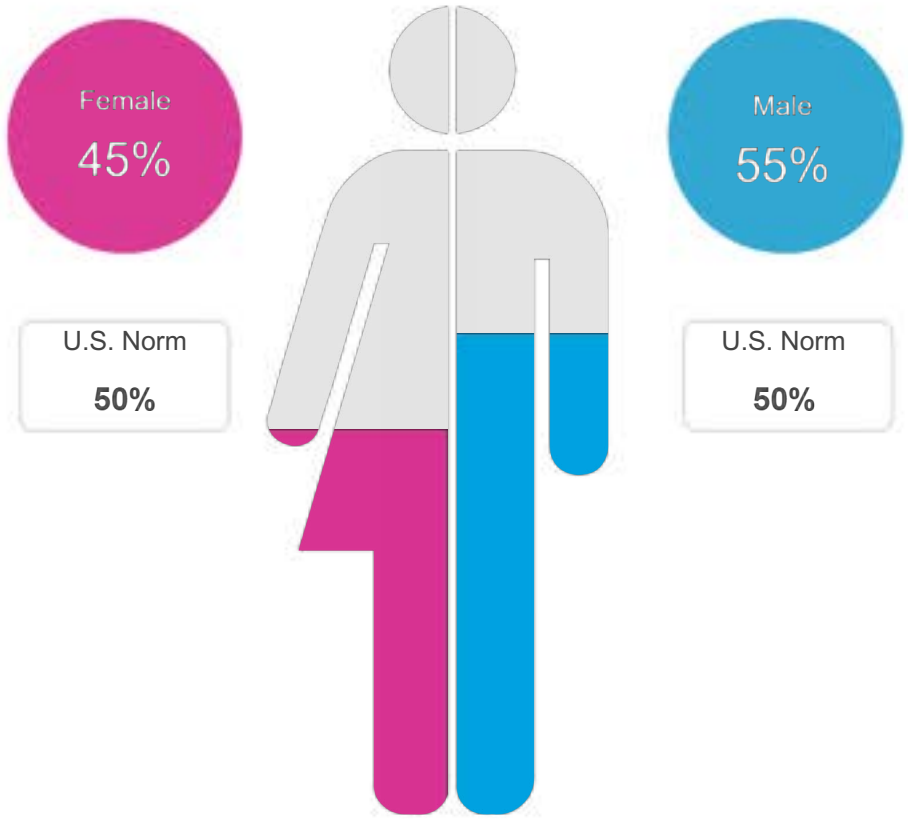
Employment



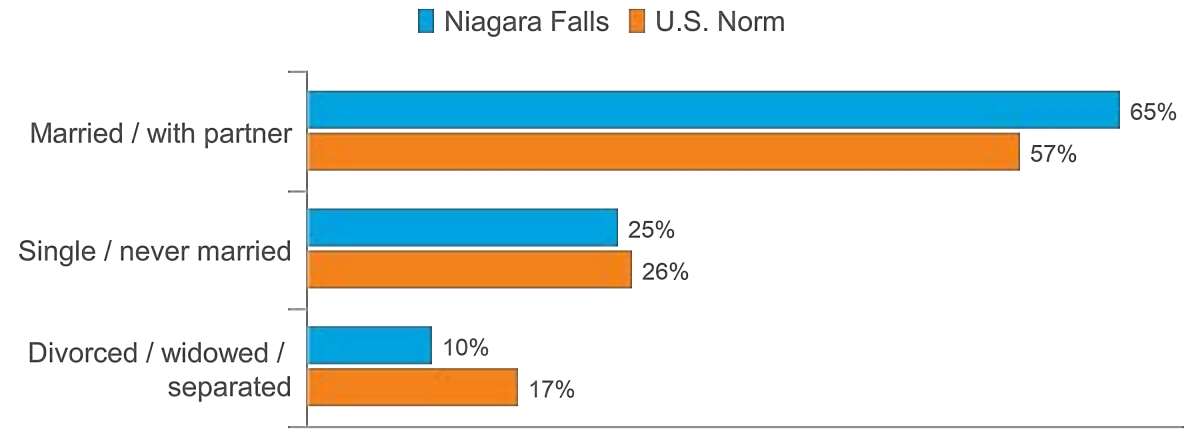
Demographic Profile of Day Niagara Falls Visitors

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

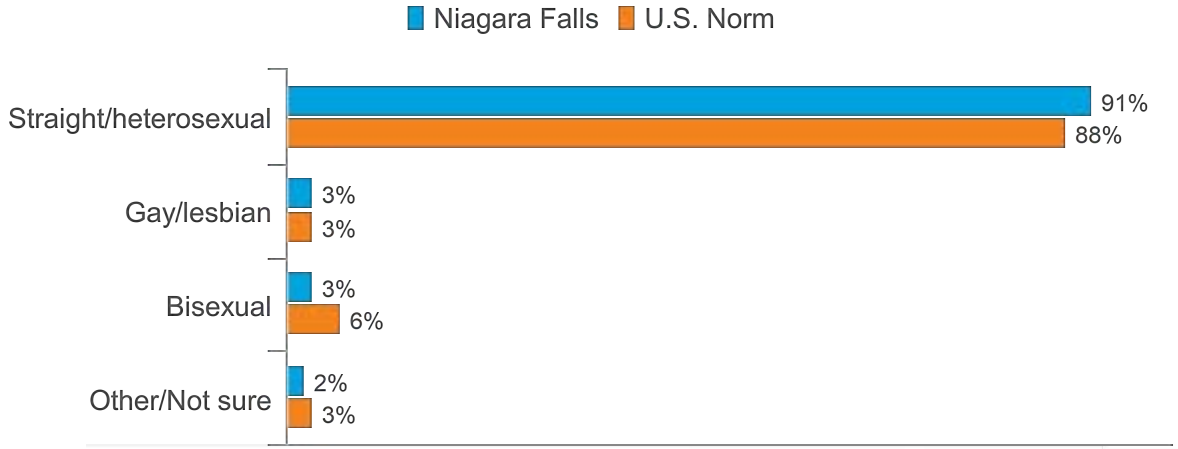
Gender



Marital Status



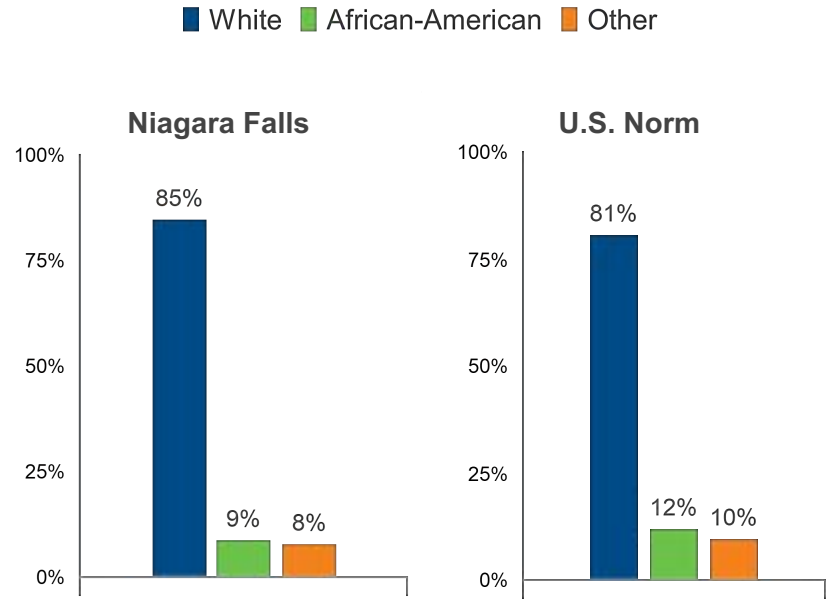
Sexual Orientation



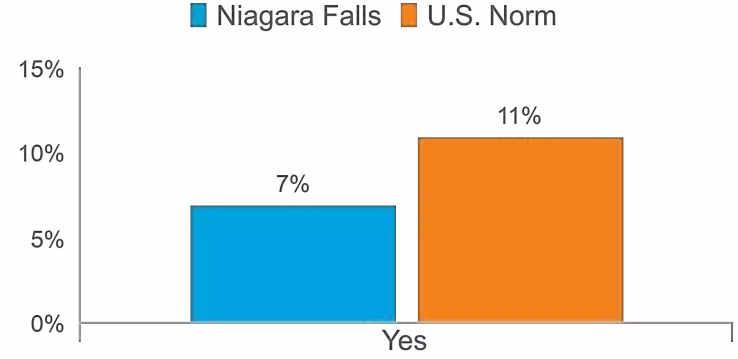
Demographic Profile of Day Niagara Falls Visitors

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

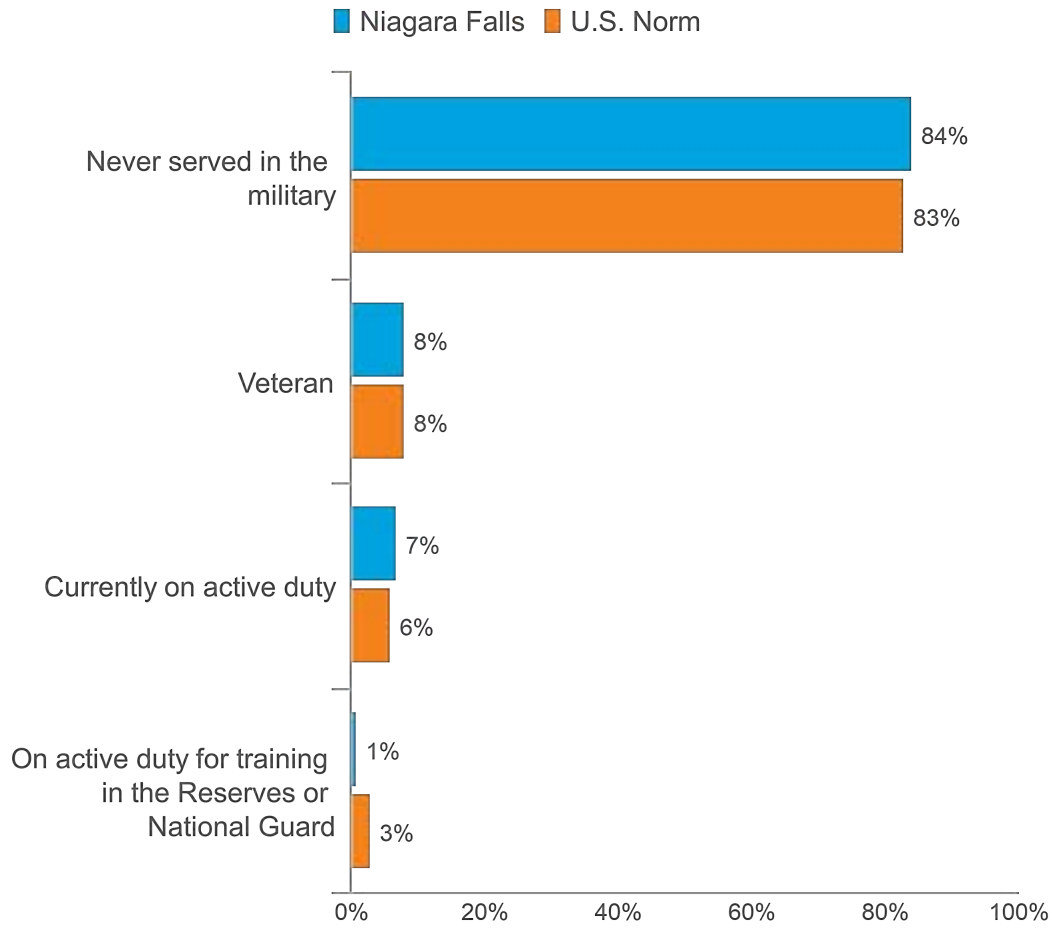
Race



Hispanic Background



Military Status



Question added in 2022, data is for 2022 only

Demographic Profile of Day Niagara Falls Visitors

Base: 2021/2022 Day Person-Trips
*Caution Low Sample

Household Size

	1 member	2 members	3 members	4 members	5+ members
	23%	30%	16%	20%	11%
U.S. Norm	23%	34%	19%	14%	11%

Children in Household

Niagara Falls

No children under 18	51%
Any 13-17	20%
Any 6-12	28%
Any child under 6	18%

U.S. Norm

No children under 18	56%
Any 13-17	20%
Any 6-12	24%
Any child under 6	16%

COMPASS
Longwoods
INTERNATIONAL