

2016 ANNUAL REPORT NAGARA FALLS® USA









TOURISM = ECONOMIC IMPACT

Travelers to Niagara County spent a total of \$650,843,000 in 2016.



Includes Lodging, Recreation, Food & Beverage, Retail and Service Stations, Transportation.

The tourism industry in Niagara County employs 15,263 people which represents 21% of the total workforce.

Increased Local & State Tax Revenue





Represents an increase of 8.1% over 2015.

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Source: Tourism Economics, a division of Oxford Economics produces the Economic Impact of Tourism in New York 2016 Calendar Year

> Local and state tourism generated taxes reduced the tax burden by \$906 per Niagara County household.

Niagara Falls USA 2016 Visitor Report:

In 2016, Destination Niagara USA engaged an independent research company to do a comprehensive study on visitors to the Niagara Falls USA region. The insights garnered from the report will be invaluable in helping us promote the region for the future.



SEASON OF TRIP Base: Overnight Person-Trips







Source: Research provided by Longwoods International.

Adults Children

Overall Organization ROI – 22:1

^s Business directly influenced by Destination Niagara USA divided by bed tax and casino revenue generated the above return.



DIGITAL MARKETING PROGRAM

The 2016 digital marketing efforts delivered inspiring and engaging content to specifically targeted online consumers. Below are the direct results of these efforts.



All data is tracked, measured and reported independently by Texas A&M University. ^{\$}Above amount used in calculation of organization ROI on page 3.

Hotel Data

SMITH TRAVEL RESEARCH DATA (STR REPORT)





Occupancy (Decrease Of .2% From 2015)



REVPAR (3.9% increase from 2015)

MEDIA

As stewards of a world-renowned icon, we work tirelessly to garner significant media attention. It is also invigorating when the rest of the region gets the attention it deserves.



What the media is saving about Niagara Falls USA:

"Niagara County, which straddles the U.S. and Canada. is best known for one of the world's most famous and most recognizable natural wonders. But while Niagara Falls has delighted visitors for decades - earning it the title of "honeymoon capital of the world" — there's plenty to see beyond the falls, too. Greater Niagara County has some of the most important historical sites in American history and some of

the most entertaining characters that bring them to life, all within a short distance from the city."

Shermans**Travel** HAND-PICKED DEALS. EXPERT ADVICE.

Hillary Richard,

Sherman's Travel

"There seems to be something in the water that makes the people of Niagara so real, down-to-earth and inviting, that it makes the

all-around experience of traveling to this part of Upstate New York so exceptional. Niagara Falls has always been an amazing natural and majestic wonder. Now, the city and the salt of the earth people of Niagara are transforming this region into a bucket list destination with substance."



Illumination

On December 1, 2016, the Niagara Falls Illumination Board unveiled a \$4 million upgrade to the lights that shine on Niagara Falls. Destination Niagara USA hired an Associated Press video crew to capture the event in order to release the footage to the worldwide media. The coverage results were extraordinary.

550,051,262 media impressions

including more than 20 major media outlets such as USA Today, Forbes, The Today Show, BBC, The Weather Channel and Huffington Post.

Jeff Game, Huffinaton Post



WEBSITE AND SOCIAL MEDIA



2016 WEBSITE VISITATION:

1,876,032

Fans for Facebook, Twitter and Instagram:



Total Fans for all three channels: **81,804** (+11.5%)

Link clicks from posts: 123,126

Total impressions for Facebook and Twitter: 11,073,041 (+147.1%)

Overall engagement for Facebook, Twitter and Instagram: 120,141 (+39.9%)





Searches through book direct: 214,451



"Click through" from Book Direct to hotel sites: **114,769**

WELCOMING THE WORLD

We know the world is coming to visit and we want to make sure everyone has an extraordinary experience. That's why we ensure every connection a person has with our brand from the website and social media to in-region services is an exemplary one.

Visitor Center

- In 2016 the Niagara Falls USA Official Visitor Center welcomed 119,916 visitors from over 80 countries.
- This signified a 12.8% increase over 2015.
- Tour referrals sold through Visitor Center: \$69,022.^{\$}

EXP Niagara

- This free online training program provides the hospitality and tourism community with the training needed to enhance visitor experiences by educating them on our destination's tourism product as well as customer preferences.
- EXP Niagara launched on May 4th and through the end of the year, 115 Niagara County hospitality and tourism partners completed the program to become Certified EXP Pros.

^{\$}Above amount used in calculation of organization ROI on page 3.

Day of Appreciation

 The second annual Day of Appreciation took place on May 4, 2016 to celebrate all hospitality employees and their contribution to Niagara County's tourism industry. Over 700 attendees enjoyed food, entertainment and prize giveaways.

Welcome Banners

 In an effort to help welcome incoming visitors to the downtown Niagara Falls corridor, lamppost banners were erected with the word "welcome"

in 6 languages. The banners also include a variety of images of the various attractions that our destination has to offer.



Discover Niagara Shuttle

 In 2016, the Niagara Falls National Heritage Area launched the Discover Niagara Shuttle with the financial partnership of several local organizations including Destination Niagara USA. The free shuttle service connects tourist attractions and communities from Niagara Falls to Old Fort Niagara in Youngstown.





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INTERNATIONAL SALES

By establishing relationships with partner organizations with a worldwide scope, Destination Niagara USA provides easier access to the region to visitors across the world.

Global Initiatives

ViaAir

 A charter airline VIACAIR that brings visitors from New York City directly to NFIA.
 Welcomed a total of 4,291 passengers in 2016. This represents an increase of 86% over 2015.

Wine, Water and Wonder of Upstate New York

- Now in its 11th year, the WWW program continues to be a successful multiregion marketing program. A 2015 grant from New York State allowed the program participants to hire in-market representation for the rapidly emerging German market.
- Hosted a reception in New York City for receptive tour operators based in New York and New Jersey. Several Niagara Falls USA partners also attended, including Leonard Oaks Winery, Fashion Outlets of Niagara Falls USA and Hard Rock Café.
- As part of our partnership in the Wine Water & Wonders of Upstate New York program, Niagara Falls USA was highlighted in ATI's inaugural magazine, Where Next! for their escorted tours. Each motorcoach seatback had a copy of the magazine with a distribution of 50,000.

Partnership with ILOVENY



Melbourne, Brisbane) and New Zealand (Auckland). This resulted in 5 top travel agents from Australia and several site visits to Niagara Falls USA with agents and operators. An American Airlines representative was also in attendance and provided the airfare for this travel.

 We hosted tour operators from mainland China in Niagara Falls USA, along with the State of NY's Chinese sales representative.

Brand USA

• The Inspiration Guide is an international print publication in collaboration with Brand USA featuring

partners in formatted "advertorial" style layouts.

- Over 575,000 copies are distributed in 13 languages in over 55 countries.
- Participated in the Brand USA India Sales Mission to Mumbai, Delhi and Bengaluru. Met with over 100 operators.
 90% of these tour operators are currently promoting Niagara Falls USA product.

American Tours International (ATI)



operators representing Visit USA programs throughout the world added Niagara Falls to several of the packages they are currently selling.

The National Tour Association (NTA)

 Hosted 15 Los Angeles
 based receptive operators in Niagara Falls USA that cover the Chinese market in order to expand Niagara Falls USA product knowledge.

L & L Tours

 Brought 200,000 Chinese visitors to Niagara Falls USA in 2016 – a 33% increase over 2015.

US Travel Association IPW-The travel industry's premier

international marketplace and the largest generator of travel to the U.S.

 Partnered with Fashion Outlets Niagara Falls USA, Niagara Jet Adventures, Whirlpool Jet Boats, Niagara Adventure Theater and Hard Rock Café participating in 98 business appointments resulting in 72 leads for Niagara Falls USA partners.



BUFFALO NIAGARA CANADIAN MARKET PROGRAM

This year, we continued a cross-border digital marketing initiative with our Buffalo counterparts through a New York State grant.

2016-17 Joint Canada Initiative





All data is tracked, measured and reported independently by Texas A&M University. * ROI for both Destination Niagara Falls USA and Visit Buffalo Niagara (not calculated in Organization ROI)



LEISURE GROUP SALES

Group Sales is an integral part of our economic growth. Our team makes it easy for groups to plan and book visits to Niagara Falls, USA.

Tours

80 Overnight Groups Estimated Economic Impact: \$1,236,790 **47** Day Trips Estimated Economic Impact: \$208,930

Estimated Economic Impact: 35,620

Additional Group Assisted

TOTAL = 133 GROUPS*



*Motorcoach business booked by Destination Niagara USA Staff. Not all Motorcoach business is reported to our organization. ^sAbove amount used in calculation of organization ROI on page 3.



Tradeshow





FAM Tour

- The Leisure Group Sales Department hosted a 3 night, 4 day FAM tour in June 2016. Twenty-four domestic tour operators were in attendance from 11 states (CA, FL, KY, IL, MI, ND, NJ, NY, OH, PA, VA.)
- As a result of the FAM, we have booked business with 6 of the attendees, some with multiple tour dates. This has so far resulted in 10 tours to Niagara Falls USA for 2017 & 2018.







EEI: \$181,888

Return on Investment – **6.5:1**



CONVENTION AND MEETING SALES

From the grandeur of the region to adrenaline-pumping activities, we are uniquely positioned to be the perfect hosts for regional and national conventions. In fact, convention sales continue to build a strong presence in New York State and National Association marketplaces.



\$7,094,016 57,094,016

Return on Investment – **57:1**

^s EEI formula for conventions is \$192 per person per day based on Longwoods Travel USA research.
^s Above amount used in calculation of organization ROI on page 3.



Niagara Falls USA 2016 Annual Report | Share your experience with #NiagaraFallsUSA!

PRINT WORTHY

We produce a number of different publications that highlight and promote the region to travelers from all walks of life. Not only do they entice people to visit, they also become a useful resource to help them get the most out their Niagara Falls USA experience.





Travel Guide

With a circulation of more than 550,000, the Travel Guide provides an in-depth platform on which to tell the real story of Niagara Falls USA to visitors from all over the world.

Experience Niagara Falls USA

Once visitors are in Niagara Falls USA, we provide them with engaging stories and ideas on what there is to see and do while here, making it easy for them to extend their stay. Distributed in over 96% of accommodation properties across Niagara County.



International Rack Cards

In an effort to better serve our non-English speaking visitors, we developed a rack card in six languages which provides a brief destination overview and product offerings. Rack cards are on display and available in the Niagara Falls USA Official Visitor Center.



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Destination Planner



As we continue to grow our groups and meetings business, Niagara Falls USA's Destination Planner provides resources for domestic and international tour operators and meeting planners with suggestions of what to see, what to do and where to eat throughout Niagara Falls USA.

Shopping Guide

A joint effort between Visit Buffalo Niagara and Destination Niagara USA, initially created for our Canadian visitors, showcasing the abundance of shopping opportunities. This guide is also available to all visitors interested in shopping information.





OUTDOOR PROMOTIONS

Niagara Falls USA is known for the wide variety of outdoor activities it has to offer—and we're making sure that it is well known. From articles in national publications to hosting national events, we are recognized as a destination of choice for outdoor enthusiasts everywhere.

Publications

TV, radio, digital and print advertising in key markets have increased our exposure in publications including Wisconsin Outdoors, Illinois Outdoors, Great Lakes Angler, Lake Ontario Outdoors, Outdoor Guide, Lake Ontario Counties Trout and Salmon Newspaper, NY Outdoor News Newspaper, Lake Ontario United, On The Water and WLVL.

The Outdoor Beat

This LCTV show, hosted by Bill Hilts, Jr. completed its second full year and is one of the most popular outdoor shows in Western New York.

Fishing & Outdoor Expo

The 3rd Annual Greater Niagara Fishing and Outdoor Expo was held at the Conference and

Event Center Niagara Falls and saw a ten percent increase in attendance. Booth space from vendors was sold out and this provided additional overnight stays in Niagara Falls hotels, generating revenue for local businesses in January, a typically slower month.

Derbies and Tournaments

We support the following tournaments with financial, marketing and physical resources.

32nd Annual Lake Ontario Pro Am Salmon Team Tournament:

- 51 teams from around the Northeast
- Approximately 300 people in the destination for a minimum of three days

Greater Niagara Fish Odyssey Derby

Approximately 400 participants

Lake Ontario Counties Trout and Salmon Derbies

- Three annual events (Spring, Summer, Fall)
- Approximate number of attendees:
 - » Spring: 3-4,000
 - » Summer: 2,500
 - » Fall: 6-7,000





Outdoor coverage across all media channels (print, television, online, etc.)



Visiting Media Hosted



BUFFALO NIAGARA FILM COMMISSION

We always knew that our region was a star but now it seems that Hollywood is also getting the picture. The variety and eclectic nature of the locales we have to offer have helped bring to life several movies from independents to blockbusters.

Movies

MARSHALL



The vintage jail cells and office

spaces inside the LaSalle branch

of the Niagara Falls Public Library

became the backdrop for some

pivotal scenes in the movie

"Marshall". This 1940 period

legal drama about a case in the

Court Justice Thurgood Marshall

stars Chadwick Boseman, Kate

Hudson, Josh Gad, Dan Stevens

and Emmy award winner Sterling

already receiving "Oscar buzz" in

K. Brown. "Marshall" is set for

release in October 2017 and is

Hollywood trade magazines.

early legal career of Supreme



SHARKNADO 4

The 4th edition of the highly successful cult movie franchise "Sharknado" was shot at Niagara Falls State Park in May 2016. "Sharknado 4: The 4th Awakens" aired in August 2016 on the Syfy Network to a worldwide audience. The climactic scene occurred near the Maid of the Mist docks as well as Luna Island and other parts of the park. This marked the second visit of Sharknado director Anthony Ferrante who shot "Sharknado 2: The Second One" in 2014 at the Lockport Caves and Underground Boat Ride.



HER FINAL BOW AND VOWS OF MADNESS

Hollywood Director Fred Olen Ray used Niagara County for two movies in 2016. Main locations included the Riviera Theater in North Tonawanda for "Her Final Bow" which aired in 2016 on the Lifetime Movie Network. The Barton Mansion was also used for the thriller "Vows of Madness." Scenes were also shot at Warren's Hardware Store and St. Paul's Church in Lewiston.

Additional movie shoots in Niagara Falls included "Vengeance: A Love Story" directed by and starring Nicholas Cage, "Crossbreed" starring Vivica Fox with Daniel Baldwin, and "Taipei" starring Ellie Bamber.

Television



Television shoot highlights in Niagara County included "House Hunters International" for HGTV, and a PBS cooking show for kids entitled "Twice as Good" which utilized Niagara Falls State Park and Old Fort Niagara as scenic backdrops. Comedian Gary Owens traveled to Niagara Falls in August to shoot an episode of his reality show which appears on THE BET Network and a live television segment for a Chicago area TV morning show highlight the mighty cataracts to a large audience.

BOARD & COMMITTEES

2016 NTCC Board of Directors

Name	Business	Category	
Deanna Alterio-Brennen	Niagara USA Chamber of Commerce General Busin		
Michael Fiore	Village Bake Shoppe	General Business	
Anthony Brindisi	Keller Insurance	General Business	
Michael Capizzi	Michaels Restaurant	General Business	
Lucy Muto	M&T Bank	General Business	
Doug Nickerson	American Niagara Hosp/Sheraton at the Falls	Hospitality/Tourism	
Galeb Rizek	Econo Lodge	Hospitality/Tourism	
Barb Hughes	Webster's Bistro	Hospitality/Tourism	
Duncan Ross	Arrowhead Spring Winery	Hospitality/Tourism	
Marc Papaj	Seneca Gaming Corporation	Hospitality/Tourism	
Anne McCaffrey	City of Lockport	Investor Appointment	
Richard Updegrove	hard Updegrove Niagara County Legislature Rep		
Mayor Paul Dyster	yor Paul Dyster City of Niagara Falls		
John Percy	Niagara Tourism & Convention Corp.	Ex-Officio/Non-Voting	
Mark Mistriner	NCCC/Culinary Institute/Hospitality	Ex-Officio/Non-Voting	
Kurt Stahura	Niagara University Hospitality	Ex-Officio/Non-Voting	
Chris Schoepflin	USA Niagara Development	Ex-Officio/Non-Voting	
Angela Berti NYS Parks (permanent seat)		Ex-Officio/Non-Voting	

Commitees

Executive	Anthony Brindisi	Michael Fiore	Galeb Rizek	Deanna Alterio-Brennen
Title	Chair	Vice	Treasurer	Secretary

Finance	Nominating	Marketing Ad Hoc
Anthony Brindisi	Anthony Brindisi	Michael Fiore
Michael Fiore	Michael Fiore	Galeb Rizek
Galeb Rizek	Galeb Rizek	Barb Hughes
Lucy Muto	Barb Hughes	Duncan Ross
Doug Nickerson		Doug Nickerson
		Angela Berti

FINANCE

2016 Actual Budget

Revenue		% of Revenue	Expenses		% of Revenue
Niagara Falls	\$2,050,321	51.2%	Personnel	\$1,225,152	29.4%
Bed Tax			Marketing	\$2,276,635	54.6%
Lockport Bed Tax	\$89,753	2.2%	Group Leisure	\$101,775	2.4%
Niagara County Bed Tax	\$143,658	3.6%	Convention and Meeting	\$71,764	1.7%
Business \$431,217 10.8%	10.8%	International Markets	\$103,116	2.5%	
Generated Revenue			Visitor Services	\$113,056	2.7%
Grants	\$113,913	2.8%	Outdoor Promotion	\$92,148	2.2%
Casino Revenue	\$1,179,455				
Total	\$4,008,317		General and Administration	\$184,660	4.4%
Net Investment Activity	\$256,805		Total	\$4,168,306	



John Percy President & CEO

"Increased tourism means economic growth for our local businesses. In order to continue to drive growth, in 2016 we kicked off the initial research phase for our new brand. We had the opportunity to engage local stakeholders and consumer groups in order to develop an authentic, powerful brand that will help us increase destination awareness for years to come."



Board Chairman

served as Chairman and to see firsthand the hard work and dedication that comes from this team of professionals. The continued growth year after year in the tourism industry in Niagara County is a true testament to this organizations strategic efforts to promote Niagara Falls USA to the world."





Our Mission

We are a private non-profit with a mission to expand the economic prosperity of the Niagara Falls USA communities by generating individual and group visitation.

