EVOLUTION OF NIAGARA COUNTY TOURISM BY THE NUMBERS*

*Source: Tourism Economics: Economic Impact of Tourism in New York 2010-2018

**Tourism Spend**

- Year 2010: $450 million
- Year 2011: $490 million
- Year 2012: $525 million
- Year 2013: $570 million
- Year 2014: $615 million
- Year 2015: $660 million
- Year 2016: $705 million
- Year 2017: $750 million
- Year 2018: $800 million

Increase over 8 years: 66.5%

**Local Taxes**

- Year 2010: $20 million
- Year 2011: $30 million
- Year 2012: $35 million
- Year 2013: $40 million
- Year 2014: $45 million
- Year 2015: $50 million
- Year 2016: $55 million
- Year 2017: $60 million
- Year 2018: $65 million

Increase over 8 years: 65.9%

**Employment**

- Year 2010: 12,000
- Year 2011: 12,807
- Year 2012: 13,793
- Year 2013: 14,234
- Year 2014: 14,968
- Year 2015: 15,263
- Year 2016: 15,844
- Year 2017: 16,242
- Year 2018: 16,373

Increase over 8 years: 27.8%
DIGITAL MARKETING CAMPAIGNS

We launched integrated marketing campaigns in targeted markets to generate incremental visitation and spend along with repeat business.

### Spring
March 8 – May 31

<table>
<thead>
<tr>
<th>Impressions</th>
<th>Web Conversions</th>
<th>Travel Guide Requests</th>
<th>1 Minute 30 Seconds Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>48,566,405</td>
<td>389,799</td>
<td>6,088</td>
<td>157,205</td>
</tr>
<tr>
<td>360,125</td>
<td>576</td>
<td>12,361</td>
<td>1,493,224</td>
</tr>
<tr>
<td>48,566,405</td>
<td>389,799</td>
<td>6,088</td>
<td>157,205</td>
</tr>
</tbody>
</table>

### Fall
August 5 - October 10

<table>
<thead>
<tr>
<th>Impressions</th>
<th>Web Conversions</th>
<th>Travel Guide Requests</th>
<th>1 Minute 30 Seconds Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>15,289,268</td>
<td>275,055</td>
<td>2,934</td>
<td>115,138</td>
</tr>
<tr>
<td>223,729</td>
<td>193</td>
<td>9,706</td>
<td>633,901</td>
</tr>
<tr>
<td>223,729</td>
<td>193</td>
<td>9,706</td>
<td>633,901</td>
</tr>
</tbody>
</table>

### Winter
November 1 - December 19

<table>
<thead>
<tr>
<th>Impressions</th>
<th>Web Conversions</th>
<th>Travel Guide Requests</th>
<th>1 Minute 30 Seconds Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,446,820</td>
<td>121,068</td>
<td>883</td>
<td>46,258</td>
</tr>
<tr>
<td>28,470</td>
<td>66</td>
<td>2,293</td>
<td>208,446</td>
</tr>
<tr>
<td>28,470</td>
<td>66</td>
<td>2,293</td>
<td>208,446</td>
</tr>
</tbody>
</table>

$72,999,451$  
Total Incremental Spending**  
(Overnight + Day Trips)

$12,931,931  
Hotel Revenue

100:1  
RETURN ON INVESTMENT

88,575  
Hotel Rooms Booked

*Based on Adara Attribution platform measuring actual consumer transactions generated from Niagara Falls USA website and digital ad placements.

5Above amount used in calculation of organization ROI on page 16.
MEDIA

As stewards of a world-renowned icon, we work tirelessly to garner significant media attention.

| 14 | 91 | 144,114,025 |
|Visiting Media Hosted|Destination stories across all media channels (print, television, online, etc.)|Total number of media impressions (Individual views)|

TOP MEDIA PLACEMENTS

Our two top media placements in 2019 resulted from hosting travel media within the destination.

- **Lonely Planet**
  - A Boozy Tour Through New York’s Niagara County
  - **11,849,867 IMPRESSIONS**

- **MSN.com**
  - 15 Best Summer Weekend Getaways You’ll Want to Book This Second
  - **10,031,198 IMPRESSIONS**
## WEBSITE & SOCIAL MEDIA

![Image](image.png)

**2019 WEBSITE VISITATION:**

<table>
<thead>
<tr>
<th>Stat</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 Page Views:</td>
<td>2,826,487</td>
</tr>
<tr>
<td>2019 Unique Visits:</td>
<td>1,036,902</td>
</tr>
<tr>
<td>Total Blogs</td>
<td>37</td>
</tr>
</tbody>
</table>

**Stats for Facebook, Twitter, Instagram and LinkedIn**

<table>
<thead>
<tr>
<th>Stat</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total fans for all four channels:</td>
<td>115,575</td>
</tr>
<tr>
<td>Link clicks from posts:</td>
<td>98,946</td>
</tr>
<tr>
<td>Total impressions for Facebook, Twitter, Instagram and LinkedIn:</td>
<td>20.2 MILLION</td>
</tr>
<tr>
<td>Overall engagement for Facebook, Twitter, Instagram and LinkedIn:</td>
<td>496,856</td>
</tr>
</tbody>
</table>
THE OTHER SIDE OF NEW YORK

From April 12 – June 2, in partnership with Delaware North and Niagara Falls State Park, we launched “The Other Side of New York” integrated marketing campaign. This campaign targeted New York City and its surrounding boroughs highlighting the various adventures on the “other side of New York” in Niagara Falls USA. Interest targeting on digital platforms included users that matched at least one of the following criteria: hiking, adventure, bucket list, hiking trails, outdoor enthusiast, travel & adventure, weekend getaway and outdoor adventure. The path to purchase for this campaign was the Discovery Pass landing page on the Niagara Falls State Park website. It also included over 100 ads throughout Manhattan and the (5) boroughs on bus shelters promoting Niagara Falls USA.

3,443,164 Impressions
24,900 Clicks to landing page
4 minutes 21 seconds Average Time on Site

Paid Social Media

NYS Bus Shelter Ads
GLOBAL INITIATIVES
Brand USA Inspiration Guide Program 2019

Presenting Niagara Falls USA to the World

By attending/participating in travel trade marketplaces and carrying out sales calls/missions, we met with over (367) travel trade companies representing China, India, UK, Germany, Australia, France and more.

113 Referrals
Sent out tour operator requests for information to identified partners about their product.

2 Sales Missions
ILoveNY Ireland Sales Mission and Brand USA India Sales Mission

5 Tradeshows
IITA Summit, NAJ West, Connect Travel Marketplace, ITB, IPW

12 Site Visits
In-market familiarization tours with Tour Operators and Receptive Tour Operators

Partnerships

Find us @niagarafallsusa
niagarafallsusa.com | 1-877-FALLS US
VisaVue® provides transactional data and insight into consumers, who use Visa credit cards. We are able to identify and track the spending activity of international visitors throughout Niagara County. This provides performance measures highlighting: year over year growth of Visa card users in Niagara County, top market segments by spend, top originating countries by spend along with multiple other data points.

**Top Originating Countries by Spend amount ($M US)**
- Canada: $59.1
- China Mainland: $2.5
- Germany: $0.7
- India: $0.6
- United Kingdom: $0.5
- Saudi Arabia: $0.3
- Puerto Rico: $0.3
- France: $0.3
- Australia: $0.3
- Spain: $0.3

**Top Market Segments by Spend Amount ($M US)**
- Apparel & Accessories: $16.6
- Food & Grocery: $10.2
- Professional Services: $6.3
- Fuel: $5.9
- Retail Goods: $5.7
- Discount Stores: $5.7
- Restaurants: $4.8
- Lodging: $4.0
- Department Stores: $2.5
- Wholesale Clubs: $2.1

---

**World Pride**

From April 15-June 15 we ran native and display ads across Expedia Group’s ad network targeting users that were traveling to New York City for World Pride events. All ads drove users to a dedicated landing page on Expedia’s website.

<table>
<thead>
<tr>
<th>Room nights</th>
<th>Clicks</th>
<th>Travel Guide Requests</th>
<th>Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,300</td>
<td>1,327</td>
<td>4,639</td>
<td>130,585</td>
</tr>
<tr>
<td>2,363,315</td>
<td>427</td>
<td>10,617</td>
<td>584,938</td>
</tr>
</tbody>
</table>

**Here, everyone takes pride in the rainbow**

<table>
<thead>
<tr>
<th>Online Views</th>
<th>Email Sign-Ups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,327</td>
<td>427</td>
</tr>
<tr>
<td>4,639</td>
<td>10,617</td>
</tr>
</tbody>
</table>

**Plan Your Trip**
LEISURE GROUP SALES

Leisure Group Sales focuses their efforts on increasing motor coach business to Niagara County while providing support to groups that are in the destination.

<table>
<thead>
<tr>
<th>Tours</th>
<th>Estimated Economic Impact:</th>
</tr>
</thead>
<tbody>
<tr>
<td>92 Overnight Groups</td>
<td>$1,480,976</td>
</tr>
<tr>
<td>50 Day Trips</td>
<td>$204,136</td>
</tr>
<tr>
<td>16 Additional Groups Assisted</td>
<td>$166,251</td>
</tr>
</tbody>
</table>

TOTAL = 158 GROUPS*

TOTAL ESTIMATED ECONOMIC IMPACT = $1,851,363

Sales Missions

In 2019, we hosted two sales missions to Pennsylvania and Ohio to meet directly with twenty tour operators. The goal of these missions was to encourage tour operators to consider adding Niagara Falls USA to their group tour options. The results:

11 Additional Group Trips Booked 676 Room Nights EEI: $142,608

Tradeshows

204 Appointments 7 Domestic Tour Operator Tradeshows Attended

Return on Investment — 9:1

*Above amount used in calculation of organization ROI on page 16.
*Motorcoach business booked by Destination Niagara USA Staff. Not all Motorcoach business is reported to our organization.
CONVENTION AND MEETING SALES

The Convention and Meeting Sales team continues to grow this market and to attract regional and national conferences along with New York State and National Associations. The team also focused more heavily on growing the SMERF (social, military, education, religious and fraternal) market and expanding services to in-market conventions.

31
Conventions/Meetings Booked in 2019

Total Room Nights:
15,742

EEI:
$12,104,157$

Convention Social Geo-Targeting

In 2019, we executed geo-fence ad campaigns, which targeted two meeting planner tradeshows. The geo-fence technology pixeled users that were located within the defined target range around the conference location. The ads directed users to a dedicated landing page on the Niagara Falls USA website, which highlighted meeting planner destination attributes.

83,442
Total Impressions

18,848
Total Paid Reach

190
Total Link Clicks

45:1
Return on Investment

$ Event Impact Calculator is provided by Destinations International, a professional organization representing destination marketing organizations worldwide. Calculations are based on meeting/event type, season, room and number of attendees. Above amount used in calculation of organization ROI on page 16.
MOVING VISITORS THROUGH NIAGARA COUNTY

We know Niagara Falls USA attracts visitors from all over the world, and we want to make sure everyone has an extraordinary experience. That’s why we ensure every connection with our brand from the website and social media to our brand ambassadors exceeds expectations.

Visitor Center

In 2019, the Niagara Falls USA Official Visitor Center welcomed 133,089 visitors, which was a 4.3% decrease over 2018.

Retail

The retail shop in the Niagara Falls USA Official Visitor Center saw significant increases in 2019 with over 8,500 branded items sold, taking the Niagara Falls USA moniker all over the globe. We have sold over 12,000 inventory items since beginning retail in 2018.

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.

219 members of the hospitality and tourism community completed EXP Niagara during 2019, for a total of 728 Certified EXP Pros since the program’s launch.

Ice Cream Appreciation Trail

In honor of National Travel & Tourism Week, in 2019, we introduced the Ice Cream Appreciation Trail the first week of May. In partnership with a local ice cream truck vendor, we traveled across Niagara County and passed out free ice cream to all of our hospitality and tourism partners to show our appreciation for all that they do for our visitors.
We produce several collateral pieces providing inspiration to visit or book a group/meeting in Niagara Falls USA. They motivate and encourage people to visit and explore Niagara County.

**Travel Guide**
With a circulation of 500,000, the Travel Guide provides an in-depth platform on which to tell the real story of Niagara Falls USA inspiring visitors from all over the world.

**Tour Planner**
This sales tool is used for both domestic and international tour planners. It provides information including suggested itineraries and businesses that are group-friendly, encouraging planners to book in the destination.

**Meeting Planner Guide**
As we continue to grow our meetings and convention business, our Meeting Planner Guide provides the tools needed to consider booking a meeting in Niagara Falls USA, including room specifications and unique venues in the region.

**Outdoor Adventure Guide**
As we continue to build on our Niagara Falls USA, Where Adventure Comes Naturally brand, we created The Niagara Falls USA Outdoor Guide featuring year-round fishing, birding, hiking and biking opportunities. This guide is distributed at outdoor consumer shows as well as our Visitor Center and is a popular planning tool for our in market visitor.
OUTDOOR PROMOTIONS

Niagara Falls USA is known for the wide variety of outdoor adventure 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 Fishing 411 with the World Fishing Network, Lake Ontario Counties Trout and Salmon Newspaper, NY Outdoor News Newspaper, Lake Ontario United, WLVL, & Eastern Fly Fishing.

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

Fishing & Outdoor Expo
The 6th Annual Greater Niagara Fishing and Outdoor Expo was held at the Conference and Event Center. The event saw a decrease in attendance due to weather. 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.

35th Annual Lake Ontario Pro Am Salmon Team Tournament:
- 50 teams from around the Northeast
- Approximately 300 people in the destination for a minimum of three days

43rd Annual 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: more than 4,000
  - Summer: 3,000
  - Fall: 7,000

Outdoor Media Relations Highlights:

Birds on the Niagara
The inaugural Birds on the Niagara event was held Jan. 25-26, 2019 sponsored by the Niagara River Greenway Commission, NYS Parks, Buffalo Audubon and more as we assisted with the marketing and promotion of this new winter event in our very own globally-recognized Important Bird Area.
The Buffalo Niagara Film Commission promotes film production throughout WNY. These numbers reflect only Niagara County.

- **Completed Productions**: 22
- **Completed Scouts & Inquiries**: 28
- **Production Days**: 53

**Local Spend By Type**
- Feature Film: $2,910,000
- Documentary: $250,000
- Commercial: $100,000
- Television: $287,500

**Production Days By Type**
- Feature Film: 33%
- Documentary: 20%
- Commercial: 7%
- Television: 40%

**TOTAL ESTIMATED ECONOMIC IMPACT**

$3,547,500

**Return on Investment** – 79:1

Totals determined by production reports, and AFCI calculations based upon industry accepted totals including production day counts, production type, and crew member counts in Niagara County.

1 Above amount used in calculation of organization ROI on page 16.
## BOARD & COMMITTEES

### 2019 Destination Niagara USA Board of Directors

<table>
<thead>
<tr>
<th>Name</th>
<th>Business</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carol Calato</td>
<td>Calato Manufacturing</td>
<td>General Business</td>
</tr>
<tr>
<td>John DiGuiseppe</td>
<td>Platter’s Chocolates</td>
<td>General Business</td>
</tr>
<tr>
<td>Mark Laurrie</td>
<td>Niagara Falls City Schools</td>
<td>General Business</td>
</tr>
<tr>
<td>Lucy Muto</td>
<td>M&amp;T Bank</td>
<td>General Business</td>
</tr>
<tr>
<td>Lynn Oswald</td>
<td>Small Business Development Center</td>
<td>General Business</td>
</tr>
<tr>
<td>Doug Nickerson</td>
<td>American Niagara Hosp/Sheraton Niagara Falls</td>
<td>Hospitality/Tourism</td>
</tr>
<tr>
<td>Melissa Free</td>
<td>Seneca Gaming Corporation</td>
<td>Hospitality/Tourism</td>
</tr>
<tr>
<td>Galeb Rizek</td>
<td>Econo Lodge/Comfort Inn &amp; Suites</td>
<td>Hospitality/Tourism</td>
</tr>
<tr>
<td>Lou Paonessa</td>
<td>NYPA - Niagara Power Vista</td>
<td>Hospitality/Tourism</td>
</tr>
<tr>
<td>Brett Stewart</td>
<td>Merani Hotel Group</td>
<td>Hospitality/Tourism</td>
</tr>
<tr>
<td>Mayor Paul Dyster</td>
<td>City of Niagara Falls</td>
<td>Investor Appointment</td>
</tr>
<tr>
<td>Mayor Michelle Roman</td>
<td>City of Lockport</td>
<td>Investor Appointment</td>
</tr>
<tr>
<td>Richard Updegrove</td>
<td>Niagara County Legislature Representative</td>
<td>Investor Appointment</td>
</tr>
<tr>
<td>Angela Berti</td>
<td>NYS Parks (Permanent Seat)</td>
<td>Ex-Officio/Non-Voting</td>
</tr>
<tr>
<td></td>
<td>NCCC/Culinary Institute/Hospitality</td>
<td>Ex-Officio/Non-Voting</td>
</tr>
<tr>
<td>John Percy</td>
<td>Destination Niagara USA</td>
<td>Ex-Officio/Non-Voting</td>
</tr>
<tr>
<td>Anthony Vilardo</td>
<td>USA Niagara Development</td>
<td>Ex-Officio/Non-Voting</td>
</tr>
<tr>
<td></td>
<td>Niagara University</td>
<td>Ex-Officio/Non-Voting</td>
</tr>
</tbody>
</table>

### Committees

<table>
<thead>
<tr>
<th>Executive</th>
<th>Brett Stewart</th>
<th>Galeb Rizek</th>
<th>Lynn Oswald</th>
<th>Lucy Muto</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Chair</td>
<td>Vice Chair</td>
<td>Treasurer</td>
<td>Secretary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Finance</th>
<th>Galeb Rizek</th>
<th>Lucy Muto</th>
<th>Doug Nickerson</th>
<th>Lynn Oswald</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nominating</th>
<th>Lucy Muto</th>
<th>Galeb Rizek</th>
<th>Mark Laurrie</th>
<th>Brett Stewart</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### FINANCE

#### 2018 Financial Summary*

<table>
<thead>
<tr>
<th>Revenue</th>
<th>% of Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Niagara Falls Bed Tax</td>
<td>$2,227,611</td>
</tr>
<tr>
<td>Niagara County Bed Tax</td>
<td>$207,589</td>
</tr>
<tr>
<td>Lockport Bed Tax</td>
<td>$76,617</td>
</tr>
<tr>
<td>Grants</td>
<td>$121,628</td>
</tr>
<tr>
<td>Business Generated Revenue</td>
<td>$853,751</td>
</tr>
<tr>
<td>Retail</td>
<td>$107,998</td>
</tr>
<tr>
<td>Casino</td>
<td>$0</td>
</tr>
<tr>
<td>Total</td>
<td>$3,595,194</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>% of Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>$1,272,894</td>
</tr>
<tr>
<td>Marketing</td>
<td>$2,109,597</td>
</tr>
<tr>
<td>Group Leisure</td>
<td>$87,615</td>
</tr>
<tr>
<td>Convention and Meeting</td>
<td>$165,199</td>
</tr>
<tr>
<td>International Markets</td>
<td>$159,521</td>
</tr>
<tr>
<td>Visitor Services</td>
<td>$136,097</td>
</tr>
<tr>
<td>Outdoor Promotion</td>
<td>$90,218</td>
</tr>
<tr>
<td>General and Administration</td>
<td>$228,515</td>
</tr>
<tr>
<td>Total</td>
<td>$4,249,656</td>
</tr>
</tbody>
</table>

#### Overall Organization ROI — **36:1**

**Hotel Data**

**SMITH TRAVEL RESEARCH DATA (STR REPORT)**

- **$112.42**
  - Average Daily Rate
  - (2.4% decrease from 2018)

- **58%**
  - Occupancy
  - (1.7% increase from 2018)

- **$65.15**
  - REVPAR
  - (0.8% decrease from 2018)

**SUPPLY:**

- **1,197,538**
  - (0.8% increase from 2018)

**DEMAND:**

- **694,012**
  - (2.5% increase from 2018)

*Interim unaudited statements*
Destination Niagara USA

**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.

**Positioning Statement:** For those who would rather go and do rather than just see, Niagara Falls USA is the embodiment of America's adventurous spirit, connecting people to nature through immersive experiences that move, challenge and inspire them.