A profile of Americans who are interested in visiting the City of Niagara Falls

February 2006

Introduction

This report is extracted from the database of the Travel Intentions study that the Ministry of Tourism has been conducting for almost 3 years now. Specifically, it is based on a number of questions that were asked during the May 2005 wave.

The total US sample of the study is 3,902 of which 2,889, or 77%, are defined in this report as "travellers" because they have taken at least one overnight trip over the past 2 years, or intend to take an overnight trip over the next 12 months or both.

Although this reports talks about "American travellers", or "Americans", the study covers only the following US states:

- New York State
- Pennsylvania
- Ohio
- Indiana
- Michigan
- Illinois
- Wisconsin
- Minnesota
- Massachusetts
- Washington DC/ Maryland

Americans who were aware of Niagara Falls (96%), were asked whether or not they were interested in visiting the city of Niagara Falls within the next two years or so. The answers show that 43% of the adult Americans were fairly or very interested in visiting Niagara Falls over the next 2 years or so.

Interest in the City of Niagara Falls was higher among Americans who had never been to Ontario before (50% were interested) than among those who had (42%).

US Residents Interested in Visiting Niagara Falls over the next 2 years or so
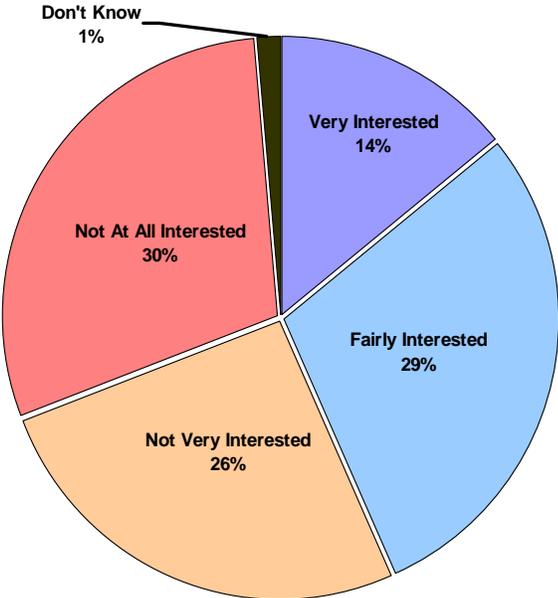
Americans Interested in Visiting Niagara Falls over the next 2 years or so

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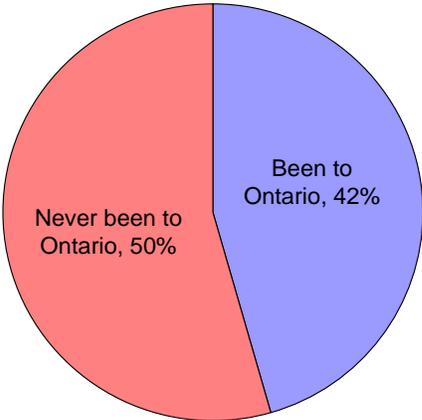
Those who indicated that they were fairly or very interested in visiting Niagara Falls were asked why they were interested, while those who were not interested were asked the reasons of why not. This report deals with the 43% of Americans who indicated that they were fairly or very interested in visiting Niagara Falls.

We have grouped the responses given into 21 categories (see Table 1). By far, the reason most often given for being interested in visiting the city of Niagara Falls was to "see the Falls" (76%), followed by reasons that mention a specific city-attribute (13%) and those who think that the city is beautiful (11%). The difference between the responses in group 2 and group 3 is that the former responses mention a specific city attribute such as "safe", while the latter responses are generic, e.g., "beautiful city".

TABLE 1: Reasons for being interested in visiting the city of Niagara Falls over the next 2 years or so	
1. To See the Falls/walk around the Falls	76%
2. Safe/friendly/small/clean/lots of things to do	12%
3. Beautiful/nice city/I like it/fun city/interesting city	12%
4. To visit an attraction(s)	9%
5. Curiosity/heard a lot about it	8%
6. To visit the casino/gamble	8%
7. To sightsee	8%
8. To take the kids/family there/lots of things for kids to do	5%
9. See it again/see the changes	5%
10. For the nightlife/entertainment/shopping	5%
11. For the restaurants/hotels	4%
12. For the culture/art/architecture/history	3%
13. Generic reasons not specific to Niagara Falls, e.g., "for a vacation"	2%
14. Because it is not far/can drive by car there	2%
15. For romance/honeymoon	2%
16. To see a play/theatre	2%
17. To visit on the way to some other place	1%
18. To visit friends or relatives	1%
19. For camping/the parks/golfing	1%
20. For business/conference	0%
21. To see a sporting event	0%

What is important to note in Table 1 is that other than the Falls themselves, nothing else jumps out in terms of specifics for the city. For example, only 9% of the respondents mentioned that they had an interest in visiting the city's attractions and only one-third of those mentioned specifically an attraction (such as Marineland or the wax museums or the vineyards).

Attractions or experiences that one would have expected to do better were only mentioned by a small number of respondents. For example, only 2% mentioned honeymooning or having a romantic experience as motivating their interest in visiting the city and only 8% mentioned gambling or the casino. This may be the result of either lack of awareness for the other products that the city or the region offer or a lack of interest in those products.

Below we will investigate the profile of the respondents for the top 2 reasons of visiting the city.

Americans who were interested in visiting the city of Niagara Falls in order to see the Falls enjoy travelling, prefer well branded (popular) destinations are relatively well educated (48% have university or higher degrees), have an average income of $65,000, an average age of 42 and most of them are married.

Although these Americans showed interest in visiting the City of Niagara Falls, given that their overall rating for the city as a travel destination was 8.3 points out of 10 – a good rating but not a stellar one for people who expressed interest in the destination – and that only 8% intended to visit the City during the upcoming season, some additional work needs to be done if this interest is to be converted to an actual visit. In particular, the additional work needed seems to revolve around product awareness/diversification and barriers to travel to Canada.

As Table 2 indicates, apart from the Falls, these Americans could not mention any other product that the city or the region offer, meaning that they are either not interested in any other products the area offers or not aware of them. Overall, these Americans volunteered 1.7 positive statements about the city of Niagara Falls.

In addition, although only 9% mentioned any barriers to travel to Canada, these issues need to be addressed since some of them are incorrect impressions, e.g., SARS.

New York state, Pennsylvania and Ohio account for almost half (49%) of the Americans who expressed an interest in visiting the City of Niagara Falls in order to see the Falls. At the sub-state level, New York City and Chicago appear to be the most promising cities for targeting these Americans.

TABLE 2: A profile of Americans who showed interest in visiting the city of Niagara Falls in order to see the Falls	
% who travelled in past 2 years	84%
% Intending to visit NF during the next season	8%
Their top 10 ideal travel destinations in the world	Hawaii (11%) Australia (6%) Italy (5%) Don't Know (4%) Paris (3%) Alaska (3%) The Grand Canyon (3%) Ireland (3%) Sydney (2%) Egypt (2%)
% who have visited Ontario in the past	45%
Last Trip to Ontario: - 5 or more years ago - 3 to 4 years ago - 1 to 2 years ago - past 12 months	 56% 19% 11% 14%
Specific Reasons for being interested in NF over next 2 years (top 10)	See the Falls (95%) Maid of the Mist/the water (7%) The casino (6%) Take the kids (4%) To sightsee (4%) Restaurants/the food (4%) The attractions (3%) Outdoors/wildlife (3%) Shopping (3%) A beautiful city (2%)
Ratings of NF as a travel destination: 10 (excellent) 9 8 7 6 5 4 3 2 1 (very poor) Average	 28% 17% 28% 16% 6% 3% 1% 0% 0% 0% 8.3
% who indicated some specific issues that make them less inclined to travel to NF	9%
Top 10 issues of the 9% who indicated that they had specific concerns:	Hassles/delays at the borders (22%) SARS (16%) Passport requirement (13%) Negative attitudes of people (12%) Canada lets in terrorists (7%) Mad cow (7%) Costs/it is too expensive (6%) The exchange rate (4%) Canada did not support us in Iraq war (3%) Not safe (3%)

Which of the following statements apply to you when planning a pleasure trip:	
I like to have all arrangements taken care of before I leave	72%
I am likely to make last-minute bookings	22%
In general, I look for discounts on travel	77%
I prefer to seek the advice of a travel agent rather than research options on my own	16%
I use the Internet to plan my pleasure trip	63%
I use the Internet to book my pleasure trips	57%

Marital Status
- Married/live with someone — 64%
- Single — 26%
- Separated/divorced/widowed — 11%

Education
- Post-graduate degree — 15%
- Graduated college/university — 33%
- Some college/university — 19%
- Graduated high school — 27%
- Did not complete high school — 4%
- Other — 2%

Household Income
- Less than $20,000 — 8%
- $20,000 - $39,999 — 20%
- $40,000 - $59,999 — 27%
- $60,000 - $79,999 — 18%
- $80,000 - $99,999 — 11%
- $100,000 - $149,999 — 13%
- $150,000 and over — 4%

Age
- 18 – 34 years old — 36%
- 35 – 54 years old — 45%
- 55 and over — 19%

Place of Residence:

Place of Residence	%
New York State	17%
New York City	9%
Buffalo	1%
Rochester	1%
Pennsylvania	17%
Philadelphia	6%
Pittsburgh	3%
Ohio	15%
Cleveland	3%
Cincinnati	2%
Michigan	12%
Detroit	5%
Illinois	10%
Chicago	8%
Washington DC	6%
Massachusetts	5%
Boston	3%
Indiana	5%
Indianapolis	2%
Minnesota	4%
Minneapolis	2%

The second group that this report profiles is the group that indicated interest in visiting the City of Niagara Falls because of a specific attribute of the city.

This group of Americans also enjoys travelling and prefers well branded (popular) destinations; it is relatively well educated (42% have university or higher degrees), but not as highly as the first group, has an average income of $51,000, an average age of 44 and most of its members are married.

This group of Americans rated the city of Niagara Falls more highly than the first group (average score 8.6 points) and had fewer issues with travel into Canada (7%). However, even for this group the largest attraction is the Falls and its members are also unable to mention any specific attractions or sites. This also implies some problems with either awareness or with the existing product.

Contrary to the first group, these Americans volunteered 2.3 positive statements about the city of Niagara Falls.

Illinois, Ohio and Michigan account for almost half (47%) of the Americans who expressed an interest in visiting the City of Niagara Falls because of a specific city-attribute. At the sub-state level, Chicago appears again to be the most promising city for targeting these Americans.

TABLE 3: A profile of Americans who showed interest in visiting the city of Niagara Falls because of an interesting city-attribute	
% who travelled in past 2 years	81%
% Intending to visit NF during the next season	12%
Their top 10 ideal travel destinations in the world	Hawaii (16%) Australia (7%) Rome (6%) Ireland (4%) Don't Know (5%) The Caribbean (4%) Paris (3%) Italy (3%) Europe (3%) China (3%)
% who have visited Ontario in the past	45%
Last Trip to Ontario: - 5 or more years ago - 3 to 4 years ago - 1 to 2 years ago - past 12 months	 50% 17% 16% 17%
Specific Reasons for being interested in NF over next 2 years (top 10)	To see the Falls/nature's wonder (40%) Scenery (35%) Nature/outdoors/wildlife (35%) Interesting city/has points of interest (8%) Restaurants/food (7%) Friendly city (7%) People watch/check out the people (6%) A clean city (6%) The casino (5%) A relaxing city (5%)
Ratings of NF as a travel destination: 10 (excellent) 9 8 7 6 5 4 3 2 1 (very poor) Average	 36% 18% 23% 13% 4% 1% 1% 1% 0% 0% 8.6
% who indicated some specific issues that make them less inclined to travel to NF	7%
Top 10 issues of the 7% who indicated that they had specific concerns:	Homosexual marriages (36%) Negative attitudes of people (18%) Costs/it is too expensive (9%) Canada lets in terrorists (6%) Don't know (4%) Hassles/delays at the borders (4%) Too far (3%) The high speed traffic (2%) SARS (2%) Passport requirement (1%)

Which of the following statements apply to you when planning a pleasure trip:	
I like to have all arrangements taken care of before I leave	74%
I am likely to make last-minute bookings	18%
In general, I look for discounts on travel	66%
I prefer to seek the advice of a travel agent rather than research options on my own	15%
I use the Internet to plan my pleasure trip	54%
I use the Internet to book my pleasure trips	50%

Marital Status
- Married/live with someone — 51%
- Single — 36%
- Separated/divorced/widowed — 13%

Education
- Post-graduate degree — 13%
- Graduated college/university — 29%
- Some college/university — 26%
- Graduated high school — 26%
- Did not complete high school — 7%
- Other — 0%

Household Income
- Less than $20,000 — 21%
- $20,000 - $39,999 — 26%
- $40,000 - $59,999 — 23%
- $60,000 - $79,999 — 11%
- $80,000 - $99,999 — 10%
- $100,000 - $149,999 — 9%
- $150,000 and over — 1%

Age
- 18 – 34 years old — 37%
- 35 – 54 years old — 32%
- 55 and over — 31%

Place of Residence:

New York State	12%
New York City	4%
Buffalo	3%
Rochester	1%
Pennsylvania	12%
Philadelphia	4%
Pittsburgh	2%
Ohio	16%
Cleveland	2%
Cincinnati	3%
Michigan	13%
Detroit	5%
Illinois	18%
Chicago	13%
Washington DC	5%
Massachusetts	10%
Boston	4%
Indiana	6%
Indianapolis	3%
Minnesota	4%
Minneapolis	2%